# Table of Contents

I. Accessing the System ........................................... 1
II. System Functions ............................................. 4
   a. User Rolls .............................................. 4
   b. Profile Setup .......................................... 6
      i. Shipping Address .................................... 6
      ii. Billing Address ...................................... 9
      iii. E-Mail Preferences ................................ 11
      iv. Funding ............................................. 13
III. Search & Order – Punch Out Vendors ...................... 28
IV. Search & Order – Hosted Vendors .......................... 30
V. Create a NONCatalog Requisition ........................... 32
VI. Completing the Checkout Process ........................... 35
   a. Multiple Funding ....................................... 49
VII. Assigning a Cart ........................................... 54
VII. Additional Functions ....................................... 56
   a. Document search ...................................... 56
   b. Attaching a Document ................................ 58
Accessing the System

**STEP 1:**  Go to the Texas State University home page:  [www.txstate.edu](http://www.txstate.edu)

**STEP 2:**  Select SAP Portal.
Accessing the System

STEP 4:  Select TSUS Marketplace

STEP 5:  Separate browser window will open with the TSUS Marketplace home page.
Accessing the System - Home Page Navigation

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 view of 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
- Retrieves requisitions for approval
- Approves requisitions
- Rejects lines or entire requisition

Role assignments can be changed with submission of SAP Department form to ITAC. To view your assigned role, follow instructions on the next page.
**System Functions - User Roles**

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

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

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

**STEP 4:** Select Assigned Rolls.

**STEP 5:** Assigned Roll appears.
STEP 1: Select your name in the top right part 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
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. (TSU-San Marcos users will select UDC—University Distribution Center).
### System Functions - Profile Setup - 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.
STEP 1: Select your name in the top right part 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
STEP 6: Under the **Bill To** tab, click Select Addresses for Profile button. The **Select Address Template** window will appear.

![Select Addresses for Profile](image)

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

![Select Address Template](image)

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 part 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, Settlements.
**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 - Funding

**STEP 1:** Select your name in the top right part 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.
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 above outlined fields.
Once default settings have been saved, the Codes tab should reflect them.
STEP 1: Select **Create New Value**. Values selection menu appears.

STEP 2: Make selections according to your funding type. *(A, F, K, or S --Do not use P/WBS)*
Select multiple values to generate a drop-down selection list when creating requisitions. Only one category can be selected as Default. Follow STEPS on next page to select a Default.

STEP 3: Click **Add Values**.

STEP 4: Value is added to the table.
System Functions - Profile Setup - Funding

ACCOUNT ASSIGNMENT CATEGORY - DEFAULT SELECTION

STEP 1: Click the hyperlinked Description of the value you added to the table. Edit Existing Value menu appears.

STEP 2: Check the Default box to set this category as the default value for this field.

STEP 3: Click Save.

STEP 4: New default value has been saved.

STEP 5: Click Close to return to Codes tab screen.
**System Functions - Profile Setup - Funding**

**STEP 1:** Select **Create New Value**. Values selection menu appears.

**STEP 2:** If known, enter Fund number in the **Value** field and click **Search**. If unknown, just click **Search**.

**STEP 3:** Select your fund. Select multiple values to generate a drop-down selection list when creating requisitions. Only one category can be selected as Default. Follow STEPS on next page to select a Default.

**STEP 4:** Click **Add Values**.

**STEP 5:** Value is added to table.
STEP 1: Click the hyperlinked Description of the value you added to the table. 

Edit Existing Value menu appears.

STEP 2: Check the Default box to set this number as the default value for this field.

STEP 3: Click Save.

STEP 4: New default value has been saved.

STEP 5: Click Close to return to Codes tab screen.
System Functions - Profile Setup - Funding

STEP 1: Select **Fund** from the drop-down and then select **Create New Value**. New Value & Search for Value menus appear.

STEP 2A: 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 3** then repeat STEPS 1, 2A and 3 for each value.

STEP 2B: If Cost Center is unknown, just click **Search** from the Search for Value menu, make selections, then **Add Values**. Select multiple values to generate a drop-down selection list when creating requisitions. To designate a **Default** value when using the Search for Value menu, follow the STEPS on the next page then proceed to STEP 3.

STEP 3: Click **Save**.

STEP 4: Value is added to table.

STEP 5: Click **Close** to return to Codes tab screen.
STEP 1: Click the hyperlinked Description of the value you wish to make Default. Edit Existing Value menu appears.

STEP 2: Check the Default box to set this number as the default value for this field.

STEP 3: Click Save.

STEP 4: New default value has been saved.

STEP 5: Click Close to return to Codes tab screen.
**System Functions - Profile Setup - Funding**

**INTERNAL ORDER**

**STEP 1:** Select fund from the drop-down and then select **Create New Value**. New Value & Search for Value menus appear.

**STEP 2:** Type Internal Order into the Value field in the New Value menu and click **Search**. If unknown, or you will be entering multiple values, just click **Search**. Values selection menu appears.

**STEP 3:** Select your Internal Order. Select multiple values to generate a drop-down selection list when creating requisitions.

**STEP 4:** Click Add Values.

**STEP 5:** Value(s) added to the table.

**STEP 6:** If you wish to designate a Default Internal Order value that will automatically populate this field when creating a requisition, proceed to next page. If not, click **Close** to return to Code tabs screen.
STEP 1: Click the hyperlinked Description of the value you wish to make Default. Edit Existing Value menu appears.

STEP 2: Check the Default box to set this number as the default value for this field.

STEP 3: Click Save.

STEP 4: New default value has been saved.

STEP 5: Click Close to return to Codes tab screen.
System Functions - Profile Setup - Funding

**STEP 1:** Select Create New Value. Search for Value menu appears.

**STEP 2:** Type G/L code into the Value field and click Search. If unknown, or you will be entering multiple values, just click Search. Values selection menu appears.

**STEP 3:** Select your G/L code. Select multiple values to generate a drop-down selection list when creating requisitions.

**STEP 4:** Click Add Values.

**STEP 5:** Value(s) added to the table.

**STEP 6:** 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.**
**System Functions - Profile Setup - Funding**

**STEP 1:** Select Create New Value. Search for Value menu appears.

**STEP 2:** Type G/L code into the Value field and click Search. If unknown, or you will be entering multiple values, just click Search. Values selection menu appears.

**STEP 3:** Select your G/L code. Select multiple values to generate a drop-down selection list when creating requisitions.

**STEP 4:** Click Add Values.

**STEP 5:** Value(s) added to the table.

**STEP 6:** 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.**
STEP 1: Select Create New Value. Search for Value menu appears.

STEP 2: Type Storage Location code into the Value field and click Search. If unknown, or you will be entering multiple values, just click Search. Values selection menu appears.

STEP 3: Select your Storage Location. Select multiple values to generate a drop-down selection list when creating requisitions.

STEP 4: Click Add Values.

STEP 5: Value(s) added to the table.

STEP 6: If you wish to designate a Storage Location value that will automatically populate this field when creating a requisition, proceed to next page. If not, click Close to return to Code tabs screen.
System Functions - Profile Setup - Funding

**Storage Location - Default Selection**

**STEP 1:** Click the hyperlinked Description of the value you wish to make Default. **Edit Existing Value** menu appears.

**STEP 2:** Check the **Default** box to set this code as the default value for this field.

**STEP 3:** Click **Save**.

**STEP 4:** New default value has been saved.

**STEP 5:** Click **Close** to return to Codes tab screen.
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.
**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 select Add to Cart.
Search & Order - Hosted Vendors

STEP 4: After all items are added, select the link that says ___ item(s) added, view cart.

STEP 5: Based on your assigned role, Select Proceed to Checkout or Assign Cart.
Create a NONCATalog Requisition

**STEP 1:** Select 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.**
Create a NONCATalog Requisition

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**. Select 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. Select 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 NONCATalog Requisition

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

STEP 7: If you are ready to checkout, select 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)

*If Shopper can complete required fields, they can Proceed to Checkout.
Completing the Checkout Process

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.

**General Tab**

**STEP 1:** Usually no action is necessary. Be aware of any alerts in the beige box.

**STEP 2:** Select **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.
Completing the Checkout Process - Shipping Tab

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

**STEP 2:** 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 click here link.**

**If you have designated a list of favorite/default Ship To addresses when setting up defaults in your profile (see Profile Setup section) 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 section.
Completing the Checkout Process - Billing Tab

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

**STEP 2:** Select **BillTo** from drop-down menu.

**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.

STEP 3: Enter 4-digit **Storage Location** code, select from favorite/defaulted profile values, or select from all values. To designate a default **Storage Location**, see **Profile Setup section**.

STEP 4: Click **Save**.

STEP 5: Click **Required field** under G/L Account. Accounting Codes menu opens. Proceed to next page to complete Asset entry.
Completing the Checkout Process - Accounting Codes Tab

**STEP 6:** Type in G/L number, select from favorite/defaulted profile values, or select from all values list. To designate a default G/L number, see Profile Setup section. **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:** Enter Fund.

**STEP 8:** Based on Funding, enter either Cost Center or Internal Order number. See Multiple Funding section for instructions on splitting line item funding.
Completing the Checkout Process - Accounting Codes Tab

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 favorite/defaulted profile values, or select from master value list. To designate a default Storage Location, see Profile Setup section.

STEP 4: Click Save.

STEP 5: Click Required field under G/L Account. Accounting Codes menu opens. Proceed to next page to complete Cost Center entry.

Accounting Codes is the most important section in the checkout process!
Completing the Checkout Process - Accounting Codes Tab

STEP 6: Type in G/L number, select from favorite/defaulted profile values, or select from master value list. To designate a default G/L number, see Profile Setup section.

STEP 7: Enter Fund. (Cost Center funds begin with either 1 or 2)

STEP 8: Enter Cost Center number. **Internal Order field should be blank when using K as the Account Assignment Category.

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 favorite/defaulted profile values, or select from master value list. To designate a default Storage Location, see Profile Setup section.

STEP 4: Click Save.

STEP 5: Click Required field under G/L Account. Accounting Codes menu opens. Proceed to next page to complete Cost Center entry.
Completing the Checkout Process - Accounting Codes Tab

**INTERNAL ORDER**

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

<table>
<thead>
<tr>
<th>7</th>
<th>8</th>
<th>6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fund</td>
<td>Cost Center</td>
<td>Internal Order</td>
</tr>
<tr>
<td>Select from profile values...</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Select from all values...</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Required field</td>
<td></td>
<td></td>
</tr>
<tr>
<td>WBS Element</td>
<td>G/L Account</td>
<td>Asset</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**STEP 6:** Type in G/L number, select from favorite/defaulted profile values, or select from master value list. To designate a default G/L number, see **Profile Setup section**.

**STEP 7:** Enter **Fund**. (Internal Order funds begin with either 7 or 8.)

**STEP 8:** Enter **Internal Order** number.

**Cost Center field should be blank when using F as the Account Assignment Category.**

**STEP 9:** Click **Save**.

See **Multiple Funding section** for instructions on splitting line item funding.
Completing the Checkout Process - Accounting Codes Tab

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. To designate a default Storage Location, see **Profile Setup section**.

STEP 4: Click **Save**.

STEP 5: Click **Required field** under G/L Account. Accounting Codes menu opens. Proceed to next page to complete Cost Center entry.
Completing the Checkout Process - Accounting Codes Tab

**STEP 6:** Type in G/L number, select from favorite/defaulted profile values, or select from master value list. To designate a default G/L number, see Profile Setup section.

**STEP 7:** Enter Fund.

**STEP 8:** Enter Cost Center and Internal Order numbers.

**STEP 9:** Click Save.

See Multiple Funding section for instructions on splitting line item funding.
Completing the Checkout Process - Internal/External Notes & Attachments

**STEP 1:** Select either **External** or **Internal Notes and Attachments** tabs. These are 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:** Select **add attachment...** hyperlink.

**STEP 3:** Select **Browse.**

**STEP 4:** Choose file from saved location.

**STEP 5:** Click **Save.**
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.
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.

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

**STEP 2:** Select and save **Account Assignment Category** and **Storage Location** fields. (See Completing the Checkout Process - Accounting Codes Tab section for reference.)
STEP 3: In the header area at the top of the Accounting Codes tab, click the second edit button. Accounting Codes pop-up menu appears.
Completing the Checkout Process - Multiple Funding

**STEP 4:** Click **add split.** Second row of code fields appears.

**STEP 5:** Selection can only be split by percentage. If you need to split by a certain amount, you must do this by line item.

**STEP 6:** Complete G/L Account, **Fund, Cost Center, and/or Internal Order fields.** (see Completing the Checkout Process - Accounting Codes Tab section for reference)

**STEP 7:** Enter the percentage the cart will be split by.

**STEP 8:** Repeat **STEPS 4-6** if you will be splitting by 3 or more fundings.

**STEP 9:** Click **Save** when all splits have been added.
Completing the Checkout Process - Multiple Funding

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

**STEP 2:** Select and save **Account Assignment Category** and **Storage Location** fields.
(see Completing the Checkout Process - Accounting Codes Tab section for reference)

**STEP 3:** In the *line item area* at the bottom of the Accounting Codes tab, click the *second edit* button—right above **Supplier subtotal**. **Accounting Codes pop-up menu appears.**

**Note:** Do not click the edit button that is next to **Asset Sub-Number**. This will not allow you to modify how to split the line.

![Accounting Codes Tab Image](image-url)
Completing the Checkout Process - Multiple Funding

**STEP 4:** Click **add split**. Second row of code fields appears.

**STEP 5:** Select how you would like to split the line.

**STEP 6:** Complete G/L Account, **Fund**, **Cost Center**, and/or **Internal Order** fields.
(see Completing the Checkout Process - Accounting Codes Tab section for reference)

**STEP 7:** Depending on what you selected in **STEP 5**, enter the percentage, amount of price, or amount of quantity in the fields below the drop-down menu.

**STEP 8:** Repeat **STEPS 4-6** if you will be splitting by 3 or more fundings.

**STEP 9:** Click **Save** when all splits have been added.

**STEP 10:** Repeat **STEPS 3-9** to add multiple funding splits to other cart lines.
Assigning a Cart

**STEP 1:** Add one or more items to your cart.

**STEP 2:** In the upper right corner, click Assign Cart.

**STEP 3:** Select **Search for an assignee** link at top of the Assign Cart menu.

**STEP 4:** Enter the last name of the Requisitioner and click Search.
Assigning a Cart

**STEP 5:** Click [select] hyperlink to choose desired user.

<table>
<thead>
<tr>
<th>Name</th>
<th>User Name</th>
<th>Email</th>
<th>Phone</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gordon, Shonte</td>
<td>SN22</td>
<td><a href="mailto:SN22@TXSTATE.EDU">SN22@TXSTATE.EDU</a></td>
<td></td>
<td>[select]</td>
</tr>
<tr>
<td>Gordon, Shonte</td>
<td>sn22</td>
<td><a href="mailto:sn2@txstate.edu">sn2@txstate.edu</a></td>
<td>+1 (512) 245-2512</td>
<td>[select]</td>
</tr>
<tr>
<td>Gordon, Stephen</td>
<td>SG07</td>
<td><a href="mailto:SG07@bstate.edu">SG07@bstate.edu</a></td>
<td>+1 (512) 245-2111</td>
<td>[select]</td>
</tr>
<tr>
<td>Gordon Sosby, Karen</td>
<td>KG02</td>
<td><a href="mailto:KG02@TXSTATE.EDU">KG02@TXSTATE.EDU</a></td>
<td>+1 (512) 245-2111</td>
<td>[select]</td>
</tr>
</tbody>
</table>

**STEP 6:** Click Assign. You should then see the person’s name whom you are assigning the cart to in the Assign Cart box.

Note: After a cart is submitted, it can be viewed via History. Prior to being submitted, the cart can be viewed in Draft Carts and can be unassigned (withdrawn) if needed.
**STEP 1:** There are two ways that an assignee can find assigned carts:

- **Shopping Cart Information**
  
  **Congratulations! Your cart was successfully assigned for further review.**

  At this point, you can view the cart in your draft carts list and can unassign it, if needed, until submitted by the assignee. After a cart is submitted by the assignee, you can view it via requisition history search.

  Here is a brief summary of the requisition you have assigned:

  - Requisition number: 36767534
  - Cart name: 2013-02-05 BNB57 01
  - Requisition total: 249.99 USD
  - Number of line items: 1

  What would you like to do next? Here are links to some common actions.

  - Search for another item
  - Check the status of an order
  - Return to your home page
  - Create new draft cart
Additional Functions - Document Search

Document Search can be used to locate previous Purchase Orders and Requisitions, as well as run various reports.

**STEP 1:** Select **Orders & Documents** from the side navigation menu.

**STEP 2:** Select **Search Documents**. **Search Documents** page appears.

---

1. Document Search can be used to locate previous Purchase Orders and Requisitions, as well as run various reports.
2. Select **Orders & Documents** from the side navigation menu.
3. Select **Search Documents**. **Search Documents** page appears.
Additional Functions - Document Search

Search for Purchase Order or Requisition by Number

STEP 1: From Search drop-down menu, select either Purchase Order or Requisition.

STEP 2: Enter Purchase Order or Requisition number into Purchase Order/Requisition Number(s) search box.

STEP 3: Hit Enter.

STEP 4: Select hyperlinked Purchase Order or Requisition number to view details.
Additional Functions - Attaching a Document

**STEP 1:** While in an Active Cart, select **Proceed to Checkout.**

**STEP 2:** Select either **External** or **Internal Notes and Attachments** from the workflow.  **Internal attachments are NOT seen by the vendor.**

**STEP 3:** Select **add attachment...** hyperlink.

**STEP 4:** Select **Browse.**

**STEP 5:** Choose file from saved location.

**STEP 6:** Click **Save.**