



SU Express



Training Exercise Manual

Purchasing Services

Winston Salem State University

January, 2023

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E-Procurement

What is E-Procurement?

It is a *Business to Business (B2B) web-based system* that will enhance our current requisitioning process.

- **75% E-Procurement processes**
- **25% Businesses that are not set-up through E-Procurement**

How does it work?

The web-based shopping cart method is used to process orders.

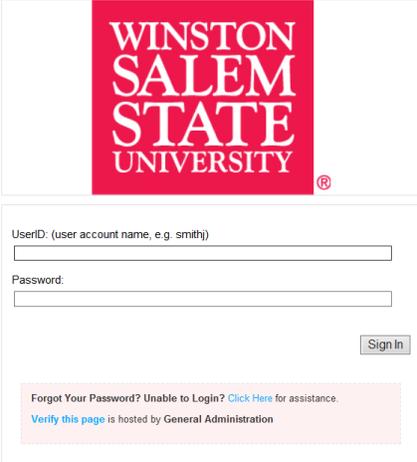
What are some of the benefits?

- **Point and click method used which will save time and cost**
- **Multiple vendors on one requisition done thru shopping cart process.**
- **Timeline of activity provided throughout entire process**
- **Increased discounts provided to WSSU due to other state schools/agencies utilizing Sci-Quest E-Procurement system.**

Logging into E-Procurement

<https://usertest.sciquest.com/apps/Router/SAMLAAuth/WinstonSalemState>

(NOTE: TEST URL LINK)



WINSTON
SALEM
STATE
UNIVERSITY

User ID: (user account name, e.g. smithy)

Password:

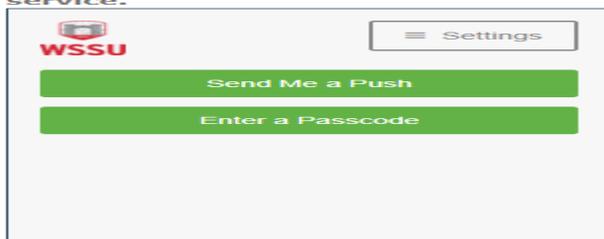
Forgot Your Password? Unable to Login? [Click Here](#) for assistance.
[Verify this page](#) is hosted by General Administration

- Input User name example: dixonjs (lowercase)
- Password (Network Password)
- Sign In
- Authentication with DUO Mobile required



WSSU

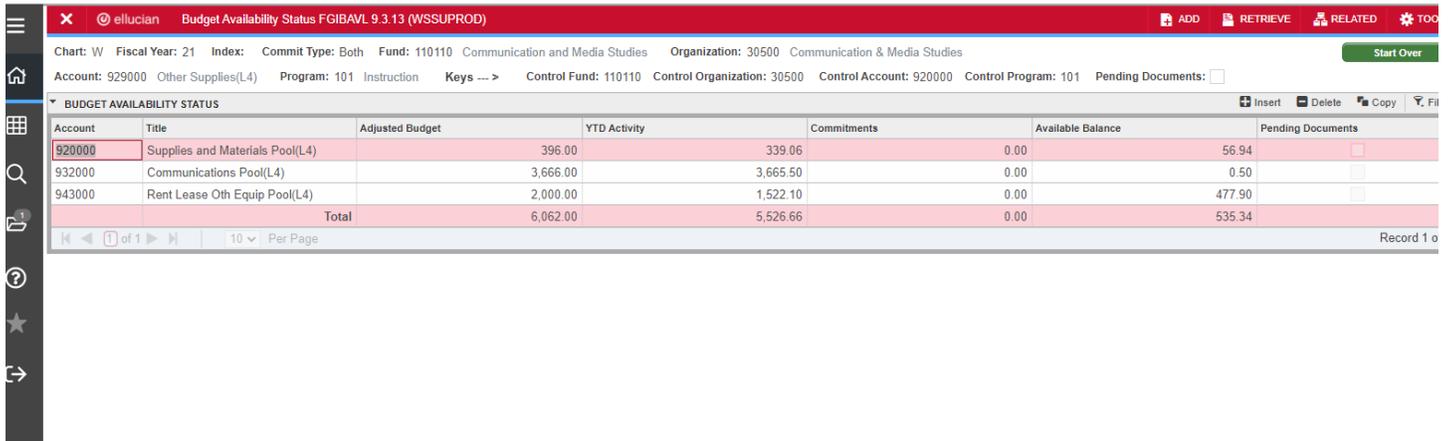
Authentication with Duo is required for the requested service.



WSSU

Getting Started.....

1. Always check FGIBAVL in Banner before inputting a requisition



The screenshot shows the Banner Budget Availability Status report for FGIBAVL 9.3.13 (WSSUPROD). The report is displayed in a table format with the following columns: Account, Title, Adjusted Budget, YTD Activity, Commitments, Available Balance, and Pending Documents. The data is as follows:

Account	Title	Adjusted Budget	YTD Activity	Commitments	Available Balance	Pending Documents
920000	Supplies and Materials Pool(L4)		396.00	339.06	0.00	56.94
932000	Communications Pool(L4)		3,666.00	3,665.50	0.00	0.50
943000	Rent Lease Oth Equip Pool(L4)		2,000.00	1,522.10	0.00	477.90
	Total		6,062.00	5,526.66	0.00	535.34

The report also includes a navigation bar at the top with options like ADD, RETRIEVE, RELATED, and TOO. The bottom of the report shows a pagination control indicating 10 items per page and the current record number (Record 1 of 1).

SU Express Homepage

To return to Homepage:



The screenshot shows the 'Shop • Shopping Dashboard' interface. At the top right, there are utility icons for currency (0.00 USD), a shopping cart, a heart icon, a notification bell with '01', and a user profile icon. The main header includes a search bar with the text 'Search for products, suppliers, forms, part number, etc.' and a search button. Below the search bar, there are two main content areas. On the left, an 'Organization Message' section contains information about a 'Mandatory Statewide Term Contract - Maintenance, Repair & Operation Supplies 445B', including details about the vendor Grainger and instructions for quote submissions. On the right, a 'Showcases' section displays a grid of vendor logos under three categories: 'Showcased Vendors' (VWR, Fisher Scientific, Grainger), 'Punch-out' (AlphaGraphics, Bio-Rad, CDWG, icancor, Inc.), and 'Forms' (Copy 3 ESLF-Provost Office Use Only, Request For Payment FY21). A 'Quick Links' sidebar on the right contains a 'Search Contracts' link. A vertical navigation menu is visible on the far left.

Three categories used in SU Express

Showcased Vendors

Multiple Supplier catalogs are combined into one internal virtual catalog. This is very handy for searching across multiple catalogs at once.

Punch-out

Individual external supplier catalogs. Each Punch-out site will have a unique layout and function differently for specified categories.

Non-Catalog

An order form designed to accommodate purchases for products not available through Showcased Vendors or Punch-out catalogs.

Showcased Vendors

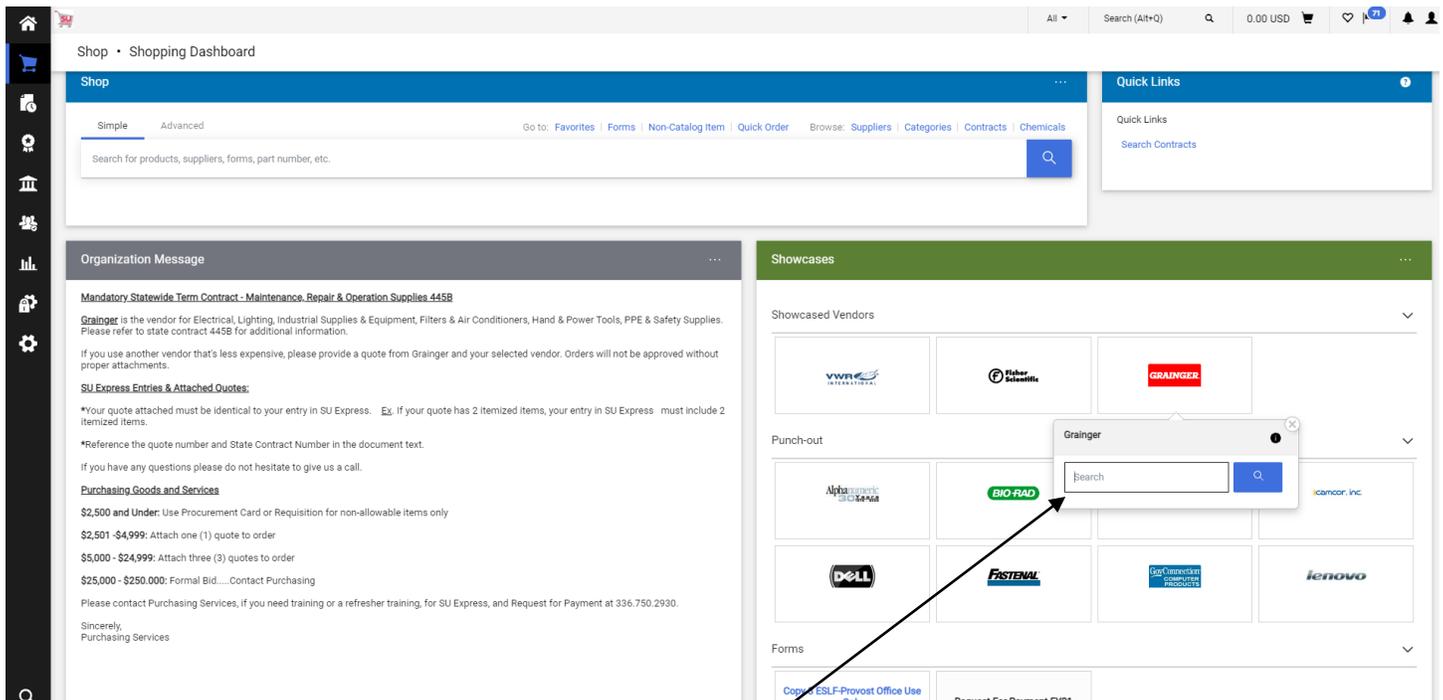
When items are searched, all items throughout the catalog which meet criteria will appear.



Exercise 1 - Showcased Vendors

1. Under Showcased Vendors

- Click Grainger



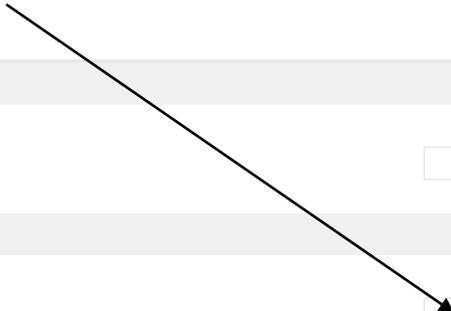
2. A box will appear

- Type wood hammer
- Click search light



3. Search results have been narrowed

Click item 2 and *add cart*, (highlighted in blue)



Hammer Handle Wood 9 1/8 In				9.43 USD
	Grainger	Part Number: 3ZLP4 System Packaging: EA	Mfg. Name: HALDER SIMPLEX Mfg. Part No.: 3244030	1 Add To Cart
				COMPARE
Hammer Handle Wood 9 5/8 In				9.75 USD
	Grainger	Part Number: 3ZLP5 System Packaging: EA	Mfg. Name: HALDER SIMPLEX Mfg. Part No.: 3244040	1 Add To Cart
				COMPARE
Hammer Handle Wood 10 13/16 In				11.11 USD
	Grainger	Part Number: 3ZLP6 System Packaging: EA	Mfg. Name: HALDER SIMPLEX Mfg. Part No.: 3244050	1 Add To Cart
				COMPARE

4. If you have completed shopping, click on picture of a cart in top right corner
Click on **View My Cart**



All Search (Alt+Q) 9.75 USD     

5. The following screen will appear. Select "View My Cart"

My Cart (Professor Jones' hammers)

	Hammer Handle Wood 9 5/8 In Quantity: 1 Price: 9.75 USD		View My Cart
			Checkout
			9.75 USD

- Name this Cart:** Under Name, rename Cart to something meaningful (ex. Professor Jones' hammers). Note: Date is not necessary in description, it will automatically populate.

Continue with "Proceed to Checkout" ←

Shopping Cart • 3353433

Simple Advanced

Search for products, suppliers, forms, part number, etc.

1 Item

Grainger • 1 Item • 9.75 USD

SUPPLIER DETAILS Billing 4: 2506 Greengate Drive, Greensboro, N.C.

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 Hammer Handle Wood 9 5/8 In	3ZLP5	EA	9.75	1 EA	9.75

ITEM DETAILS

Commodity Code: 27111602 Hammers

Taxable:

Capital Expense:

Details

For Jean Scales

Name: Professor Jones' hammers

Estimate (9.75 USD)

Subtotal	9.75
Shipping	0.00
Handling	0.00
Total	9.75

- The next few sections will consist of snapshots of your order. Each section can be edited by clicking on the pencil illustration.

The first section includes cart name, shipping, and billing information.

Requisition • 3357263

Summary Taxes/S&H PO Preview Comments Attachments History

Enter your search term

General

Cart Name: Professor Jones' hammers

Description: no value

Priority: Normal

Prepared by: Jean Scales

Standing Order:

PO Class Code: no value

Shipping

Ship To

Attn: Jean Scales
Phone: (336) 750-8645
Alumni House Room: 203
Winston-Salem State University
601 S Martin Luther King Jr. Dr
Alumni House
Winston-Salem, NC 27110
United States

Delivery Options

Expedite:

Ship Via: Best Carrier-Best Way

Requested Delivery Date: no value

Billing

Bill To

Accounts Payable
1604B Lowery Street
Winston-Salem, NC 27110
United States

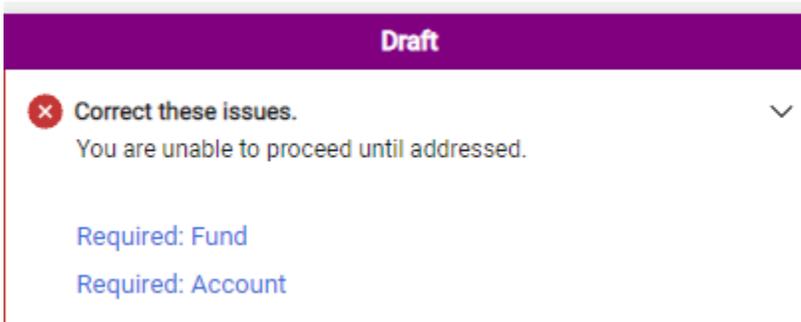
Credit Card Info

No credit card has been assigned.

Billing Options

Accounting Date: no value

8. This next section includes the message field on the right under “draft”. The message/draft field will display any missing information. For example: See message about fund and account.



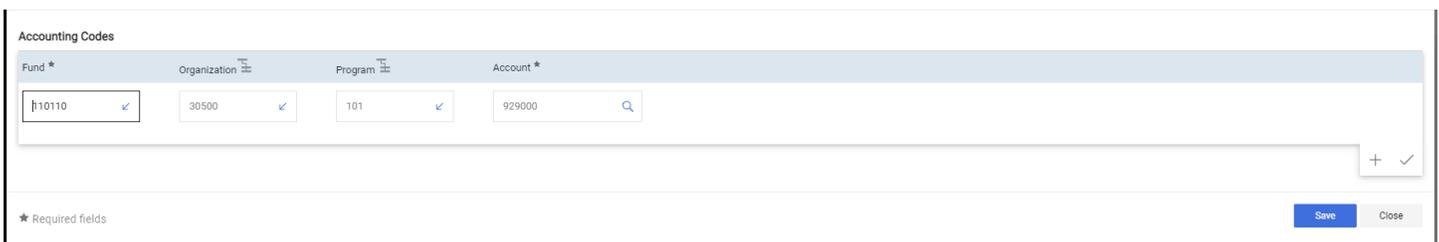
To enter the fund and account codes, click on the pencil illustration to edit or click information under draft.



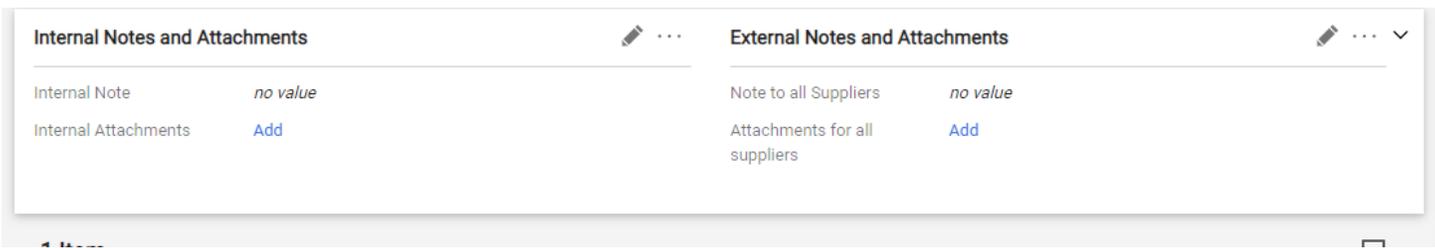
9. Click highlighted “Required field” under fund code.
10. Click on account, enter provided fund and account code 929000.

Note: Please always use correct account code that coincide with description of what you are ordering in production environment. **Account Code 929000** is for training purposes only.

Click Save

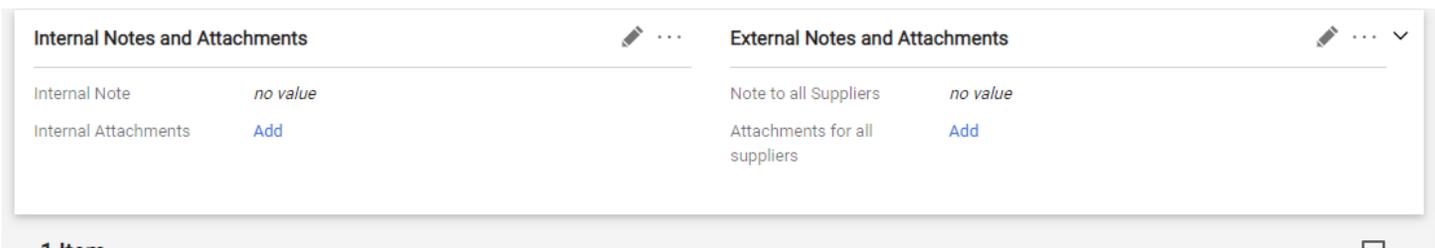


11. This section includes internal and external notes and attachments.



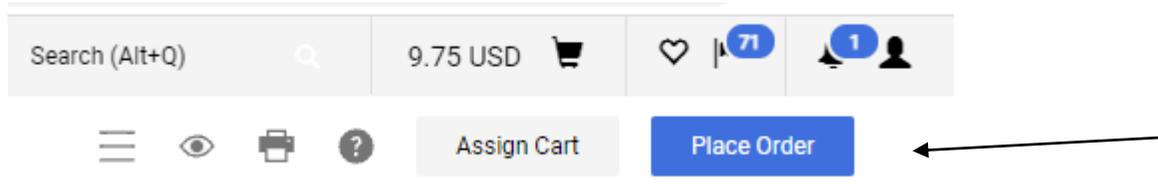
- Internal Notes and attachments are messages and attachments to share with your department and purchasing workflow within the WSSU family
- External Notes and attachments are for the vendor

12. Click eraser to add Internal Notes and Attachments or External Notes and Attachments to Suppliers. Note: Files can be imported from your desktop, stick, or drives.



13. Final Review

Scroll to the top of the screen to review your order and make sure no changes are required. If no changes, click “place order” on the right side of upper page.



14. Once the order is placed, you will receive confirmation of the order through email. Requisition number is included to identify this order.

Simple Advanced Go to: [Non-Catalog Item](#) | [Favorites](#) | [Forms](#) | [Shop](#) | [Quick Order](#) Browse: [Suppliers](#) | [Categories](#) | [Contracts](#) | [Chemicals](#)

Search for products, suppliers, forms, part number, etc. 

✔ Requisition 3357533 Submitted

Summary	Options
Requisition number 3357533	Print
Requisition status Pending	Recent orders
Cart name Professor Jones' hammers	Return to your home page
Requisition date 10/12/2021	
Requisition total 9.75 USD	
Number of line items 1	

CONGRATULATIONS, you have successfully placed your first order!!!!!!!!!!

Please PRINT your requisition!

Punch-Out Catalog

The punch-out catalog takes you to a specific external vendor that has provided state contract discounts to our Ram Family.

Exercise 2 – Punch-Out Catalog

1. Under Punch-Out, click “CDW-G, Inc”

The screenshot displays the 'Shop' interface. At the top, there is a navigation bar with 'Shop' and 'Shopping Dashboard'. Below this is a search bar and a 'Quick Links' section with a 'Search Contracts' link. The main content area is divided into two columns. The left column contains an 'Organization Message' section with text regarding a 'Mandatory Statewide Term Contract - Maintenance, Repair & Operation Supplies 445B' and 'SU Express Entries & Attached Quotes'. The right column features a 'Showcases' section with a 'Punch-out' category. This category contains a grid of vendor logos: VWR, Fisher Scientific, GRAINGER, AlphaGraphics, BIO-RAD, CDW-G (highlighted with a black arrow), ianacor, inc., DELL, FRSTENAL, Gas Collection Components Products, and ienovo. Below the grid is a 'Forms' section.

2. Click on Electronics (see pictures)

CDW-G PEOPLE WHO GET IT

Search... Q b2b Cart (0)

Hardware Software Services IT Solutions Brands Tech Library

Winston-Salem State University
Winston-Salem State University
Product Categories
Product Configurators
HP CPI Approved

Find my Quote: **Find It**

Find my Order: **Find It**

Winston-Salem State University
Welcome to the Winston Salem State University E-Procurement site homepage. CDW-G is proud to announce it is a Preferred Partner for your IT solutions.
Click here to see our [Monthly Specials](#).

Click on the images below or use the "Search within your contracts" box below to find the specific products or services you're looking for. When navigating, click on the CDW-G logo to return back to the main page.

To place an order for an existing quote:
· Enter your quote number in the "Find my Quote" box below and click "Find"
· Click the "Add to Cart" button next to your quote
· Continue shopping or Click on Transfer Cart to return to the e-procurement system

If you have specific questions on models, institutional standards or other products, please reach out to your dedicated CDW-G Account team at mitchh@cdwg.com.

CDW-G - People Who Get It

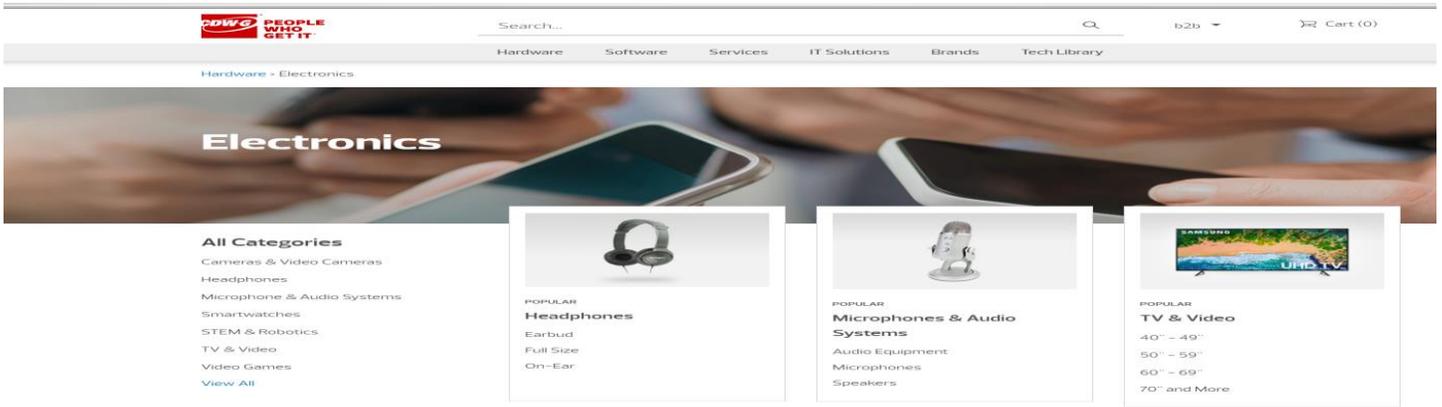
If you need help or have product related questions please contact your CDW-G Account Manager:
Mitch Huffington
CDW-G Executive Account Manager
Toll-Free: (866) 723-1550
Email: mitchh@cdwg.com

Cables Computer Accessories Computers Data Storage Products

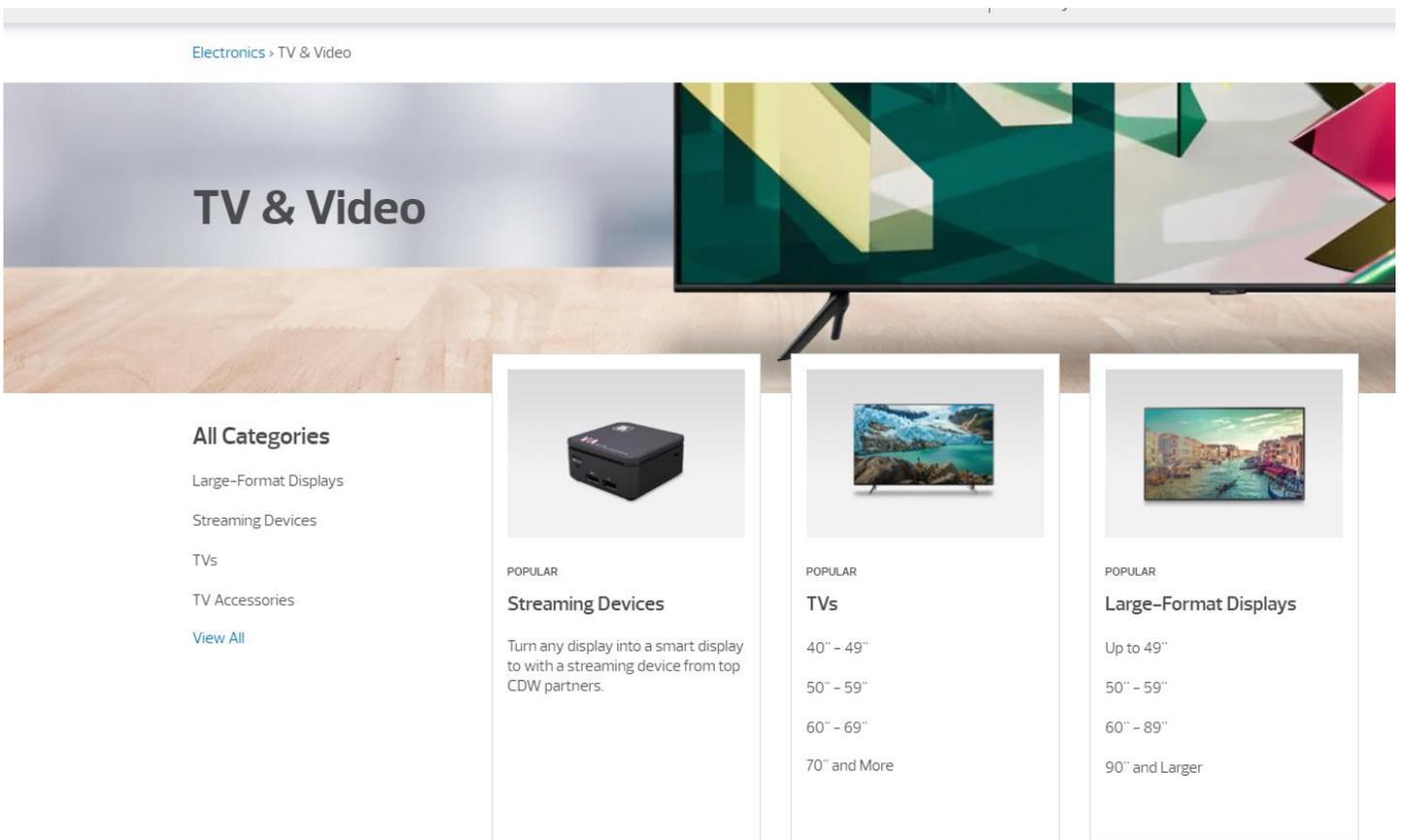
Electronics Memory Monitors & Projectors Networking

Office Equipment & Supplies Power Protection & Management Printers & Print Supplies Servers

Below screen will appear:



4. Click on TVs:



Please note: This is a PunchOut request and each vendor setup will be different.

FYI – If the wrong vendor is clicked, you can cancel and return to home page.

5. Click on any TV

Click “Add to Cart” and review order

The screenshot shows a CDWG website interface. At the top, there is a search bar with 'tv's' entered, a user profile 'b2b', and a cart icon with 'Cart (1)'. Below the navigation bar, there are filters for 'Contract' (E&I CNR01439 Catalog (22), University of NC General Administration (22)) and 'Brand' (LG (6), NEC (5), Panasonic (1), Philips (3), Samsung (5), Sharp (1), Vizio (1)). A 'Screen Size' filter is also present, with 40 inch (1), 42 inch (1), 43 inch (14), and 24 inch (2) selected. The main content area displays two TV products. The first is a Samsung BE43T-H BET-H Pro TV Series - 43" LED-backlit LCD TV - 4K, priced at \$332.63. The second is a Samsung UN43TU8000F 8 Series - 43" Class (42.5" viewable) LED-backlit LCD TV, priced at \$355.29. Both products have an 'Add To Cart' button. A yellow box highlights the 'Add To Cart' button for the first product, and an arrow points from the text 'Click Add to Cart' to this button.

Note: If order needs to be cancelled, please click

[Cancel PunchOut](#)

6. Click “checkout”

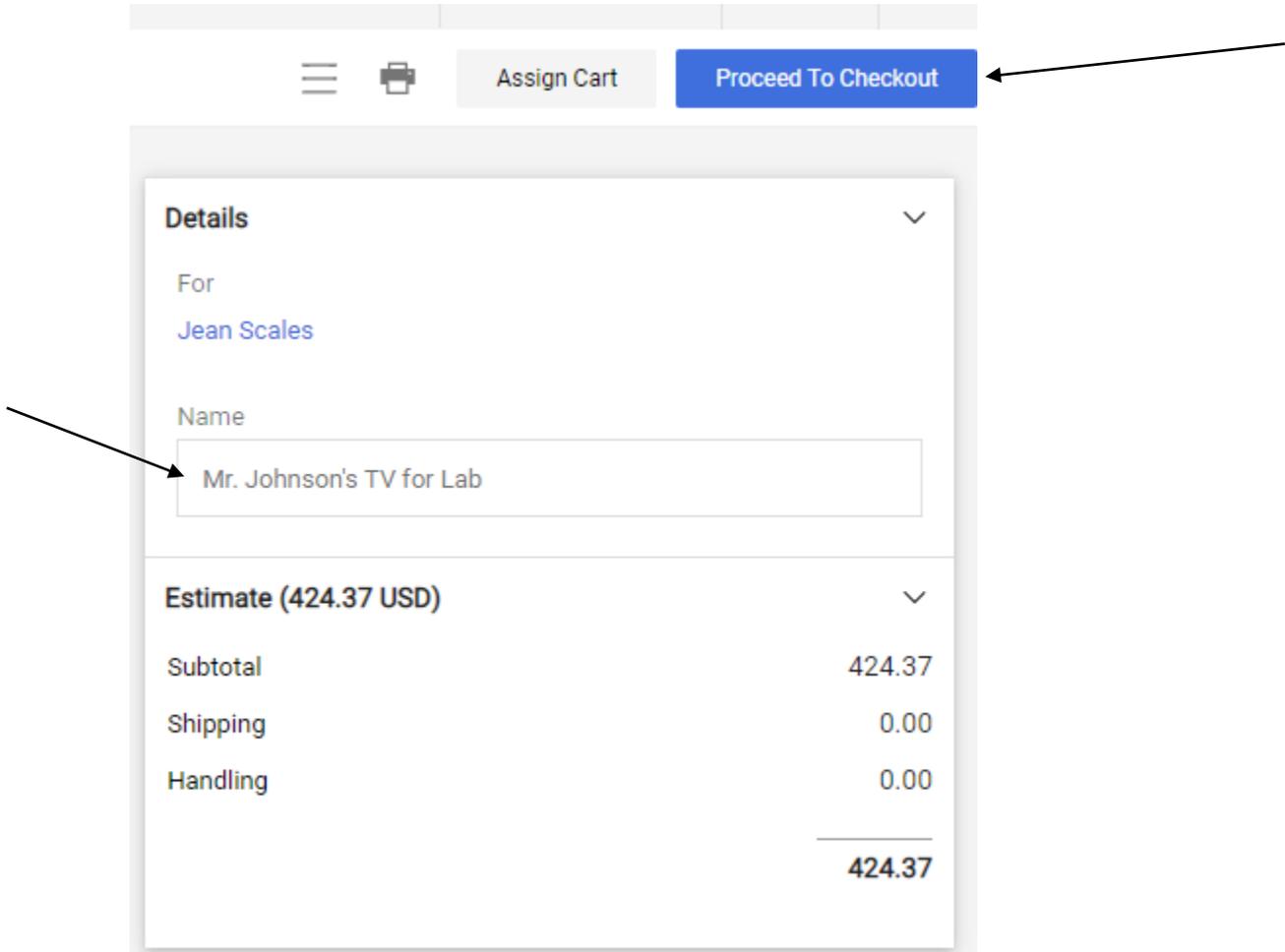
The screenshot shows the CDW shopping cart interface. At the top left is the CDW logo with the tagline "PEOPLE WHO GET IT". A search bar is in the center, and a user ID "b2b" is on the right. Below the navigation bar are links for "Return To Home", "Continue Shopping", and "Shopping Cart". The cart contains one item: a Samsung BE43T-H BET-H Pro TV Series - 43" LED-backlit LCD TV - 4K, priced at \$332.63. An "Order Summary" panel on the right shows a subtotal of \$332.63 and a prominent yellow "Checkout" button. A black arrow points from the instruction above to this button. At the bottom right, there are security logos for BBB Accredited Business and Norton Secured.

7. Click on “Transfer Shopping Cart”

The screenshot shows a confirmation page titled "Transfer Shopping Cart". It features the CDW logo and a "Cancel PunchOut" button in the top right. The main content includes a "Transfer Shopping Cart" button, a thank you message, and instructions to click the button and avoid the browser's back button. A final note mentions a potential recycling fee on invoices.

Note: You are now leaving the Punchout Vendor's catalog and are now back into SU Express system to complete your order.

8. Edit Name of Cart and click **“Proceed to Checkout”**.



NOTE: CHECKOUT PROCEDURES ARE THE SAME FOR ANY OF THE THREE CATALOG CHOICES

9. Go to Accounting Codes and input fund and account codes provided.

Accounting Codes			
Fund	Organization	Program	Account
no value	no value	no value	no value
Required			Required

10. If internal/external notes and attachments are needed, click on eraser

Internal Notes and Attachments		External Notes and Attachments	
Internal Note	<i>no value</i>	Note to all Suppliers	<i>no value</i>
Internal Attachments	Add	Attachments for all suppliers	Add

11. Scroll to top of page, review entire order.

12. Click **Place Order**

The screenshot shows a shopping cart interface. At the top, there is a search bar with the text 'ch (Alt+Q)', a search icon, and a total amount of '424.37 USD'. To the right of the total are icons for a heart, a notification bell with '71', and a user profile icon with '2'. Below this is a navigation bar with a hamburger menu, an eye icon, a printer icon, a question mark icon, an 'Assign Cart' button, and a blue 'Place Order' button. An arrow points from the text 'Click Place Order' to the 'Place Order' button.

Order is complete:

✓ Requisition 3357552 Submitted

Summary	Options
Requisition number: 3357552	Print
Requisition status: Pending	Recent orders
Cart name: Mr. Johnson's TV for Lab	Return to your home page
Requisition date: 10/12/2021	
Requisition total: 424.37 USD	
Number of line items: 1	

NOTE: For audit purposes, please PRINT requisition.

Non-Catalog Items

It is recommended that shoppers purchase from hosted or punch-out catalogs. However, there are times when items are not available from either source. This is when Non-catalog items are chosen.

Exercise 3 – Non-Catalog

1. Click on Non-Catalog item

The screenshot displays a procurement system interface. At the top, there is a navigation bar with the text "Shop • Shopping Dashboard". Below this, a blue header bar contains the word "Shop" and a search bar. The search bar has a dropdown menu with "Simple" and "Advanced" options. To the right of the search bar, there are links for "Go to: Favorites | Forms | Non-Catalog Item | Quick Order" and "Browse: Suppliers | Categories | Contracts | Chemicals". The "Non-Catalog Item" link is highlighted with a blue underline and a black arrow pointing to it from the text "1. Click on Non-Catalog item".

On the right side of the interface, there is a "Quick Links" section with a "Search Contracts" button. Below the navigation bar, there is an "Organization Message" section with the following text:

Mandatory Statewide Term Contract - Maintenance, Repair & Operation Supplies 445B
Grainger is the vendor for Electrical, Lighting, Industrial Supplies & Equipment, Filters & Air Conditioners, Hand & Power Tools, PPE & Safety Supplies. Please refer to state contract 445B for additional information.
If you use another vendor that's less expensive, please provide a quote from Grainger and your selected vendor. Orders will not be approved without proper attachments.
SU Express Entries & Attached Quotes:
*Your quote attached must be identical to your entry in SU Express. Eg. If your quote has 2 itemized items, your entry in SU Express must include 2 itemized items.
*Reference the quote number and State Contract Number in the document text.
If you have any questions please do not hesitate to give us a call.
Purchasing Goods and Services
\$2,500 and Under: Use Procurement Card or Requisition for non-allowable items only
\$2,501 - \$4,999: Attach one (1) quote to order
\$5,000 - \$24,999: Attach three (3) quotes to order
\$25,000 - \$250,000: Formal Bid....Contact Purchasing
Please contact Purchasing Services, if you need training or a refresher training, for SU Express, and Request for Payment at 336.750.2930.
Sincerely,
Purchasing Services

On the right side, there is a "Showcases" section with a green header. It contains two sections: "Showcased Vendors" and "Punch-out". The "Showcased Vendors" section displays logos for VWR International, Fisher Scientific, and Grainger. The "Punch-out" section displays logos for AlphaGraphics, BIO-RAD, CDWG, icamcor, Inc., DELL, FESTIVAL, Gas Conversion Computer Products, and lenovo. Below the "Punch-out" section, there is a "Forms" section with a dropdown arrow.

- Type Carpet Central Inc. as the existing supplier
 Note: If vendor is not listed, contact Purchasing Services.

Add Non-Catalog Item✕

Existing Supplier

Item

Description *	Catalog No. *	Quantity *	Price *	Packaging
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	EA - Each

254 characters remaining

Additional Details

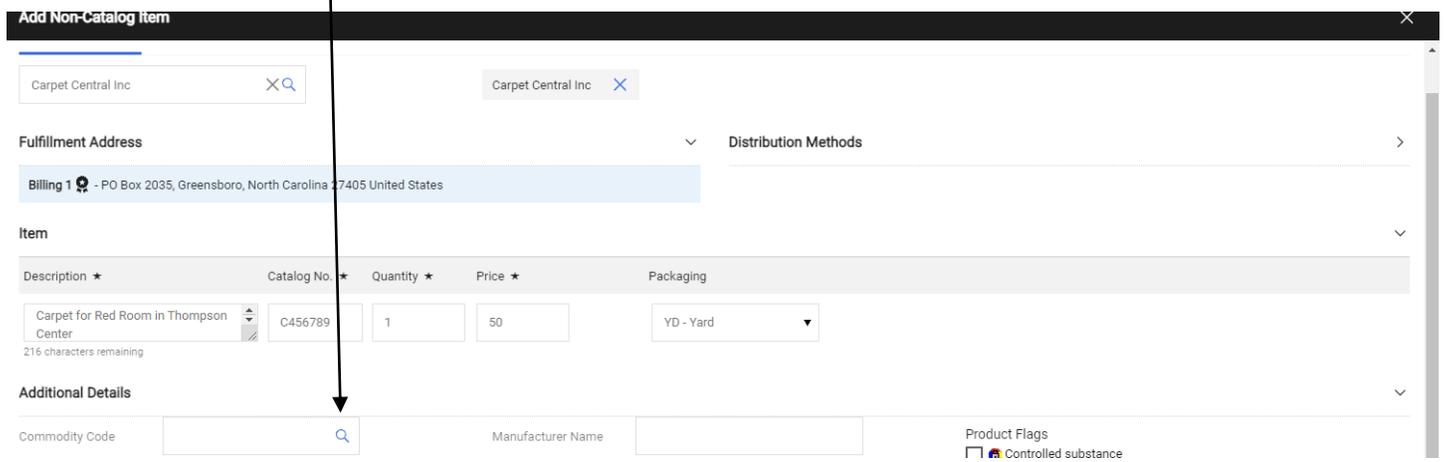
Commodity Code <input type="text"/>	Manufacturer Name <input type="text"/>	Product Flags <input type="checkbox"/> Controlled substance <input type="checkbox"/> Recycled <input type="checkbox"/> Hazardous material <input type="checkbox"/> Radioactive <input type="checkbox"/> Red Minor <input type="checkbox"/> Select Agent <input type="checkbox"/> Toxin <input type="checkbox"/> Energy Star <input type="checkbox"/> Green
Manufacturer Part No <input type="text"/>		

★ Required fields

Fill in all required fields:

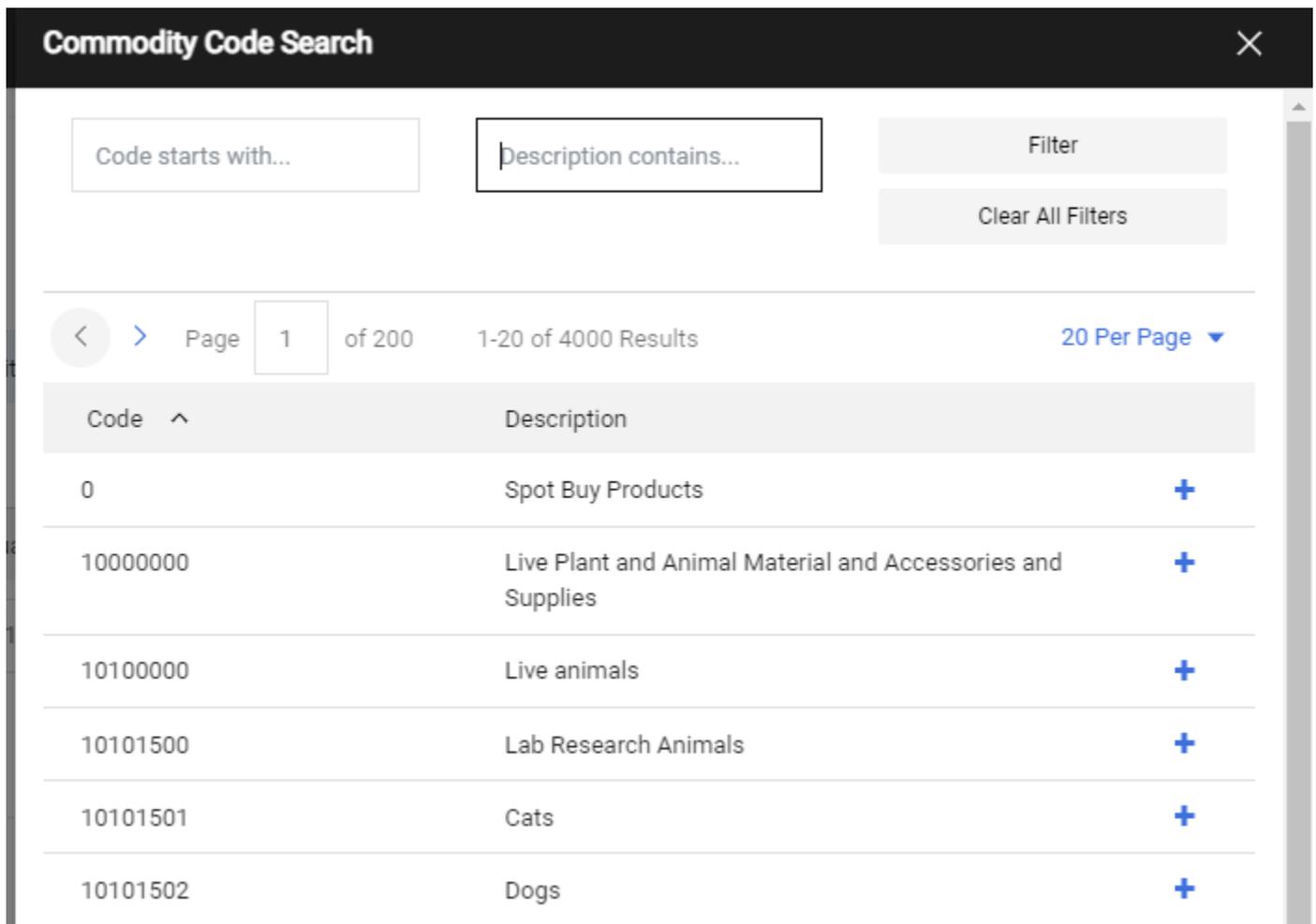
Product Description	Carpet for Red Room in Thompson Center
Catalog No	C456789
Quantity	1
Price Estimate	50.00
Packaging	yd

3. Click search light  next to “commodity code”



The screenshot shows the 'Add Non-Catalog Item' form. At the top, there is a search bar containing 'Carpet Central Inc'. Below this, there are sections for 'Fulfillment Address' (Billing 1: PO Box 2035, Greensboro, North Carolina 27405 United States) and 'Distribution Methods'. The 'Item' section contains a table with columns: Description, Catalog No., Quantity, Price, and Packaging. The current item is 'Carpet for Red Room in Thompson Center' with Catalog No. C456789, Quantity 1, Price 50, and Packaging YD - Yard. Below the table is the 'Additional Details' section, which includes a 'Commodity Code' field with a search icon, a 'Manufacturer Name' field, and 'Product Flags' (Controlled substance).

4. Two code choices will populate, please select Description Contains



The screenshot shows the 'Commodity Code Search' results page. It features a search bar with 'Code starts with...' and 'Description contains...' filters. The 'Description contains...' filter is active. Below the search bar are 'Filter' and 'Clear All Filters' buttons. The results are displayed on page 1 of 200, showing 1-20 of 4000 results. The table lists the following codes and descriptions:

Code	Description	
0	Spot Buy Products	+
1000000	Live Plant and Animal Material and Accessories and Supplies	+
1010000	Live animals	+
10101500	Lab Research Animals	+
10101501	Cats	+
10101502	Dogs	+

5. Type Carpeting and enter:

The screenshot shows the 'Commodity Code Search' interface. At the top, there are two input fields: 'Code starts with...' and 'Description contains...'. The 'Description contains...' field is active. To the right are 'Filter' and 'Clear All Filters' buttons. Below the filters, a pagination bar shows 'Page 1 of 200' and '1-20 of 4000 Results'. A dropdown menu is set to '20 Per Page'. The main table has two columns: 'Code' and 'Description'. The results are as follows:

Code	Description	
0	Spot Buy Products	+
10000000	Live Plant and Animal Material and Accessories and Supplies	+
10100000	Live animals	+
10101500	Lab Research Animals	+
10101501	Cats	+
10101502	Dogs	+

6. Several types of carpeting will appear, select one by clicking “+” that best describes your purchase. Your commodity code will populate

This screenshot shows the 'Commodity Code Search' interface after the search term 'Carpeting' has been entered in the 'Code starts with...' field. The 'Filter' button is now highlighted. The table below shows the following results:

Code	Description	
30161701	Carpeting	+
30161708	Knotted carpeting	+
30161709	Tufted carpeting	+
30161711	Outdoor carpeting	+

A 'Close' button is visible in the bottom right corner of the search window.

7. Product Flag

The screenshot shows the 'Add Non-Catalog Item' form. The 'Existing Supplier' field is 'Carpet Central Inc'. The 'Fulfillment Address' is 'Billing 1 - PO Box 2035, Greensboro, North Carolina 27405 United States'. The 'Item' table has one row: 'Carpet for Red Room in Thompson Center' with Catalog No. 'C456789', Quantity '1', Price '50.00', and Packaging 'YD - Ya...'. The 'Additional Details' section includes 'Commodity Code' '30161701' and 'Manufacturer Part No'. The 'Product Flags' section has a list of checkboxes: 'Controlled substance', 'Recycled', 'Hazardous material', 'Radioactive', 'Rad Minor', 'Select Agent', 'Toxin', 'Energy Star', and 'Green'. An arrow points to the 'Product Flags' header. At the bottom, there are buttons for 'Save', 'Save And Add Another', and 'Close', and a legend for '★ Required fields'.

Description ★	Catalog No. ★	Quantity ★	Price ★	Packaging
Carpet for Red Room in Thompson Center <small>216 characters remaining</small>	C456789	1	50.00	YD - Ya...

Additional Details

Commodity Code: 30161701
Manufacturer Name:
Manufacturer Part No:

Product Flags

- Controlled substance
- Recycled
- Hazardous material
- Radioactive
- Rad Minor
- Select Agent
- Toxin
- Energy Star
- Green

★ Required fields

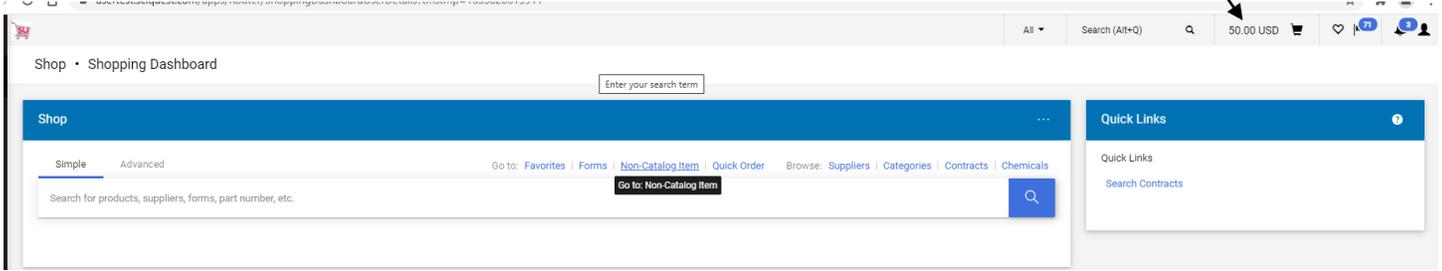
Save Save And Add Another Close

Product Flags Section: If you know that the product is recycled, green, hazardous material, etc., click box next to appropriate product.

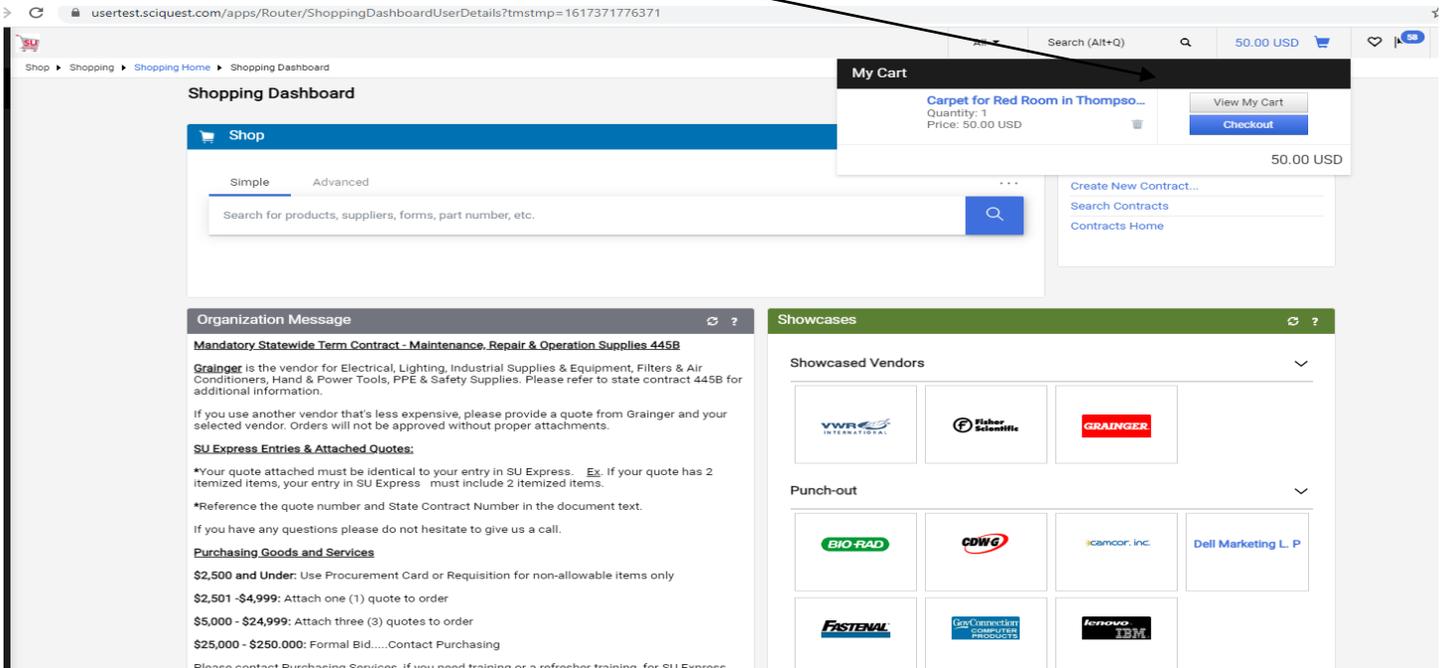
If ordering Multiple items, **click Save and Add Another**. This will allow you to add additional items

Note: If ordering one item, **click Save**

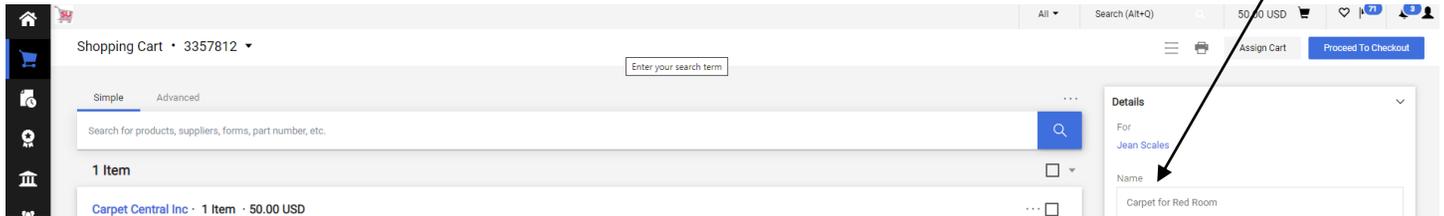
8. If you have completed shopping, click on picture of a cart in top right corner



9. Click "View my Cart"



10. **Name this Cart:** Under Name, rename Cart to something meaningful (ex. Red Room Carpet). Note: Date is not necessary in description, it will automatically populate.



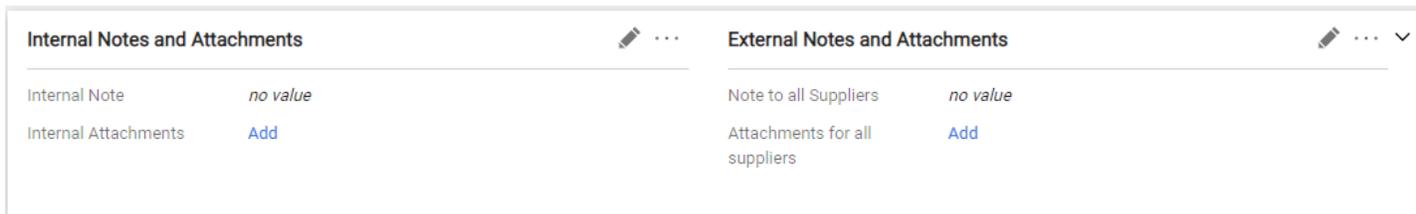
11. Continue with “Proceed to Checkout”

NOTE: CHECKOUT PROCEDURES ARE THE SAME FOR ANY OF THE THREE CATALOG CHOICES

12. Go to Accounting Codes and input fund and account codes provided.

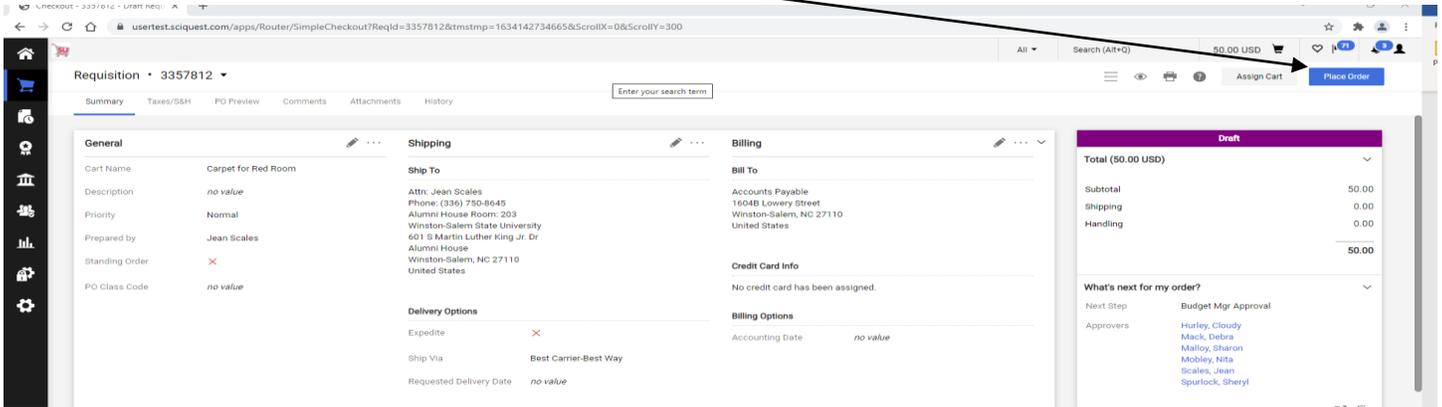


13. If internal/external notes and attachments are needed, click on eraser

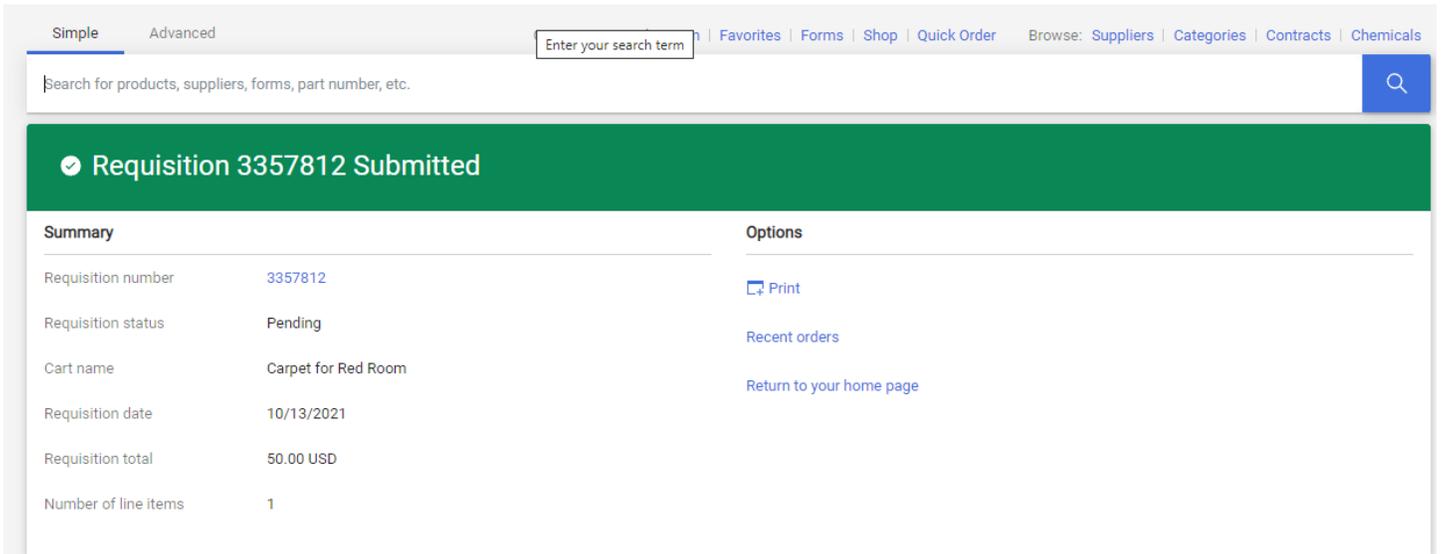


14. Scroll to top of page, review entire order.

15. Select Place order:



16. Once order is placed, it will be given a requisition number.



NOTE: For audit purposes, please PRINT requisition.

Note: For class purposes, record Requisition number to be used in splitting account example for Header Record

SPLITTING FUND CODES

For this exercise, please go to VWR catalog and search for “Divider Tote Box” Place two (2) items in your cart.

1. Click  on top right corner
2. **Name this Cart:** Under Name, rename Cart to something meaningful (ex. Cooler Bags Job Fair). Note: Date is not necessary in description, it will automatically populate
3. Proceed to Checkout
4. Go to Accounting Code
Note: If requisition has a lot of items to be split, you would put the fund that will be used more frequently

Accounting Codes

Fund	Organization	Program	Account
<i>no value</i>	<i>no value</i>	<i>no value</i>	<i>no value</i>
 Required			 Required

5. To split funds per line, Go to line

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1 Tool Tote/Cooler Bag 12 Cans Blue/Black	3JA11	EA	32.70	1 EA	32.70	...

6. Click ...

7. Click Accounting Codes

Override

Supplier

Ship To

Delivery Options

Bill To

Credit Card Info

Accounting Codes

Remove

Add to Favorites

8. Click on the plus sign (+)

Accounting Codes

Fund *	Organization	Program	Account *
110110	30500	101	929000

★ Required fields

Save Changes Close

9. Click on % of Price drop down box. You will see four selections: % of Price, % of Quantity. Amount of Price and Amount of Quantity. The two most frequently used are amount of Price and % of Price.

For this exercise, please select Amount of price.

10. Modify Fund and Account information as needed

Fund *	Organization	Program	Account *	Amount of Price
110110	30500	101	929000	Enter amount
118005	52000	180	929000	Enter amount

Line subtotal: 32.70 USD
Split Total 0.00 USD

11. Note: Total Amount populates

12. Type amounts per fund as needed and click save.

Fund *	Organization	Program	Account *	Amount of Price	
110110	30500	101	929000	16.00	
118005	52000	180	929000	16.70	

Line subtotal: 32.70 USD
Split Total 32.70 USD

13. Notice Account Split on Header Record

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1 Tool Tote/Cooler Bag 12 Cans Blue/Black	3JA11	EA	32.70	1 EA	32.70	

ITEM DETAILS

Manufacturer Name	CLC	Contract:	no value	Internal Note	no value
Manufacturer Part Number	1540	Taxable	×	Internal Attachments	Add
More Information URL	http://www.grainger.com/Grainger...	Capital Expense	×	External Note	no value
UNSPSC	24-11-15-07	Commodity Code	24111507 / Tool bags	Attachments for supplier	Add

[more info...](#)

ACCOUNTING CODES

Values have been overridden for this line

Fund	Organization	Program	Account	Amount of Price
110110 Mass Communications 101	30500 Mass Communications	101	929000 Other Supplies(L4)	16.00 USD
118005 Physical Plant Oper	52000 Facilities Management	180	929000 Other Supplies(L4)	16.70 USD

14. Note: If you have a service requisition, perform split at the Header Record.

Example: Requisition number used from Red Room Carpet

15. Click on Eraser

Fund	Organization	Program	Account	
117026 Purchasing	53200 Purchasing	170	929000 Other Supplies(L4)	

16. Follow above steps 8, 9, and 10

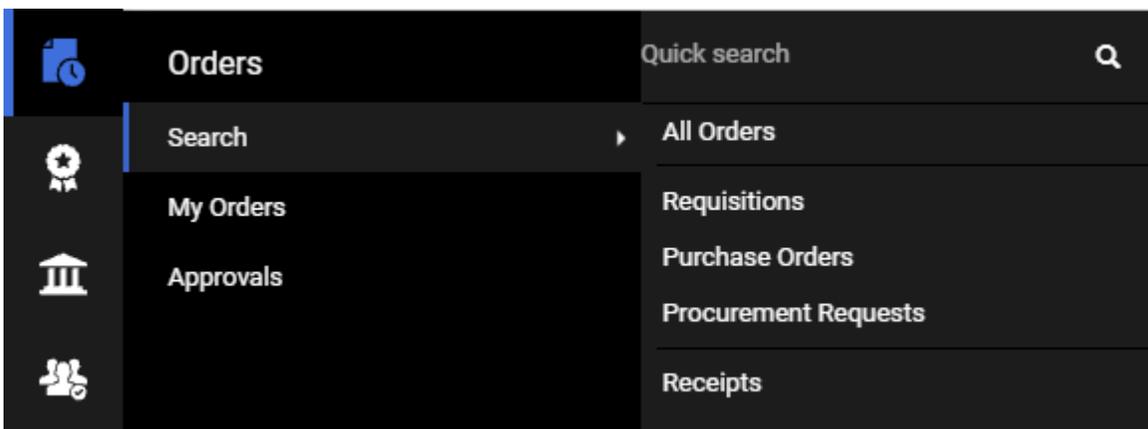
Document Search

Location: Home Page  on Left hand corner

There are 3 methods for document searching:

Method #1:

1. Click on , then click the search light 

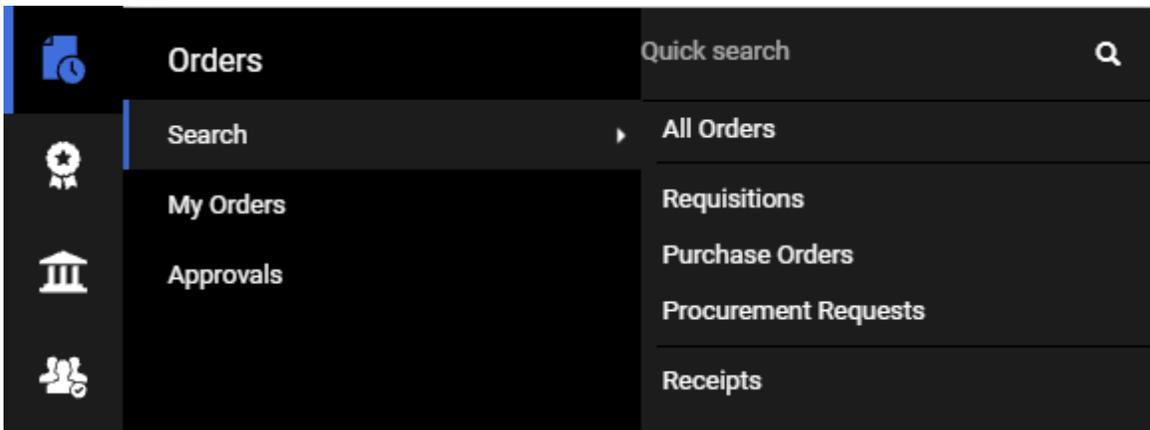


2. Type in your first or last name and all your orders will appear, Supplier Name, Purchase or Requisition number etc.

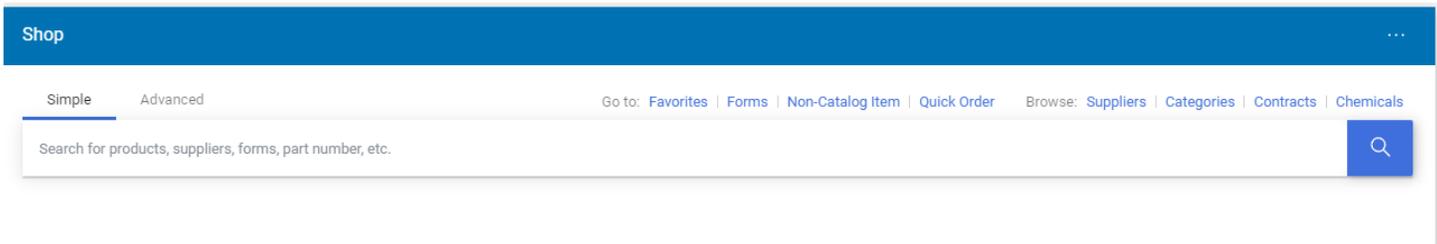
3. You can also utilize:



4. Beside “My Orders”, please select from My Requisitions and/or My Purchase Orders

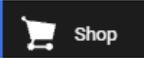


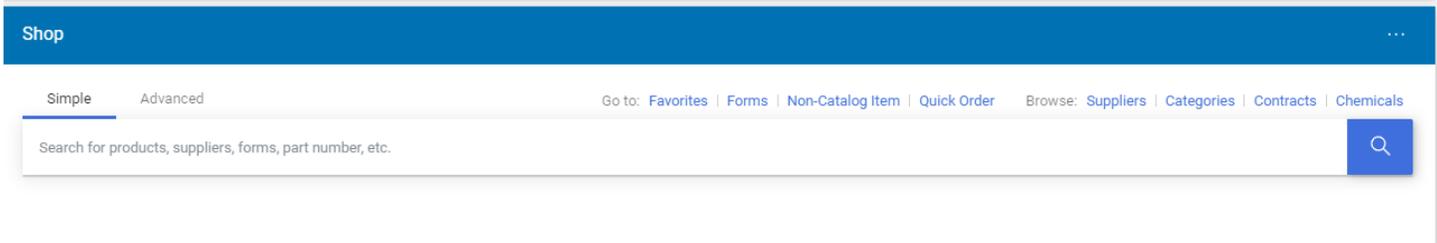
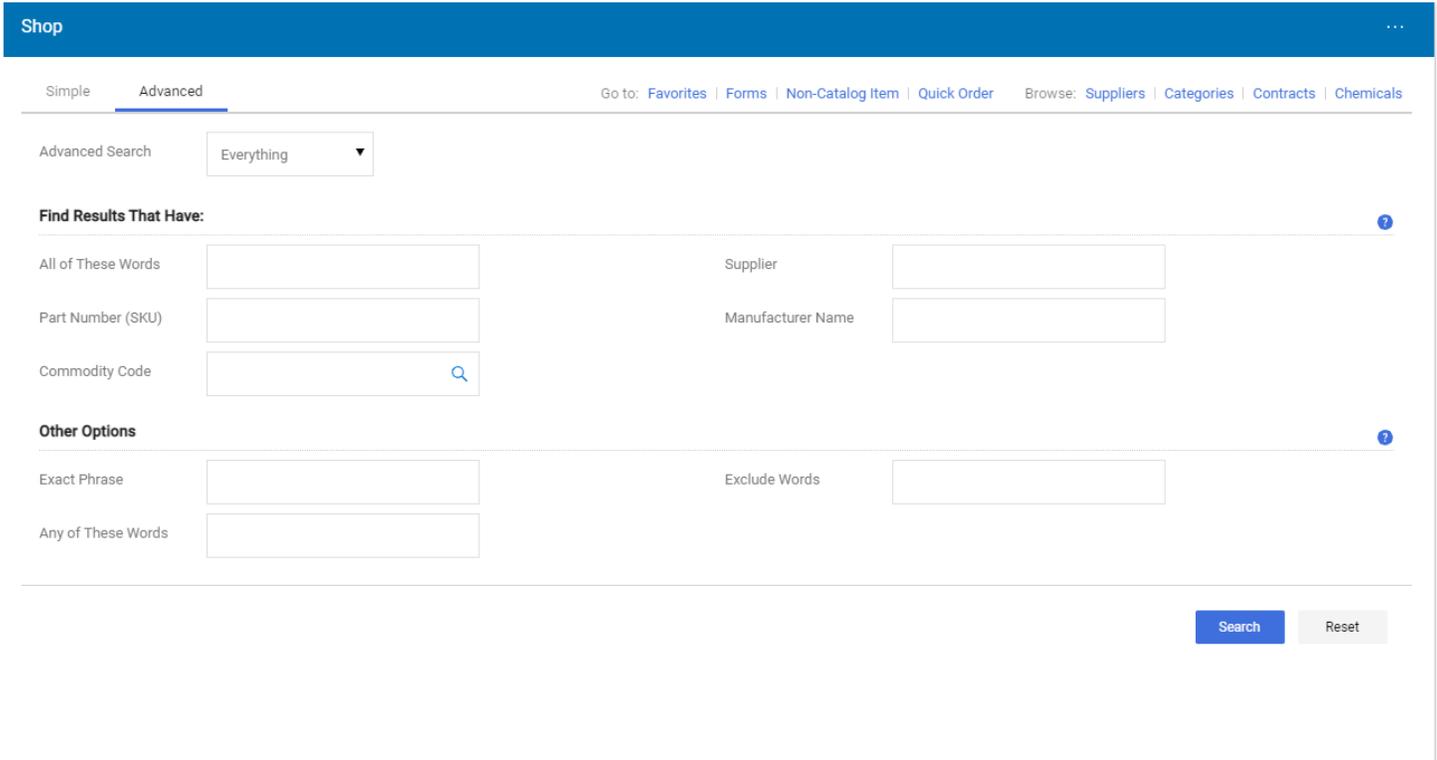
Method #2: Simple is located by clicking  and then Shopping Home or under the word Shop:



1. Simple Method allows you to search by Product, Supplier, Part Number etc.

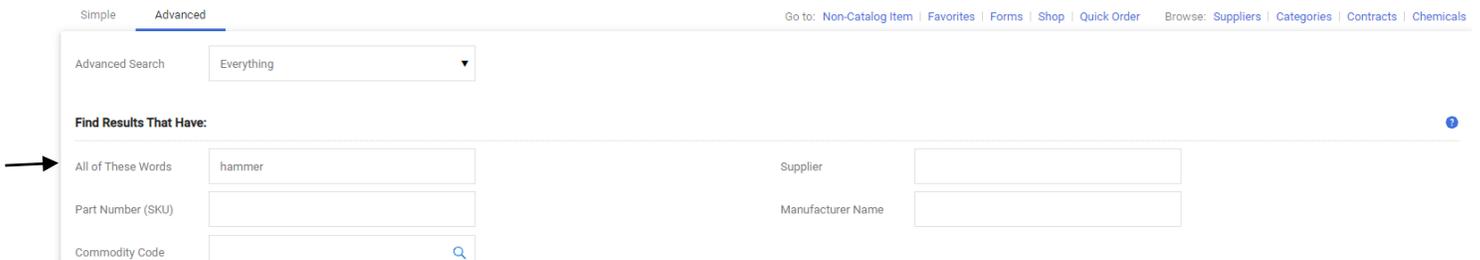
Example: Hammer – All Hammers will display

Method #3: Advanced is located by clicking  and then Advanced Search or under the word Shop:



1. Advanced Method allows you to search by Product, Supplier, Part Number etc.

Example: Beside Find Results that Have:

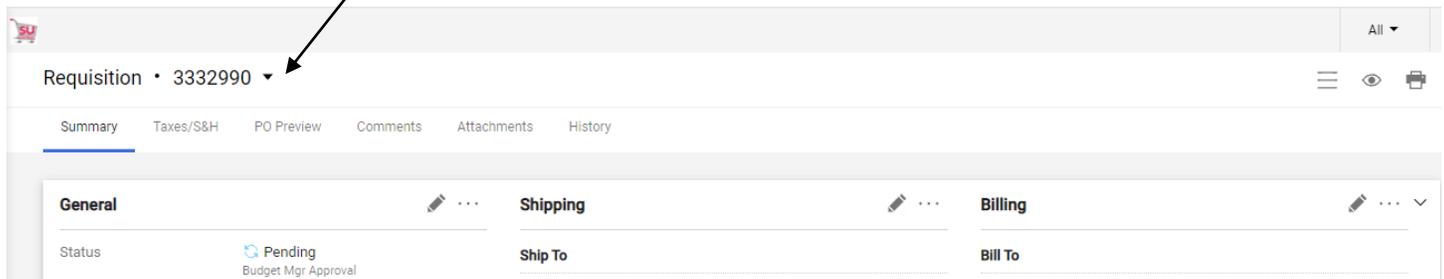


Hammer – All Hammers will display

Copy to Cart

A copy to cart is used to reorder the same items from the same vendor

1. Do a document search and select the requisition for Grainger
2. Click on the Requisition Number to look at requisition
3. Locate the dropdown beside the Requisition Number, select “copy to new cart”.



4. Select Copy to New Cart

[Withdraw Entire Requisition](#)

[Copy to New Cart](#)

[Add Comment](#)

[Add Notes to History](#)

[View My Orders \(Last 90 Days\)](#)

[Continue Shopping](#)

[View Carts](#)

[View Cart return message\(s\)](#)

[See configuration for this requisition](#)

5. A shopping cart with a new Requisition opens. Change the cart name and modify as needed. Next, proceed to checkout.

REVIEW NOTES:

1. Review requisition tabs
 - Summary
 - PO Review
 - Comments
 - Attachments
 - History

2. SU Express production site

REMINDERS:

- Always check your budget prior to submitting your requisition.
- Always check and make sure you have selected the correct address for the vendor.
- Always check and make sure the vendor has a fax number, if there is no fax, make sure Purchasing has updated the vendor file with an email address for PO distribution.
- When you have more than “1” line item, do not split at the header, split at the line.
- Always attach your quotes internally and externally.
- Most importantly, if your purchase is under \$4999.99 and the vendor accepts the P-Card, please use it.

SU Express Issues - Purchasing Staff:

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