Buy@Duke
Step-by-Step Guide

Table of Contents

Overview of Buy@Duke **2**

To Access Buy@Duke **5**

Setting Personalizations – Defaults, Attributes, and Team Members **6**

Shopping For Goods and Services **15**
- **Creating a Shopping Cart** 15
- **Selecting Items from Supplier Punch-Out Catalogs** 19
- **Selecting Items from Hosted Supplier Catalogs** 26
- **Live Price Plus – Search Functionality – Coming Soon** 34
- **Selecting Text (Non-Catalog) Items** 36
- **Creating a Standing Order Shopping Cart** 45

Functions to Refine Carts **48**
- **Splitting Cost of Goods/Services between Two or More Cost Objects** 48
- **Special Handling: Creating a Confirming Order-Bill Pay (Pay Invoice)** 51
- **Special Handling: New Vendor** 53
- **Creating a Personal Values List** 55
- **Adding an Ad Hoc Approver or Reviewer** 61

Working with Completed Carts **64**
- **Checking the Status of Carts** 64
- **Changing View of Carts in Work List** 69

Goods Receipt and Return **72**
- **Entering Goods Receipt/Confirmation Status** 72
- **Canceling Goods Receipt Confirmation** 76
- **Goods Return** 80

Submitting Carts **84**

Frequently Asked Questions – Quick Reference Steps **90**
- **How Do I Set or Edit a Delivery Address?** 90
- **How Do I Create or Edit My Personal Value List (PVL) for the Delivery Address?** 96
- **What is the Best Way to Use the Shopping Carts All Inclusive Tab?** 100
- **What Do I Do if My Cart Did Not Return from the Buy@Duke Marketplace?** 103
- **How Do I Look Up a Vendor and Add That Vendor to My Personal Value List When Creating a Text Order?** 104
- **How Do I See Notes Associated With a Shopping Cart?** 106

Appendices **108**
- **Glossary** 108
- **Special Procedures** 111

Revised Date: February 8, 2024

Overview of Buy@Duke

Buy@Duke is the web-based tool used by many in the Duke community to purchase goods and services. It is a component of the SAP enterprise system. It is used by the University and School of Medicine/Nursing, as well as many PDC clinics and a few select areas of Duke University Health System.

There are three roles that are assigned to those who use Buy@Duke:

1. **Shopper**
   - Selects items and places them in a shopping cart
   - May or may not assign financial information (cost objects, G/L accounts)
   - Sends shopping cart to Submitter when shopping is complete
2. **Submitter**
   - Reviews and edits individual or team shopping carts
   - Assigns or verifies financial information
   - May select items and place them in a shopping cart
   - Submits shopping carts to supplier or sends carts into workflow for approval
3. **Approver**
   - Provides final department approval of shopping carts
   - Reviews shopping carts for allocability, allowability, and reasonableness when sponsored research funds are used

Shopping Options

Using Buy@Duke, Shoppers and Submitters will create shopping carts, selecting items using four options in the system:

1. **Supplier Punch-Out Catalogs**
   - Shoppers and Submitters connect directly to a supplier's electronic catalog via the Buy@Duke Marketplace.
   - Pricing and descriptions are maintained by the supplier. Pricing reflects Duke-contracted prices.
   - Each website is maintained by the supplier and will look and navigate differently.
2. **Hosted Supplier Catalogs**
   - Suppliers provide product listings and Duke-negotiated pricing for items in these electronic catalogs.
   - Prices and descriptions are updated and reviewed by Procurement and Supply Chain Management (Procurement) staff members.
   - Users can maintain "favorites" lists, making frequently-purchased items easier to select.
   - Allows easy browsing across multiple suppliers.
   - Allows easy comparisons of prices and features.
   - Duke-contracted prices are updated automatically, so items may be saved as favorites for later use.

Overview of Buy@Duke Continued…

3. **Non-Catalog (Text) Items**
   - Shoppers and Submitters may order goods and services that (1) are not found in either a Hosted or a Punch-Out catalog or (2) can be found in a Marketplace catalog, but the Shopper or Submitter has a special supplier quote.
   - Item descriptions and supplier information are entered manually as text orders that are based on supplier quotes and other information provided by the supplier.
   - Shoppers and Submitters may request payment for invoices by designating a cart for Special Handling as a Confirming Order.

4. **Duke Technology Center Managed Catalogs**
   - Shoppers and Submitters may order from a variety of computer vendors through the Duke Technology Center. Specific guidance using Buy@Duke for Duke Technology Center orders can be found in the Buy@Duke – Computer Technology Purchases Quick Reference Guide.

Team Concept

Departments may use the team shopping concept to order goods and services. When a Shopper creates a cart, other Shoppers who have been designated as Team Members will be able to review and add items to the cart. Once the cart has been completed, the team's Submitter will review the items in the cart, assign the proper accounting if needed, and submit the cart into workflow for approvals. Submitters may also create their own carts or add items to carts they review. Shoppers will create and maintain a list of those Team Members who will have access to their carts.

Note: *Contact your unit's business office to determine if team shopping carts are used in your area.*

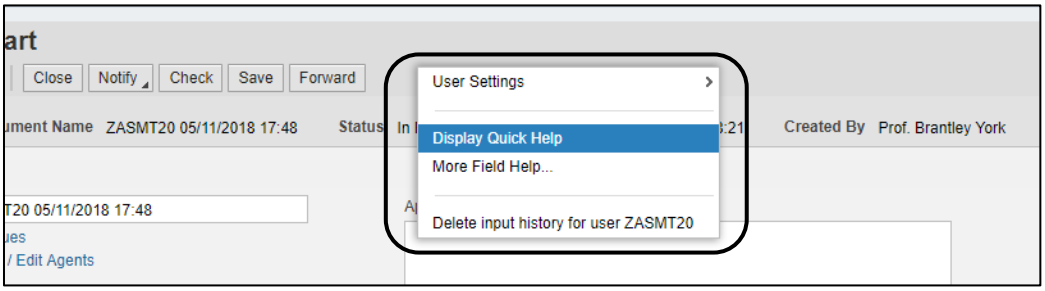
Overview of Buy@Duke Continued…

Built-In Help

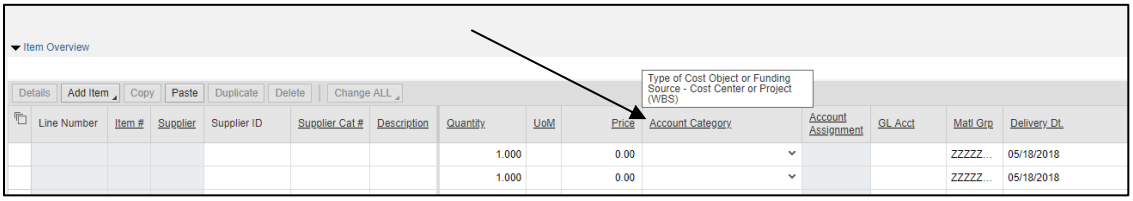
Most of the buttons, links, and columns in Buy@Duke shopping carts are equipped with **Tool Tips** and **Quick Help**. Tool Tips are short text descriptions of the functions that a button or link perform. Some Tool Tips display the keystroke equivalent of the action. Quick Help provides a more detailed description of some buttons and columns that are available using Tool Tips, and it is recommended you use it.

To see Tool Tips, place your pointer over the button or link and allow it to rest there for a moment.

To enable Quick Help, right click in a blank area of the screen. In the resulting menu, select Display Quick Help.



A line will appear under the text of those buttons and column headings that have Quick Help.

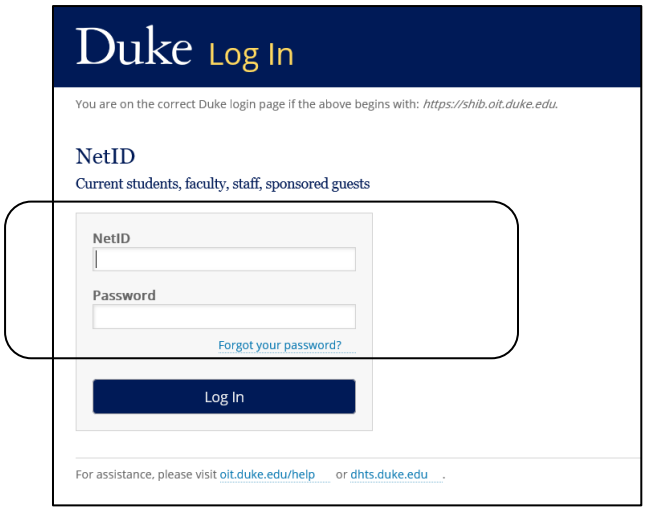


Once Quick Help is enabled, view the detailed descriptions by placing your pointer over the underlined button or column heading and allow it to rest for a moment.

To disable Quick Help, right click in a blank area of the screen and select Hide Quick Help.

To Access Buy@Duke

1. Open a system-supported web browser and enter the URL https://work.duke.edu to go to the Duke@Work web site.

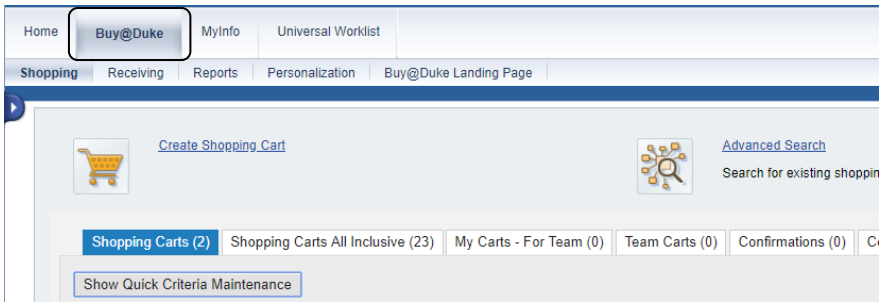


2. In the resulting NetID Services screen, enter your **NetID** and **Net ID Password**.

3. Use **Multi-Factor Authentication** as directed.

Note: *Be sure to **allow pop-up windows from this website (work.duke.edu)** in your web browser. Check with your network administrator to allow pop-up windows.*

4. On the Duke@WORK screen, select the **Buy@Duke** tab.

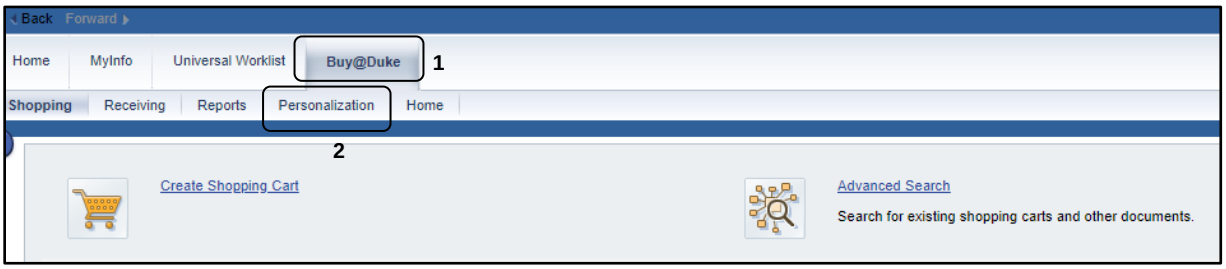


Note: *If you do not have the Buy@Duke tab, you do not have an assigned role in Buy@Duke. If you should be creating purchase orders, contact your supervisor or the Security Initiator for your business unit.*

Setting Personalizations – Defaults, Attributes, and Team Members

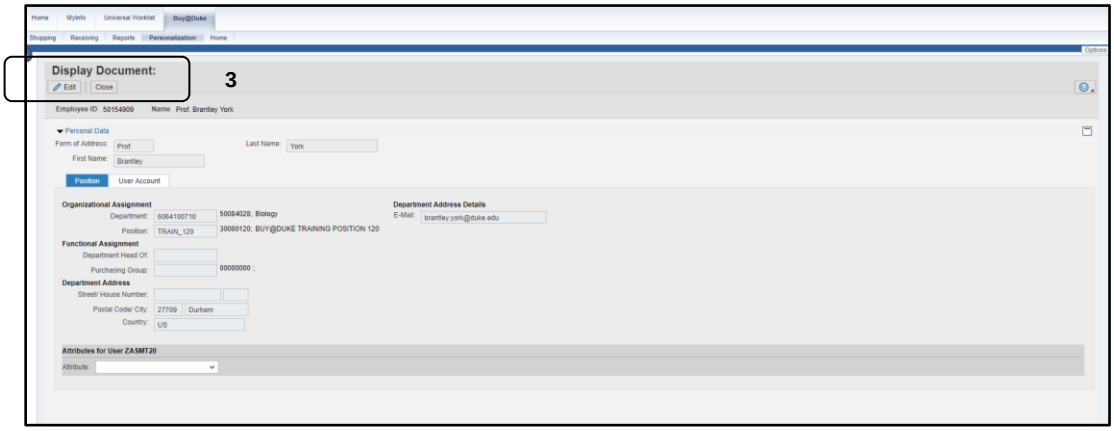
Before Shoppers and Submitters begin working in Buy@Duke, personalizations should be set. These can be set by the individual Shopper or Submitter or maybe set by a department administrator. Setting personalized defaults significantly simplifies the process of creating a shopping cart. Shoppers and Submitters are ***strongly encouraged*** to set ***all*** personalizations recommended below before creating shopping carts.

1. Select the **Buy@Duke** tab.



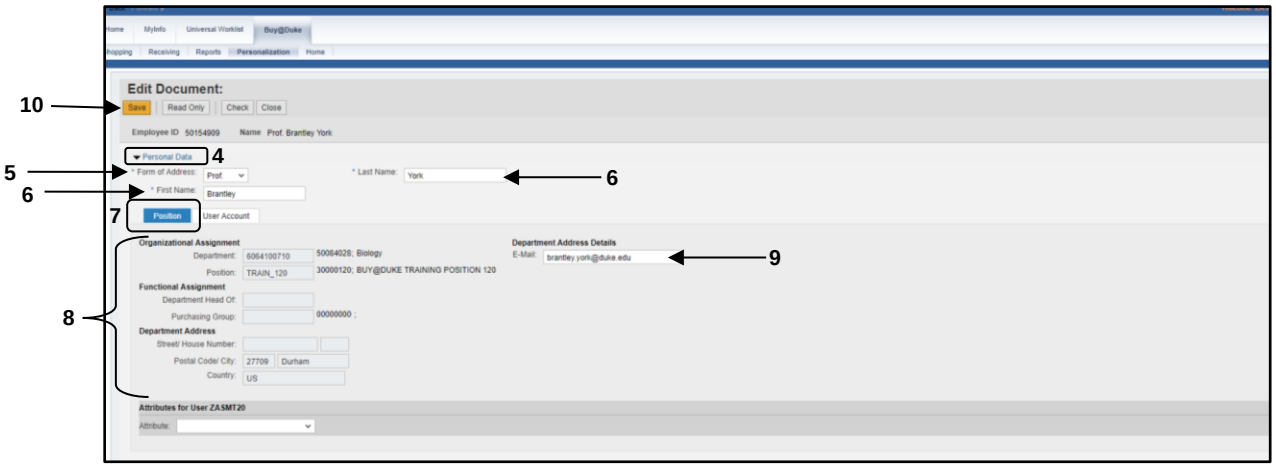
2. Select the **Personalization** page. This opens the **Display Document:** screen.

3. On the *Display Document:* screen, select **Edit** to switch to the edit mode.



Setting Personalization Continued…

4. Review the **Personal Data** section and note the following:
   - The asterisks next to certain fields indicate that you ***must*** enter information in those fields.
   - Confirm your email address.
   - Be sure to save the information you have entered when finished.



5. To enter the **Form of Address**, select the drop-down button and make the preferred selection from the list. **Required Field**

6. Check your name in the **First Name** and **Last Name** fields. If you need to change either of these, make the correct entries. **Required Fields**

7. Ensure that the **Position** tab is selected.

8. Notice that the **Organizational Assignment** fields contain defaulted values. This information was set when your user account was created. Missing information is unnecessary and does not need to be completed.

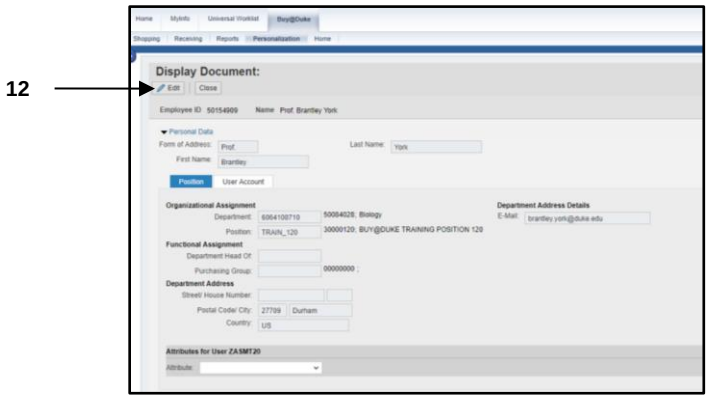
9. Verify your email address and correct the address if needed.

10. Once you've entered all the required fields in the Personal Data section, select the **Save** button.

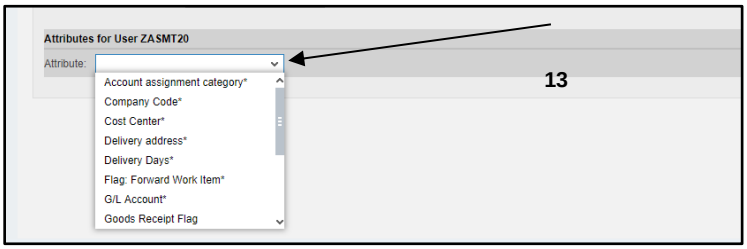
Setting Personalization Continued…

11. Once your Personal Data fields are updated and saved, set your **Attributes.** Review the points below about Attributes.
    - **Selecting and saving values for the applicable Attributes will save you a great deal of time later.**
    - Attributes represent certain fields that must be entered on a shopping cart. **See the table on the next page for a list of Attributes and descriptions**.
    - The purpose of Attributes is to create a default standard value for a field that will automatically populate that field in the shopping cart and save keystrokes.
    - In addition, multiple values may be entered for some Attributes and those values will populate a **Personal Value List (PVL)** for the field in each shopping cart. The PVL may be accessed from a drop-down list in the field.
    - Once you've created a cart, **you may easily change the standard default value on a cart-by-cart basis** to any of the other values in the PVL for the fields that were defaulted by your Attributes. The drop-down list will save keystrokes.
    - In addition, you may also manually enter a value for a shopping cart field.

12. Select **Edit** to switch to the edit mode.



13. Select the **Drop-down** button in the **Attributes** field to display the list of available attributes. See the next page for descriptions.



Setting Personalization Continued…

14. Review the list of Attribute descriptions below to determine which Attributes to set. Then follow the steps below to set the values.

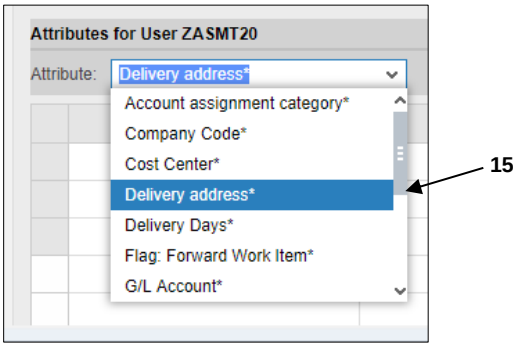
Note: *Some values have been set at the system level, and you should not change these. Other values may have been set by your business office prior to your first use, and you should not change these either.* ***If a value is not discussed in this table, it is not to be used and should not be maintained.***

Account Assignment Category	Choose a value that indicates what type of Cost Object will be used most of the time. • **Asset** = used only by central administration departments • **Cost Center** = indicates that the fund being used for the purchase is a Cost Center (seven-digit numbers for University departments; nine-digit numbers for Health System departments) • **WBS** = indicates that the fund being used for the purchase is a WBS Element/Project (restricted funds beginning with **20x–39x** and **Axx**, as well as **7xx** non-restricted funds for University departments)
Company Code DO NOT CHANGE	DO NOT CHANGE THE SET VALUE. This value indicates the corporate entity to which your department belongs: Duke University = 0010 and Duke Hospital = 0030
Cost Center	Enter as many lines as needed to list the cost center value(s) that may be used on a cart. Use the radio button to select one as the Standard (default). If you enter more than one cost center, others will appear as options in your PVL. Cost objects DO NOT contain a dash/hyphen.
Delivery Address	Enter the building number that corresponds to the delivery address. Use the drop-down to search by building name. Text must be entered with capital letters. Asterisks (*) may be used as text wild cards. For details on how to search for delivery addresses, please refer to detailed guidance found later in this document. If you cannot find your address or if it is a new address, contact the Buy@Duke Help Desk for assistance. Once you have found the appropriate delivery address, use the radio button to select one as the Standard (default). If you enter more than one delivery address, others will appear as options in your PVL.
Delivery Days DO NOT CHANGE	DO NOT CHANGE THE SET VALUE. This value will not prevent deliveries from being made as soon as a supplier is able to process the order.
G/L Account	Enter as many lines as needed to list the six-digit G/L Account values that may be used on a cart. Examples include 645000 for Laboratory Supplies & Materials and 646000 for Office Supplies. The text associated with the G/L Account does not display while you are adding lines; however, it will display in the shopping cart. Use the radio button to select one as the Standard (default). If you enter more than one G/L account, others will appear as options in your PVL.

Setting Personalization Continued…

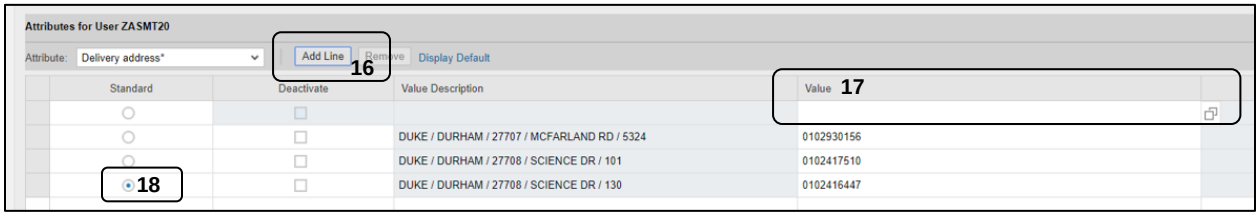
Goods Receipt Flag	COMPANY 0010 USERS – DO NOT SET A VALUE IN THIS FIELD. YOU MUST USE THE NON-VALUED GR FLAG.
Goods Recipient	Enter the name of the person who should receive the ordered items (probably you). This field displays only 14 characters. Abbreviate names if needed.
Non-Valued GR Flag	If your business unit has directed that a goods receipt confirmation should be performed for each cart to indicate that items were received from the supplier (whether you actually perform the goods receipt or someone else in your department does), enter an upper case **X** in the value field. If you are unsure if your unit requires Goods Receipt, check with your business office.
Room Number	Enter the room number or location in a building where the goods should be delivered. Use the radio button to select one as the Standard (default). If you enter more than one room number, others will appear as options in your PVL.
Team Shopping Cart	For those with the Shopper role, team shopping is set as a default and cannot be changed. For those with the Submitter role, if your business unit has chosen to use the team shopping concept (with shoppers sharing carts or submitters reviewing shopper's carts), enter an upper case **X** in the value for this field in Attributes.
WBS Element	Enter as many lines as needed to list WBS elements that may be used on a cart (cost objects beginning with **20x–39x** and **Axx**, as well as **7xx** non-restricted funds). Use the radio button to select one as the Standard (default). If you enter more than one WBS element, others will appear as options in your PVL. WBS elements DO NOT contain a dash/hyphen.

15. Select the Attribute you wish to edit by clicking on its title in the list. Use the scroll bar as needed. For this example, we will use Delivery address. Fields vary slightly based upon the Attribute being updated.



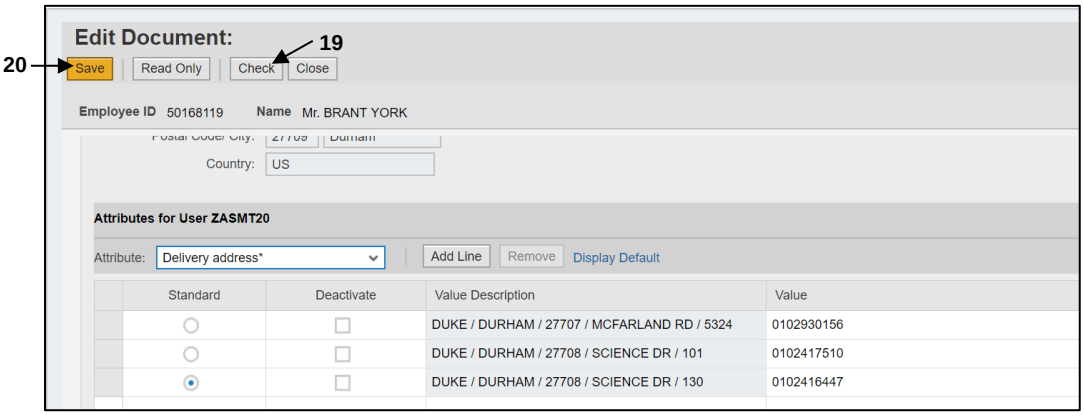
Setting Personalization Continued…

16. In the resulting screen showing the Attribute selected, select **Add Line** to add a new line with white, editable fields and follow the next steps.



17. In the **Value** field, enter the appropriate data. Use the search button to the right of the field to identify your preferred value or contact your business office.

18. Select the radio button in the **Standard** column to identify your preferred choice if you enter multiple lines. The Standard choice will default when you create a new cart. The other items will be part of your PVL.



19. Select **Check** to see if the data you entered is correct. If not, make the correction.

20. If the data do not contain errors, click the **Save** button.

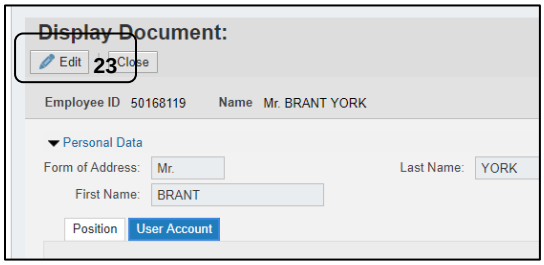
    - You may enter several Attributes before clicking the **Save** button.
    - Each time you use the **Save** button, you must click the **Edit** button to return to the Edit mode.

21. **Repeat steps 13-20 above to select other attributes from the Attributes list, enter the desired values, and check and save the data.**

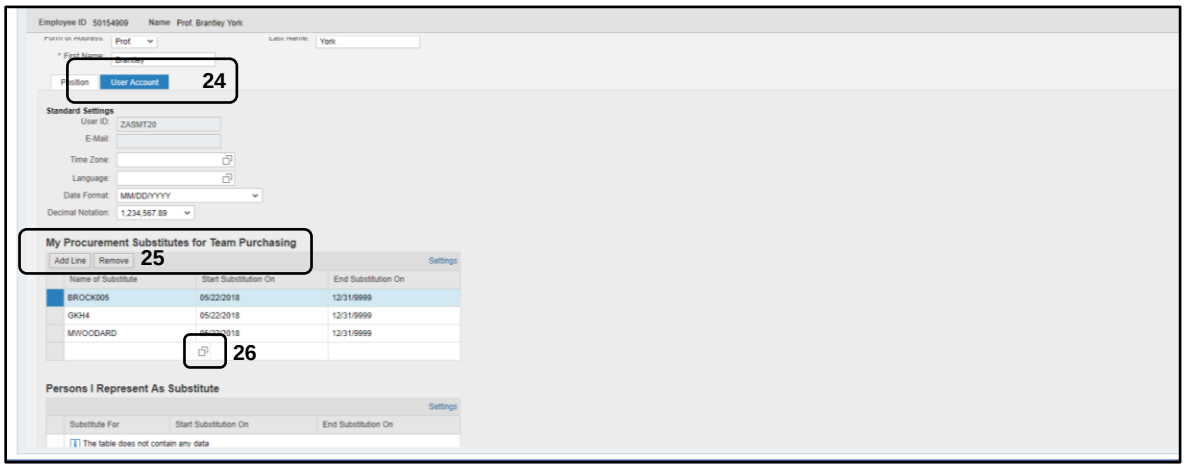
Setting Personalization Continued…

22. If you are a shopper or your team uses team shopping, you must add **Team Members** (Procurement Substitutes) to your team per the next steps. Team members are colleagues in your department who may view your shopping carts. **<u>Shoppers must add their submitters as team members</u>.**

23. Select **Edit** to switch to the Edit mode.



24. Select the **User Account** tab.

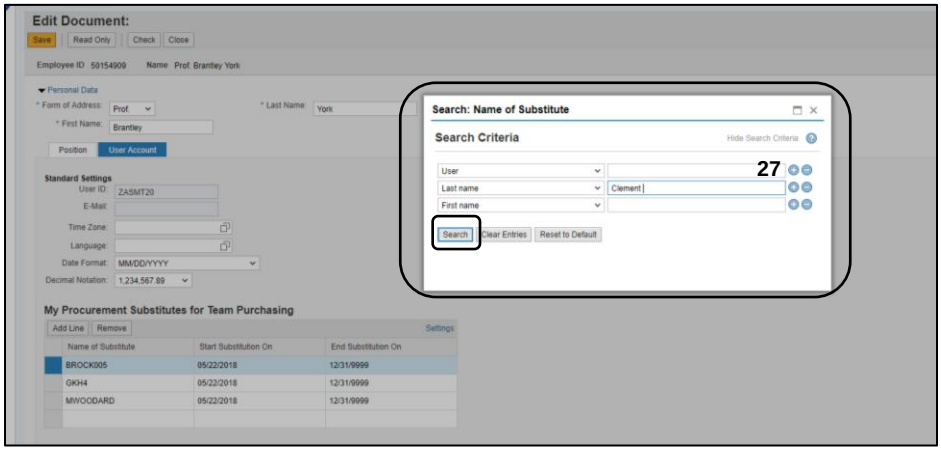


25. In the **My Procurement Substitutes for Team Purchasing** box, select **Add Line**.

26. On the new line, select the **Name of Substitute** field using the **Search** button.

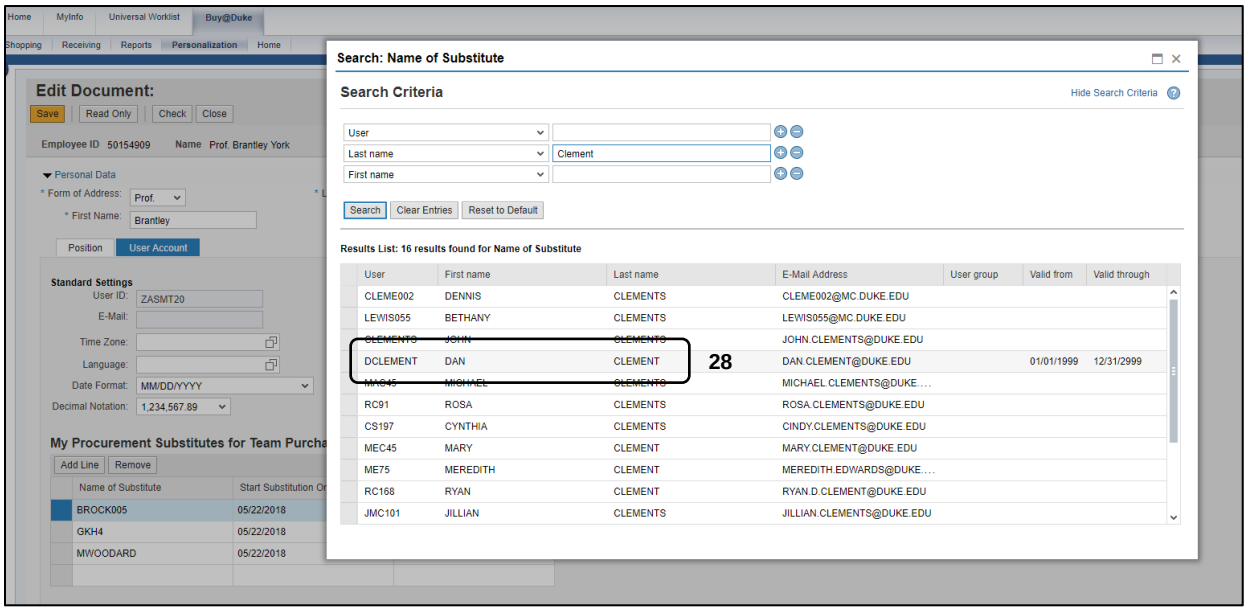
Setting Personalization Continued…

27. In the Search box, **enter the last name** of the team member you wish to add. Then select **Search**.



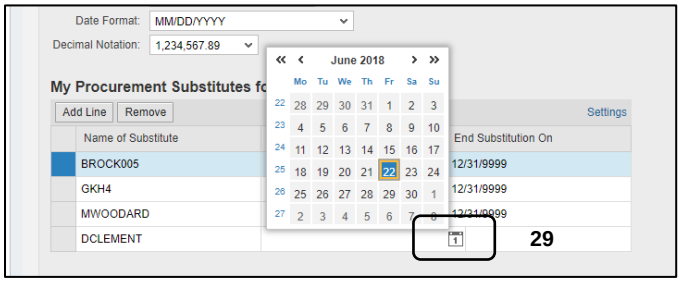
Note: ***Standard Settings*** *found on this screen DO NOT need to be completed.*

28. In the resulting list, click on the line that contains the User ID and name of the team member.



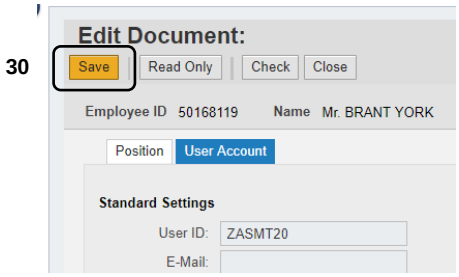
Setting Personalization Continued…

29. To set the **Start and End date** of the team member's access, type the date or use the calendar button to select the date for both the **Start Substitution On** and the **End Substitution On** fields. For the end date, use **12/31/9999** to leave the team members access open ended. If you wish to end the assignment in the future, you will simply **Remove** the line at that time.



30. **To continue to add Team Members, repeat steps 25-29.**

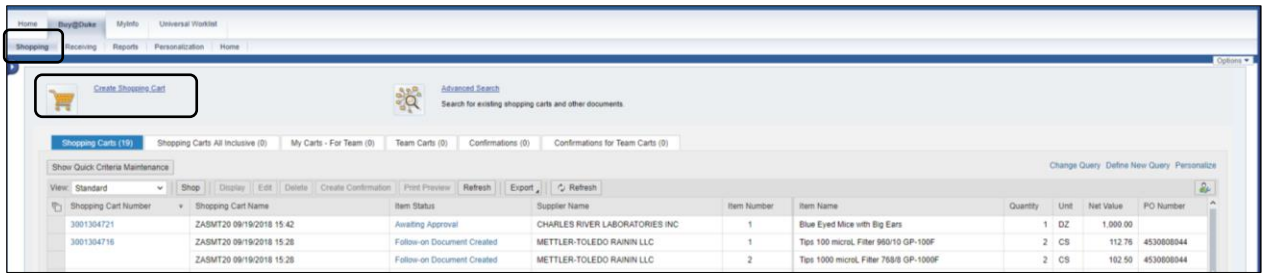
31. After you have entered all your team members, select **Save** button.



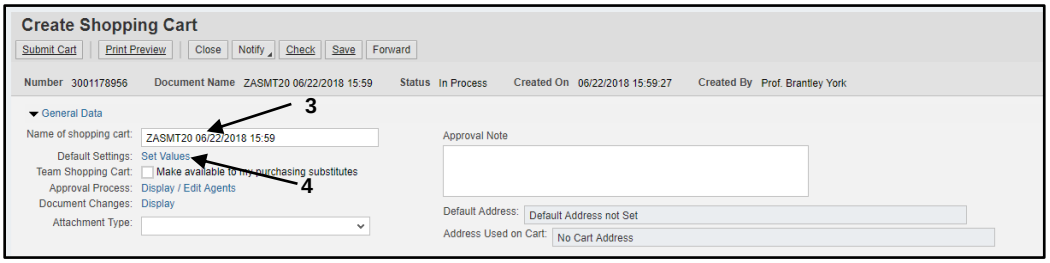
Shopping For Goods and Services

Creating a Shopping Cart

1. On the Shopping page, select the **Create Shopping Cart** link to open the Create Shopping Cart page.



2. On the page, review the information at the top and in the **General Data** section.



3. To change the name of the cart, enter a new name in the **Name of shopping cart** field. (Check if your business unit provides guidance regarding the naming of carts.)

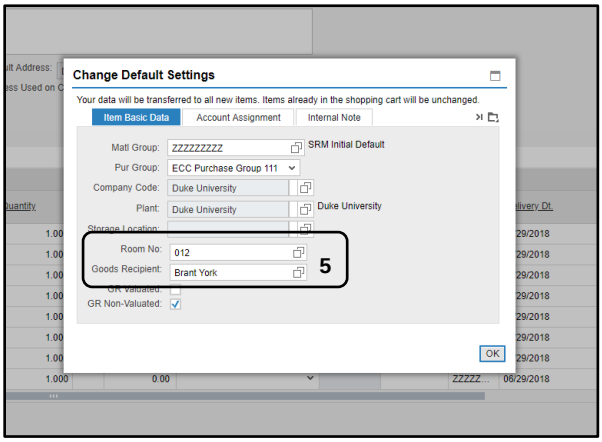
4. If you wish to enter any of the default settings which will apply to this shopping cart, select the **Set Values** link. If default settings are not necessary for this cart, go to Step 9.

   As an example, you may wish to change the delivery address, room number, or Goods Recipient for this cart only. Any changes you make in the **Change Default Settings** box will replace the defaults set in personalizations and <u>will apply only to this specific shopping cart</u>. Future carts will revert to your personalization defaults.

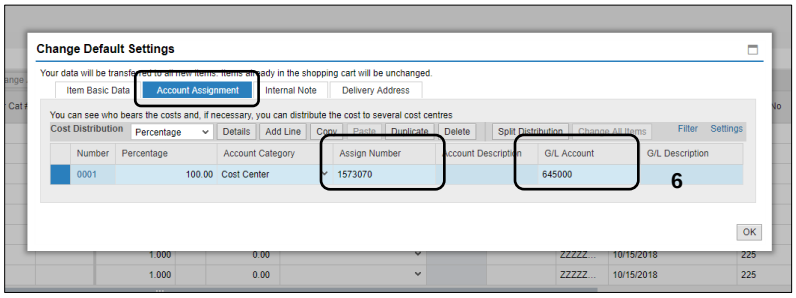
   Note: *Set values for the cart **before** placing items in the cart. Once items are placed in the cart, values will have to be set for each line of the cart.*

Shopping Continued…

5. Select the **Item Basic Data** tab to make changes to the Room Number or Goods Recipient.

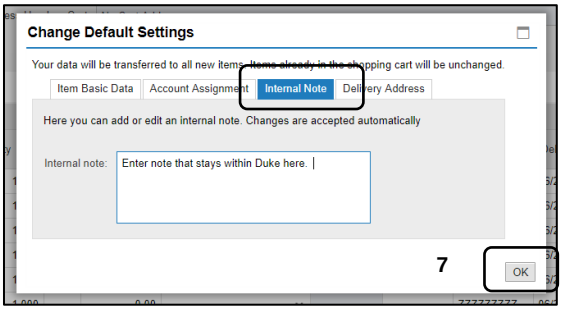


6. If you wish to change the cart's funding information, select the **Account Assignment** tab. Then select the Assign Number column and/or the G/L Account column and enter the changes.



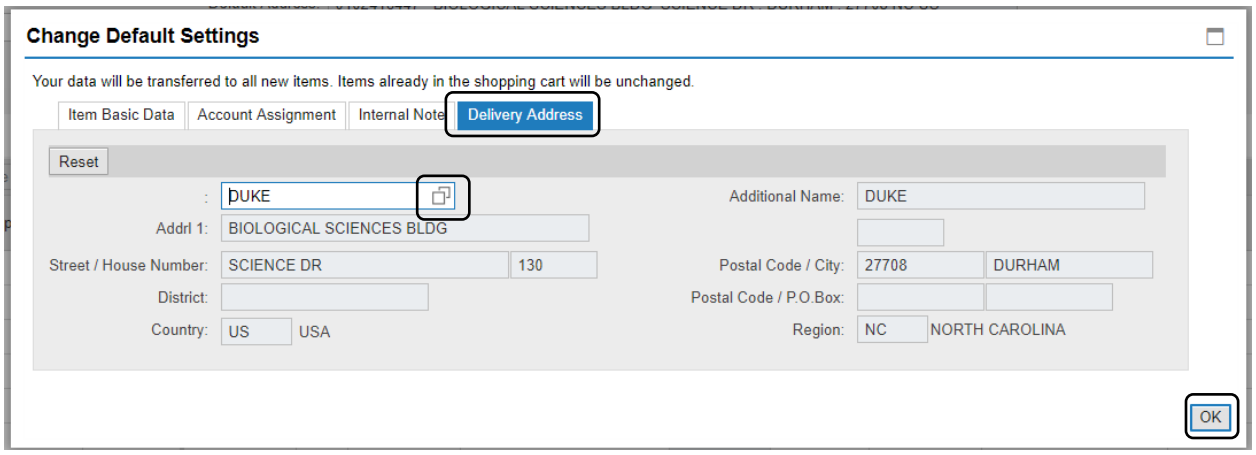
One of the most common Account Assignment changes is to split the cost of the items between two or more Cost Objects. Detailed instructions for this change can be found in the Splitting Cost of Goods/Services section of this guide.

7. You may also wish to enter an Internal Note that will be associated with the shopping cart. This note is only visible within Duke. Once text is entered, select **OK**.

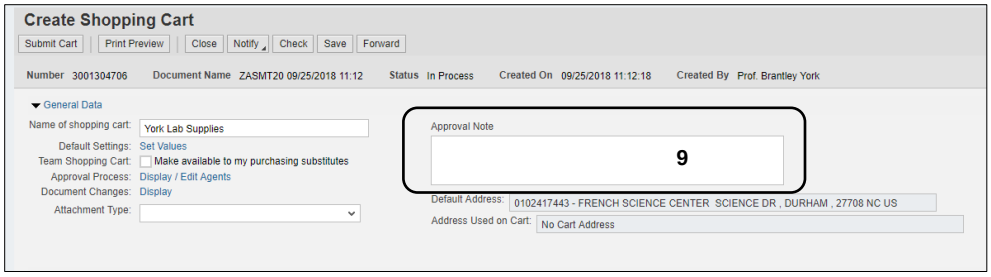


Shopping Continued…

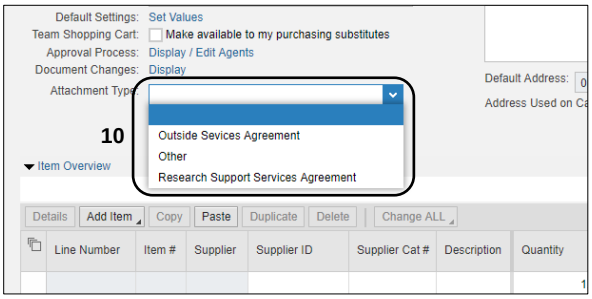
8. Finally, you can change the Delivery Address associated with the cart. Use **Search** to select addresses you set in your Personalizations if you entered more than one delivery address. Once the address is set, select **OK**. Detailed guidance is available for looking up delivery address.



9. If you wish to provide a note for your approver, (such as directing a reviewer to look at attachments), enter it in the **Approval Note** box. Detailed Notes should be entered in the Details section; this process is covered later in the guide.



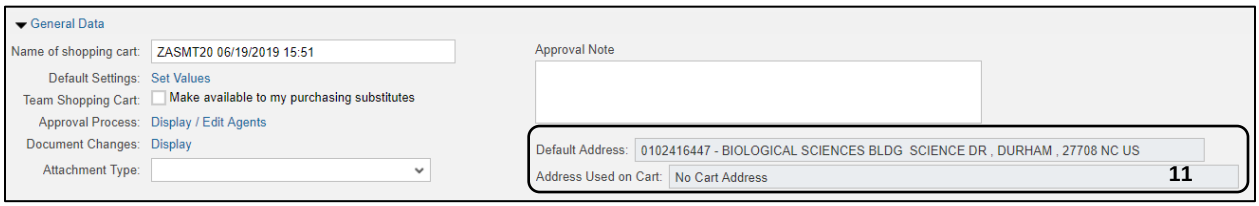
10. You will use **Attachment Type** if you attach documents to the cart. Select the drop-down menu to identify the type of attachment.



Note: *The process of attaching the documents to your cart is covered later in the guide.*

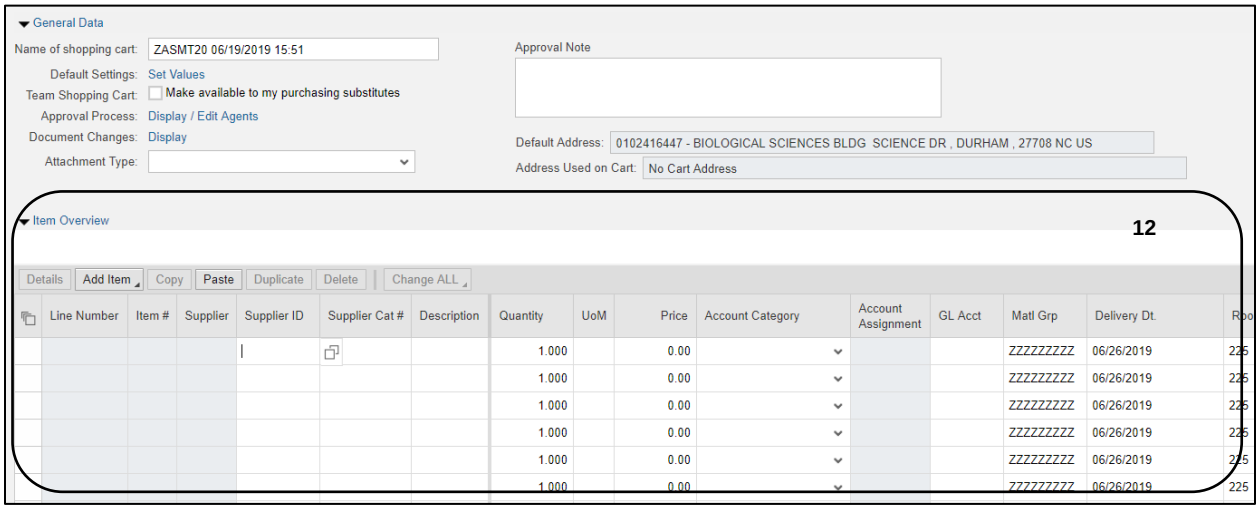
Shopping Continued…

11. In the General Data section, two addresses display. The **Default Address** is the address set in your Personalizations. The **Address Used on Cart** is the address used for the specific cart. If an address is not available in either of these fields **No Cart Address** will be displayed as text in the field.



Note: *If you have used an address on the cart different from the default address, it will not display until you return from the Marketplace or select* ***Check.***

12. Once you've reviewed the General Data section, move to the **Item Overview** section and begin to place items in your shopping cart.



13. You may select items for your Shopping Cart by:

- Selecting items from Punch-Out Supplier Catalogs;
- Selecting items from Hosted Supplier Catalogs; and
- Adding Non-Catalog (Text) Items which includes purchase orders created for services and confirming bill only purchase orders.

Note: *Refer to the following sections of this guide for details on creating and submitting shopping carts for each of the catalogs listed above.*

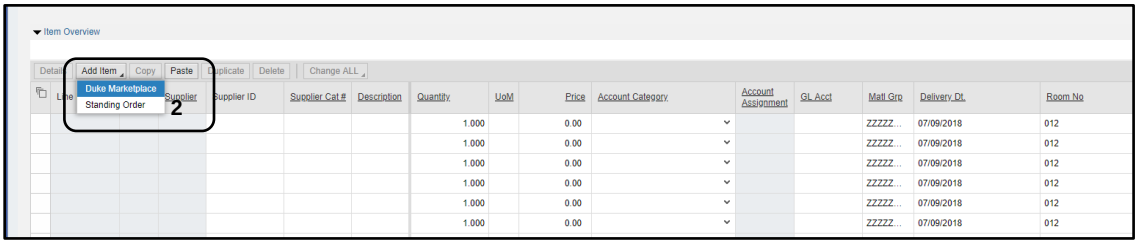
Shopping Continued…

Selecting Items from Supplier Punch-Out Catalogs

Supplier Punch-Out Catalogs are located in the Duke Marketplace and allow you to shop directly in a supplier's online catalog and bring items back into Buy@Duke. These catalogs are maintained by the suppliers and reflect Duke-contracted prices. Each website is maintained by the supplier and will look and navigate differently.

1. In the Create Shopping Cart window, move to the Item Overview section where you will begin to place items in your Shopping Cart.

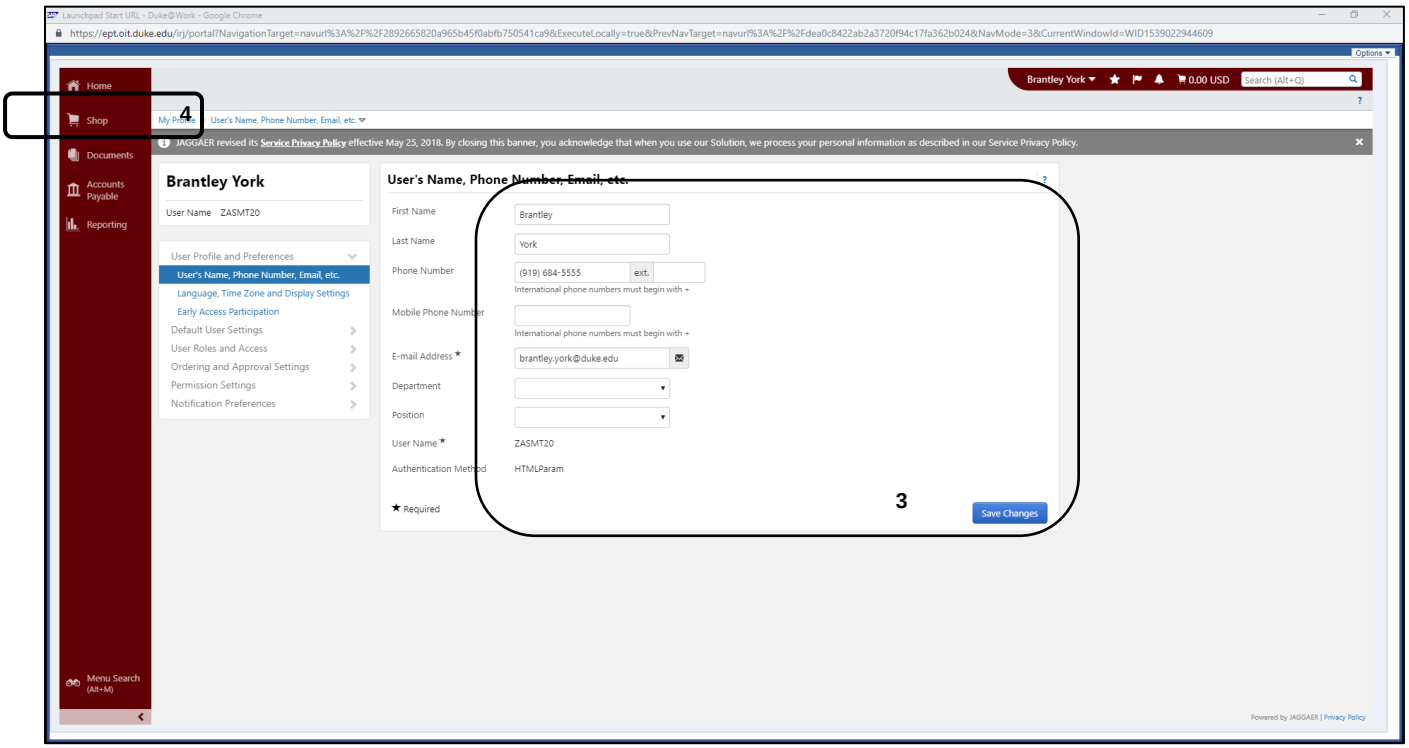
2. To add items to the Shopping Cart in the Item Overview section, select the **Add Item** button and select **Duke Marketplace**.



Shopping Continued…

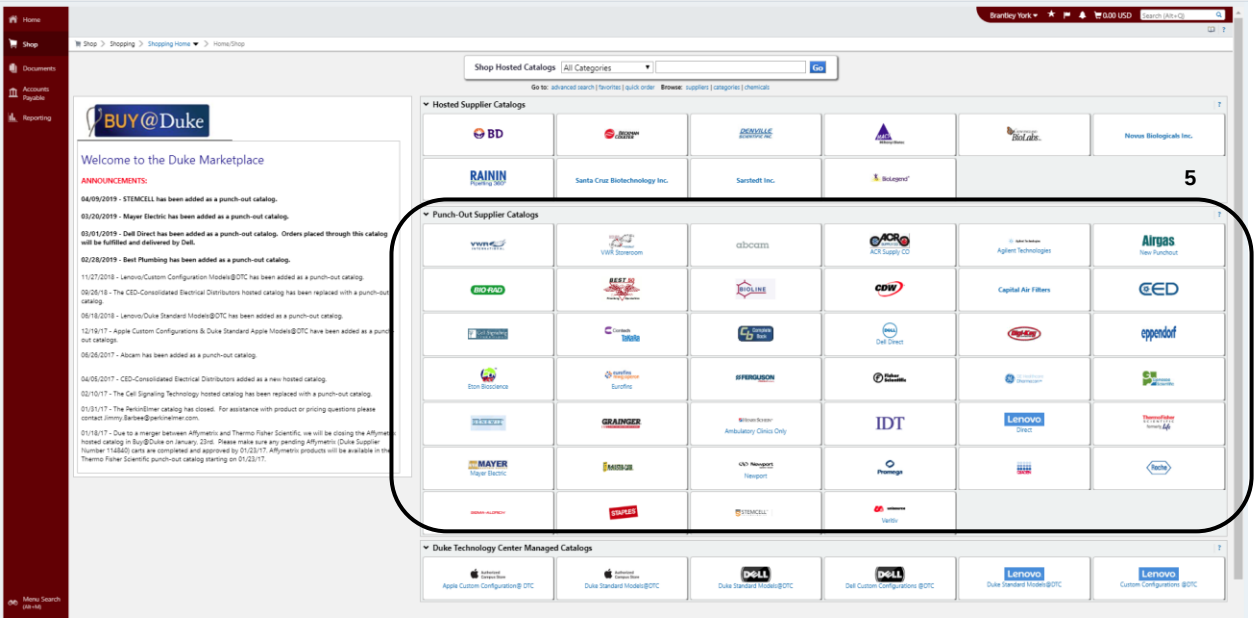
3. The first time you enter the Duke Marketplace, you will be prompted to enter information on the Profile screen. Enter your First Name, Last Name, Phone Number, and Email Address. Then select **Save Changes**.

4. Click on the **Shop** icon to go to the main Duke Marketplace screen.



Shopping Continued…

5. Select a Punch-Out Supplier Catalog by clicking on the box with the supplier's name.

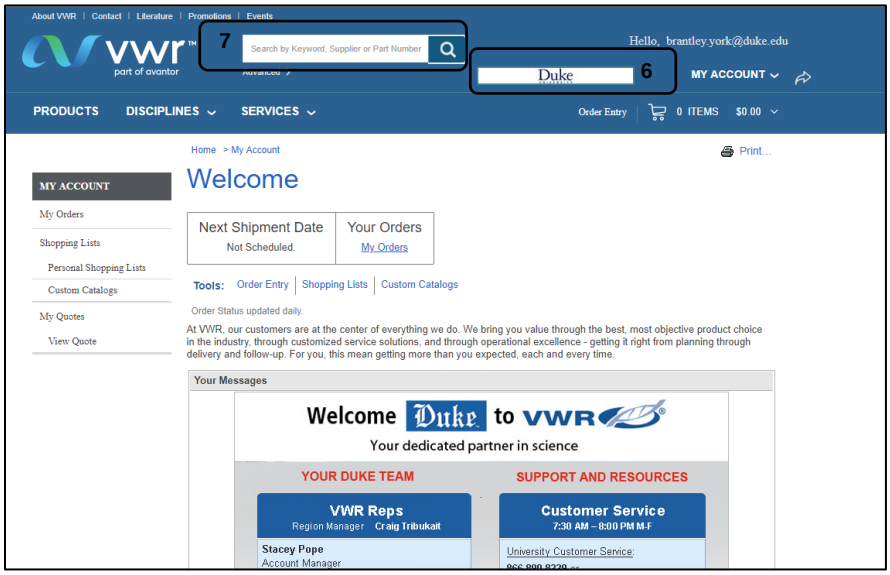


Note: The catalog will open in a new browser window. When the supplier's punch-out window opens, you will have moved from the Duke Marketplace to the supplier's website. Each supplier's website will look and function differently.

Shopping Continued…

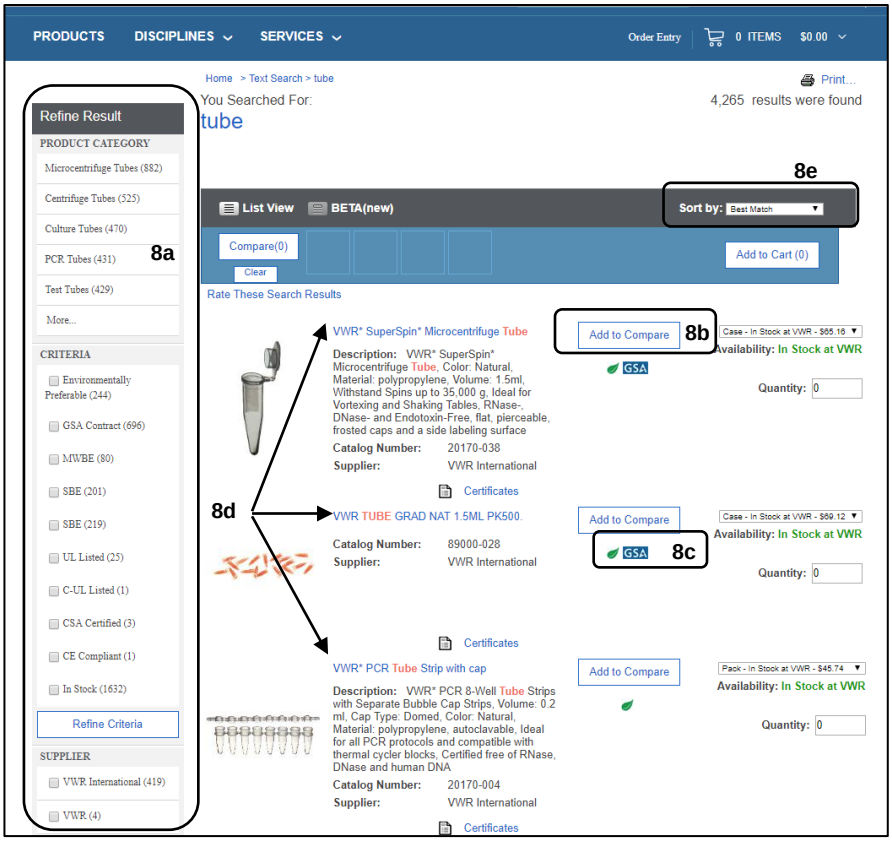
6. Once in the supplier's website (for our example it is VWR), confirm that this is the Duke-specific supplier site by locating the Duke logo at the top of the page.

7. Supplier's website will typically provide a search box. You may be able to enter the supplier's catalog item number, a part number, or a general search term in the appropriate fields and select the **Search** or **Find** button.

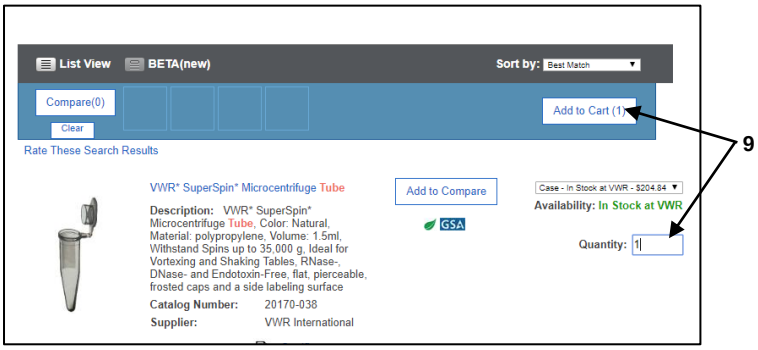


Shopping Continued…

8. In the resulting list, narrow the list by using the various functions available on the supplier's site. Functions available will vary by supplier but might include:
    a. Ability to further refine your search.
    b. Ability to compare items.
    c. Flags for specific items indicating programs.
    d. Hyperlinks providing detailed product descriptions.
    e. Sort items using a variety of criteria.

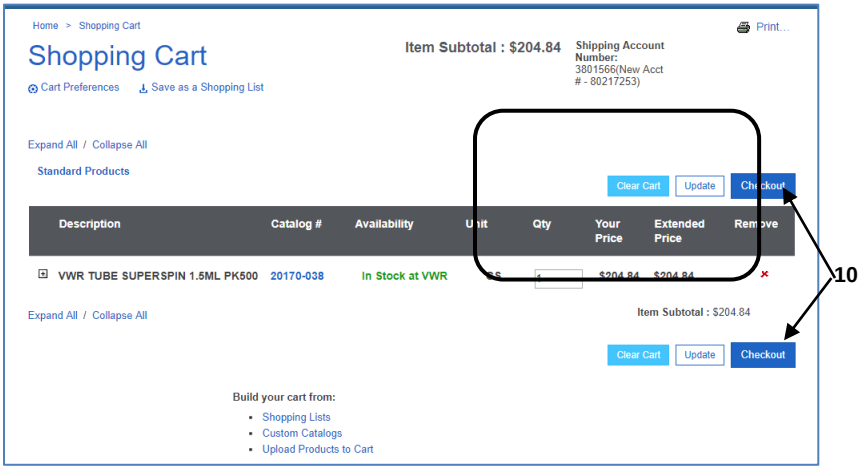


9. Once you identity the products you would like to purchase, enter the quantity and add the items to your cart.



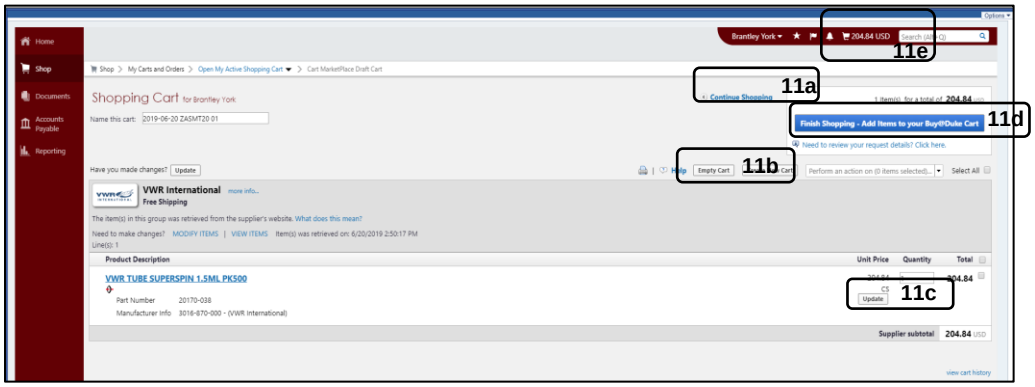
Shopping Continued…

10. Repeat steps 8 and 9 until you have placed all the items in the shopping cart. Once you have placed all items in the shopping cart for this supplier's website, perform the checkout functions as outlined on the supplier's site. **<u>This action will return you to the Duke Marketplace</u>.**



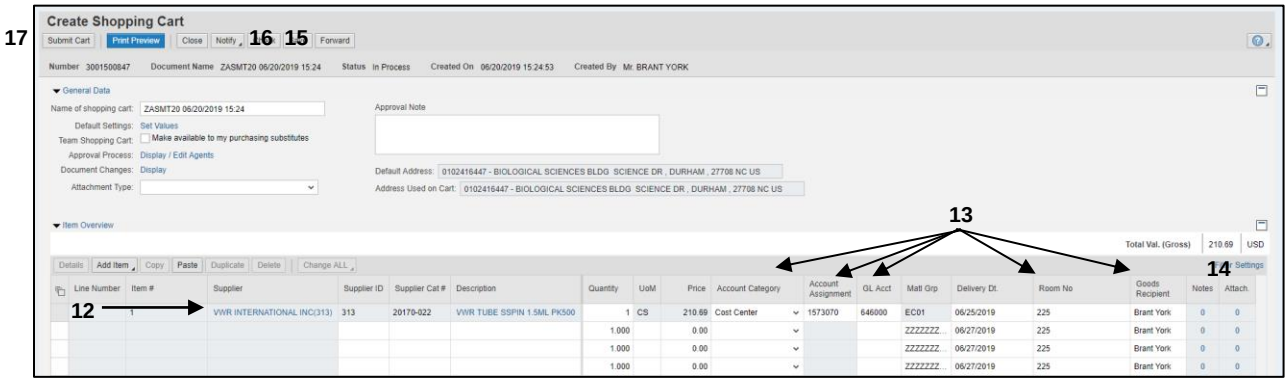
11. Notice in the Duke Marketplace that you have now created a shopping cart. From your shopping cart, you can:

    a. **Continue Shopping** and return to the Marketplace home page where all vendors display.
    b. **Empty Cart** and begin again.
    c. **Update** the cart and add or delete the quantity of the items in the cart.
    d. **Finish Shopping – Add Items to your Buy@Duke Cart** to leave the Marketplace and return to Buy@Duke.
    e. **View your Cart** by selecting the shopping cart icon.



Shopping Continued…

12. When you select **Finish Shopping,** you will return to the **Create Shopping Cart** page in the Buy@Duke website. Notice how the items you selected in the Duke Marketplace have moved into the shopping cart. In the event the cart returns empty, take a look at detailed instructions for pulling your items into the shopping cart.



13. Also notice how the financial information (Account Category, Account Assignment, and G/L Account), Room Number, and Good Recipient appear. These were pulled into the cart from the Attributes you set previously in your Personalizations. **These fields may be edited if you need to make a change.**

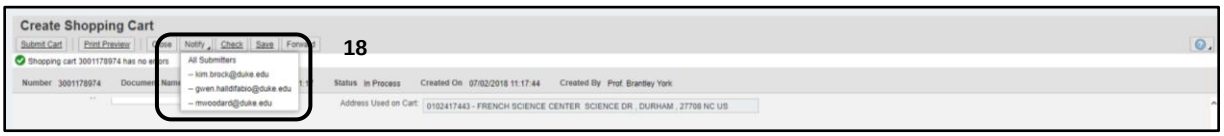
14. If you wish to add **Attachments** or **Notes** to the items in your cart, follow the steps in the **Notes and Attachments** section of this guide.

15. If you wish to save the cart, select **Save**. You may return to the cart later to add items or change information.

16. When you have completed the cart, select **Check** and make any corrections that are indicated.

17. **<u>If you are a Submitter</u>** and have completed the cart, select **Submit Cart.** This action will move the cart to the next step in the ordering process.

18. **<u>If you are a Shopper</u>** and have completed the cart, select **Notify** and select from the menu either:
    - All Submitters to notify all your Submitters that the cart is ready for review; or
    - The email address of just one Submitter to notify only him or her that the cart is ready for review.
    - This action saves the cart and sends an email to selected submitters.



19. Close your browser.

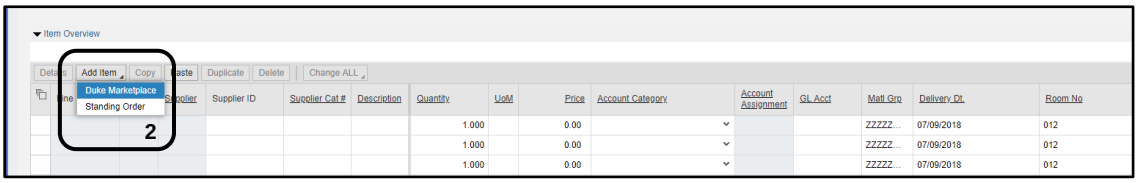
Shopping Continued…

Selecting Items from Hosted Supplier Catalogs

Hosted Supplier Catalogs are located in the Duke Marketplace and are maintained by Procurement and Supply Chain Management staff members. Suppliers provide product listings and Duke-negotiated pricing for items in these electronic catalogs.

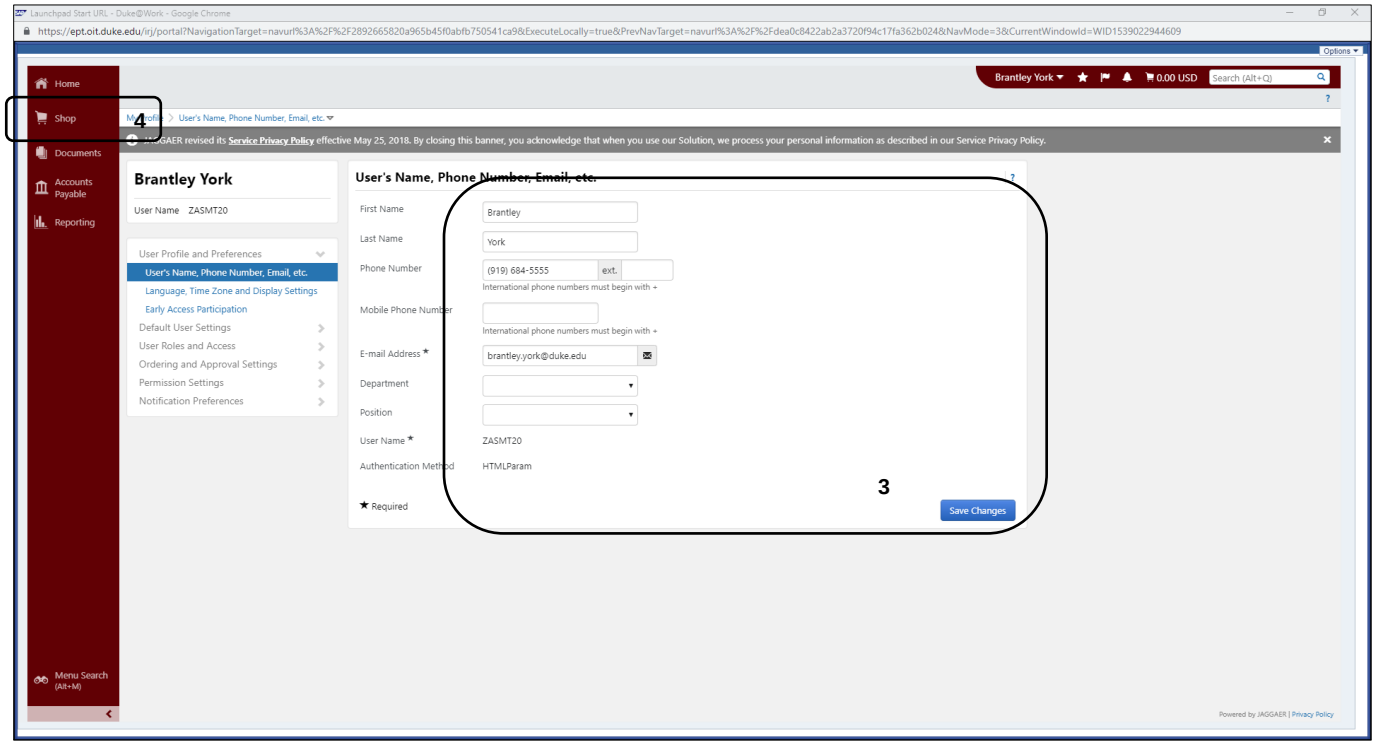
1. In the Create Shopping Cart window, move to the Item Overview section where you will begin to place items in your Shopping Cart.

2. To add items to the Shopping Cart in the Item Overview section, click on the **Add Item** button and select **Duke Marketplace**.



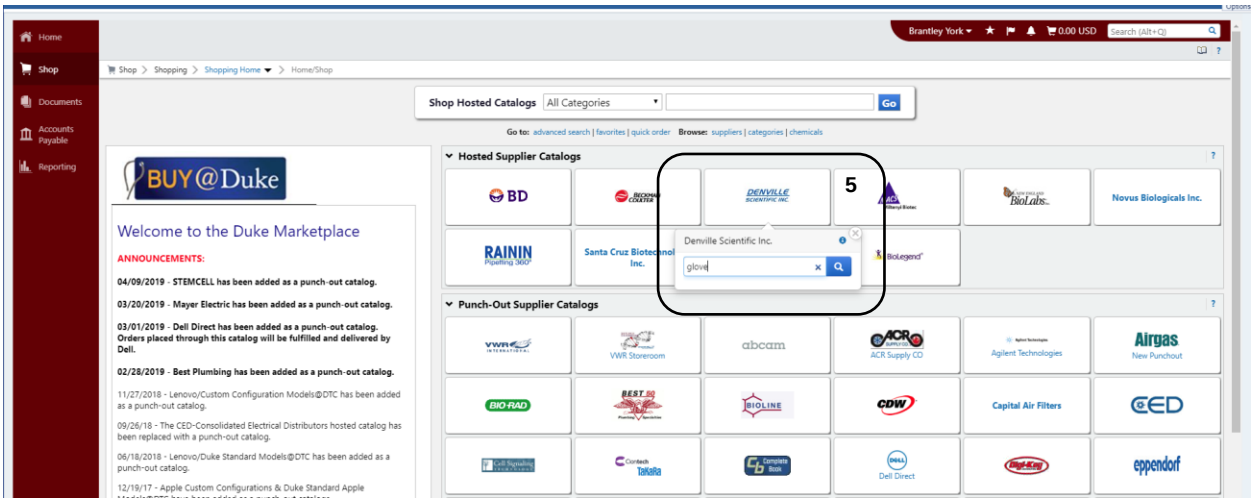
3. The first time you enter the Duke Marketplace, you will be prompted to enter information on the Profile screen. Enter you First Name, Last Name, Phone Number, and Email Address. Then select **Save Changes**.

4. Select the **Shop** icon to go to the main Duke Marketplace screen.

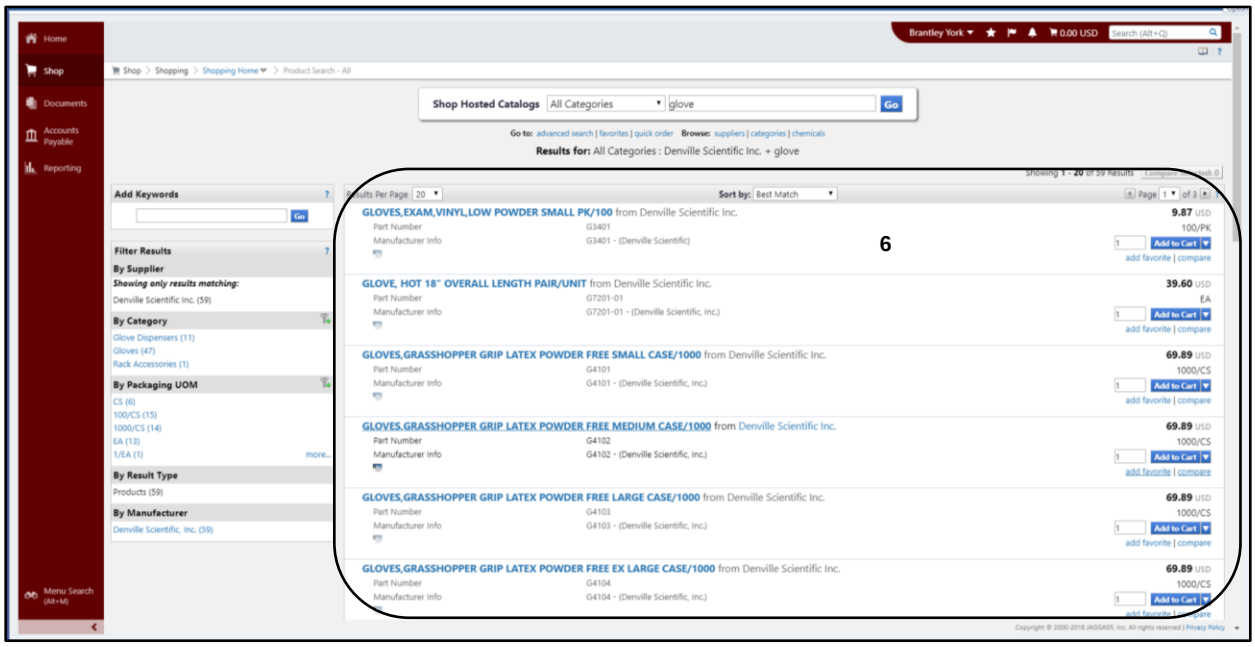


Shopping Continued…

5. On the Marketplace home page, select an item from a Hosted Supplier Catalog (Denville Scientific in this example) using the search function by clicking on the supplier's button to open a search box specific to that supplier. Enter a description of the item or its catalog item number to place it in your cart, and then click on the **Search** button. To begin your search, use a singular noun to describe the item. You may also use asterisks (*) as text wild cards.



6. A list with all the items matching your criteria will appear.

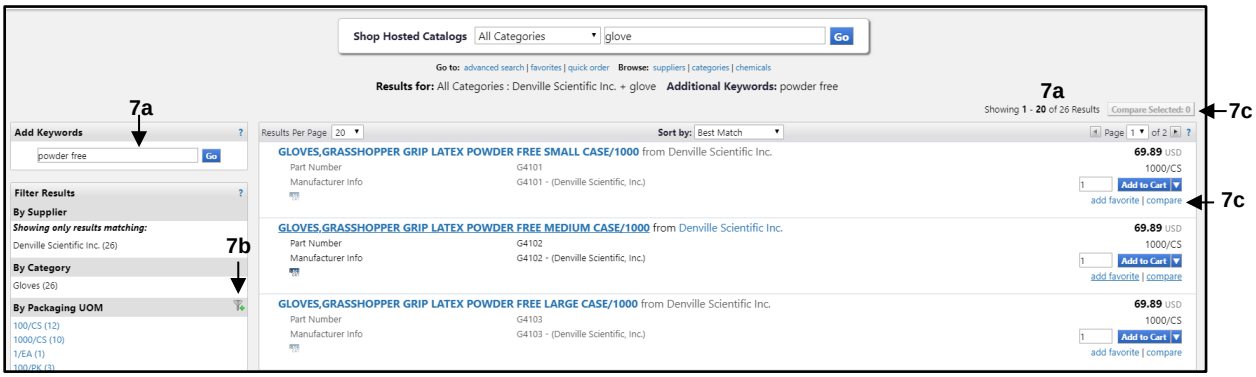


Shopping Continued…

7. From this screen, you can take a variety of actions to refine your search:
    a. On the left, narrow your search by entering descriptive words and clicking on the Go button. In this example, using “powder free” reduced the original list from 59 items to 26 items that include the words “powder free” in their descriptions.
    b. In the Filter Results box, narrow or broaden the list by clicking on the various search criteria: By Supplier; By Manufacturer; By Packaging UOM (Unit of Measure).
        - Click on the funnel icon to view the criteria list.
        - Click in the box next to the items you wish to include as filter criteria. Select **Filter**.

        - If you wish to remove the filter, click on the funnel icon next to the criteria you used. The funnel will have a red negative sign next to it.

    c. Compare items that are similar to each other to determine which product best meets your needs. Identify each item and then select **Compare Selected.**

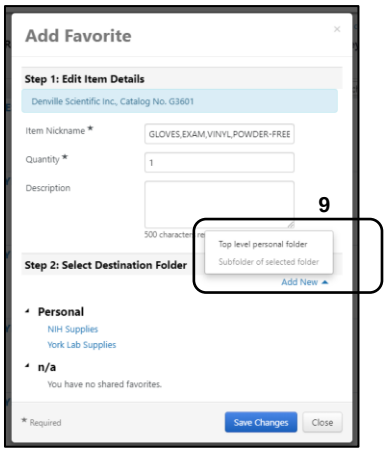


8. To add an item to a **Favorites folder**, select it from the list and click on **Add Favorite** to open the Favorite window.

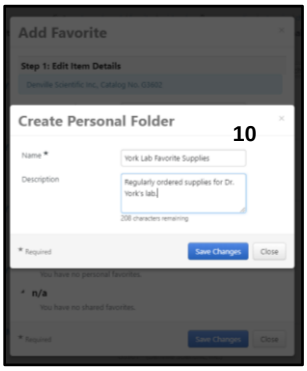
Note: *Using favorites will save time by eliminating searches for specific items you order on a regular basis.*

Shopping Continued…

9. To create a folder, which must be done the first time you add a favorite, click on the **Add new** link and select **Top level personal folder**.

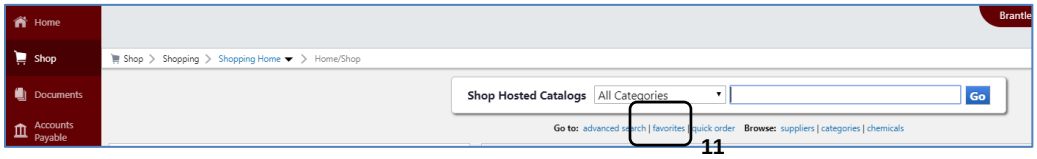


10. When prompted, **enter a name for the folder** and an optional description. Then click on the **Save Changes** buttons on the **Create Personal Folder** screen and the **Add Favorite** screen.

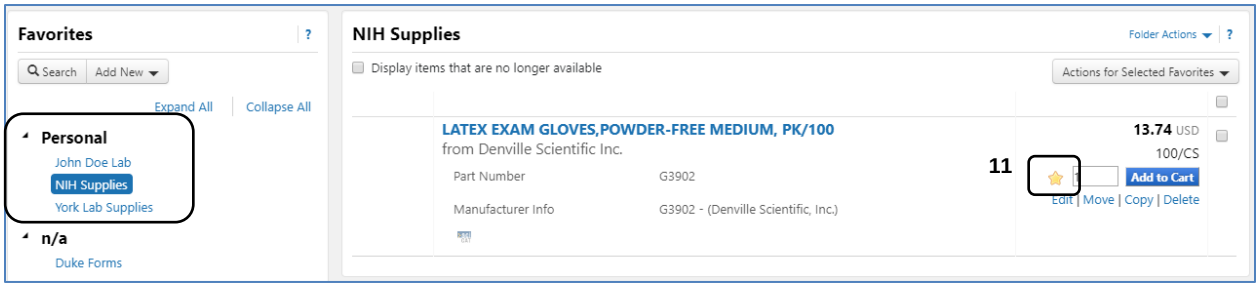


Shopping Continued…

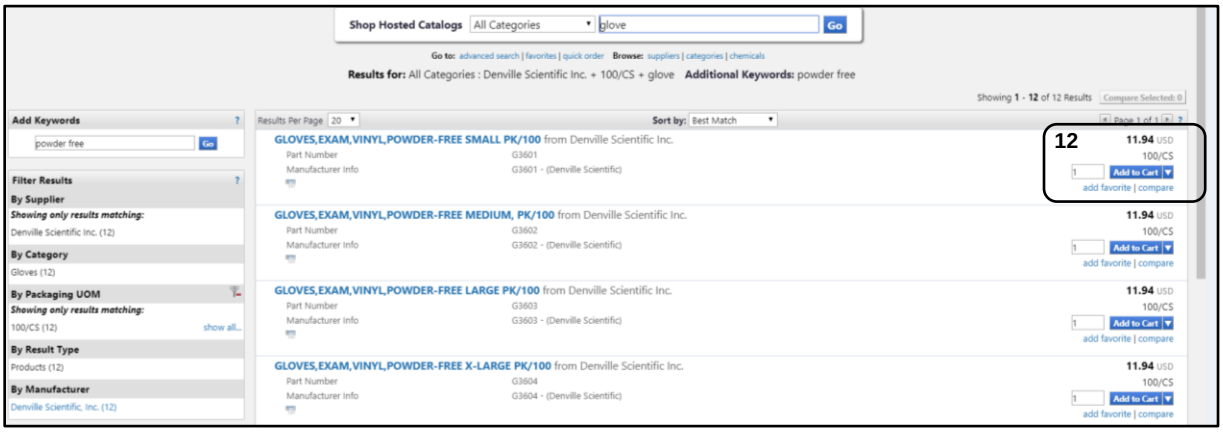
11. In the future, you may begin your shopping cart by going directly to the Favorites folder, bypassing the various search functions.



You can select favorite items from each of the folders created. Additionally, favorites will be highlighted with a yellow star.

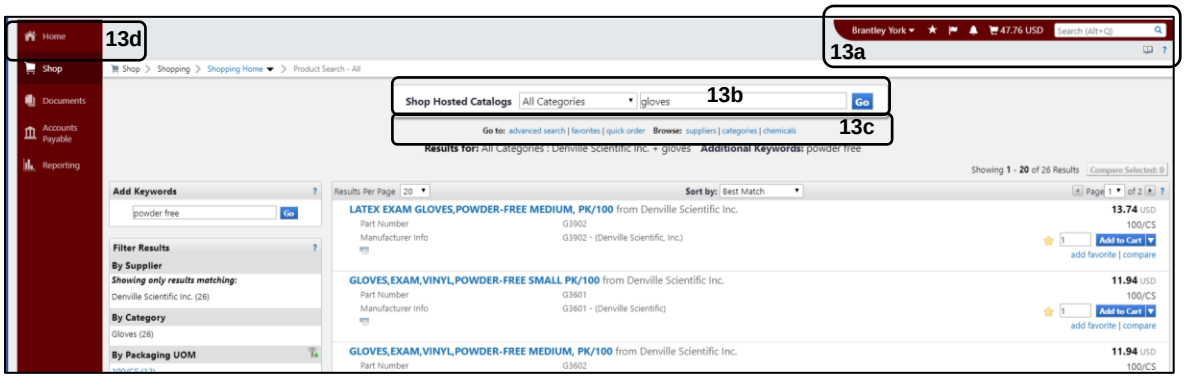


12. When you are ready to place items in the cart, review the list of items, select the specific item, and enter the number of items you wish to purchase. Then select the **Add to Cart**.



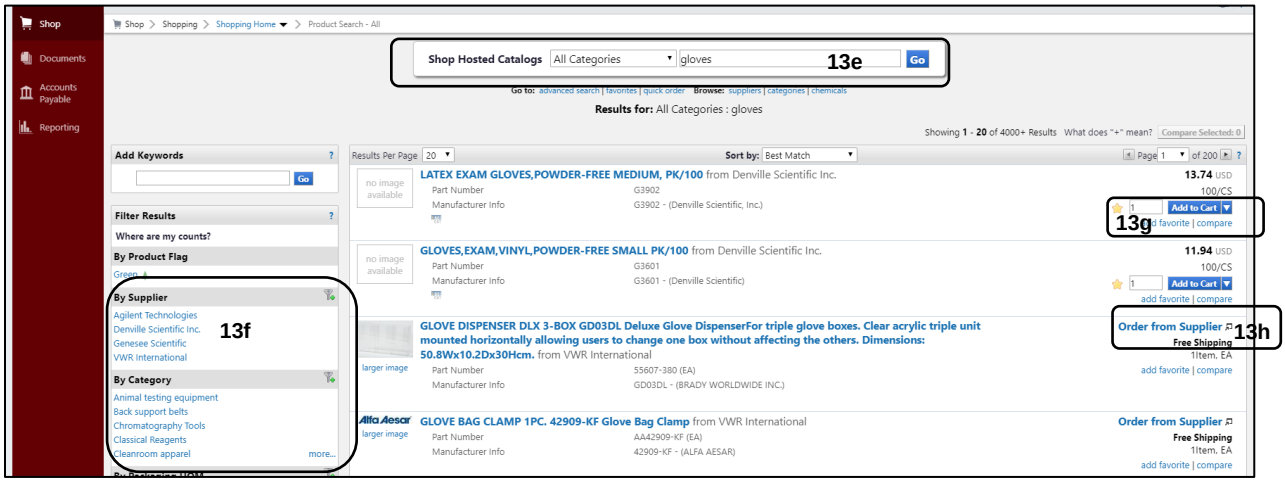
Shopping Continued…

13. Notice in the Duke Marketplace that you have now created a shopping cart. From here you may:
    a. **View your Cart** by selecting the shopping cart icon.
    b. **Continue Shopping** by searching on items in the Shop Hosted Catalog search box. This functionality is explored in more detail below.
    c. **Go To and Browse** additional searches and items.
    d. Return to either the Hosted Supplier or Punch-Out Supplier catalogs, click on the **Home** page.



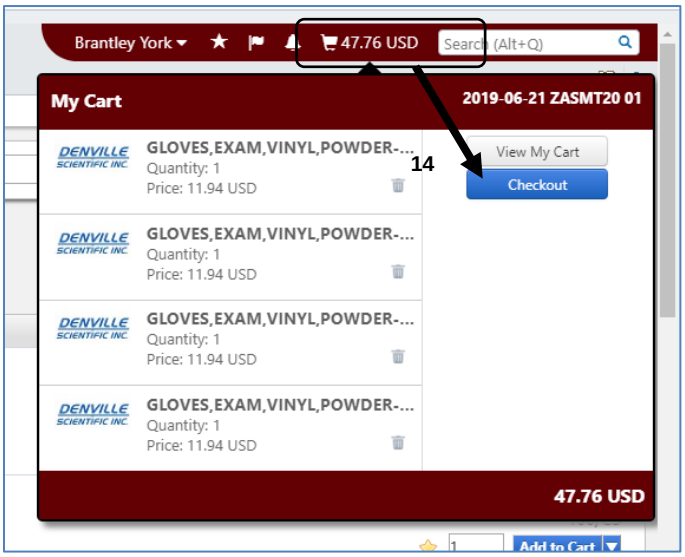
Note: *Shopping **Hosted Catalogs** allows you to search for an item using both hosted and level two punch-out catalogs. Level two punch-out catalogs are designed with an "*****" on the Marketplace home page.*

    e. To search, enter the item description in the **Shop Hosted Catalogs** box and select **Go**. Notice there are now 4,000 plus results for gloves.
    f. Search **By Supplier** or **By Category** using the **Filter** as necessary.
    g. Items from a Hosted Supplier Catalog will have the **Add to Cart** button in their boxes.
    h. Items from Punch-Out Supplier Catalogs will have an **Order from Supplier** link in their boxes.

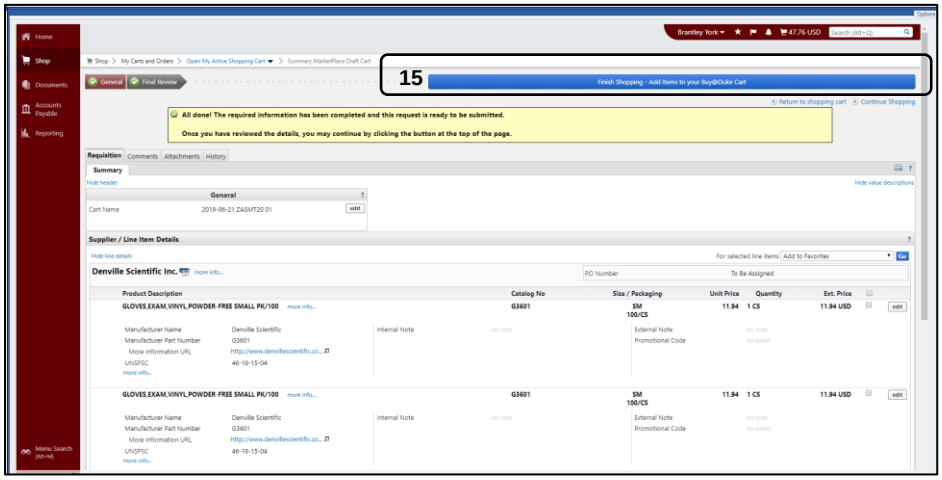


Shopping Continued…

14. Once you've added all the items you wish to place in your cart, review the cart by selecting the shopping cart icon in the top right corner. Next, select **Checkout**.

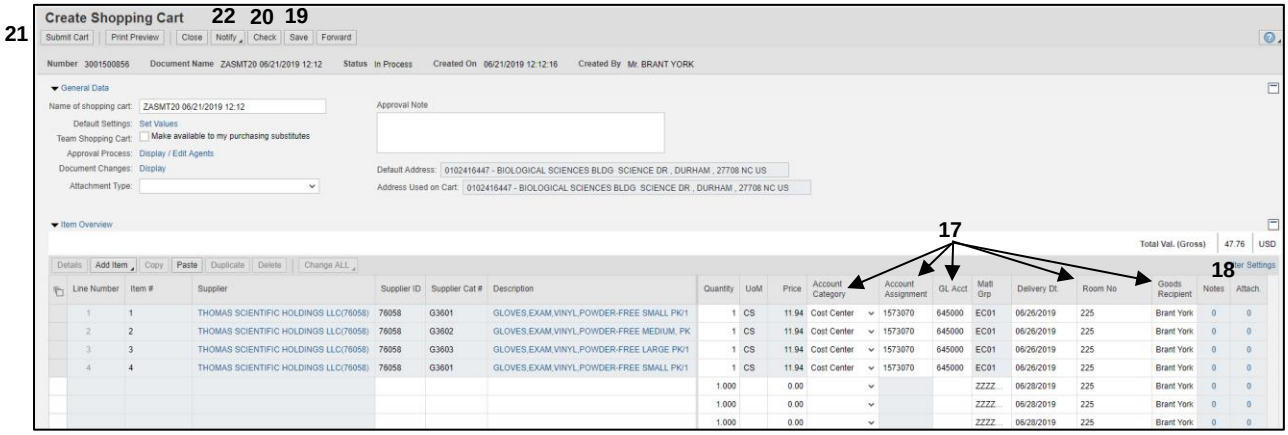


15. When you have finished shopping, select **Finish Shopping**.



Shopping Continued…

16. When you select **Finish Shopping,** you will return to the **Create Shopping Cart** page in the Buy@Duke website. Notice how the items you selected in the Duke Marketplace have moved into the shopping cart.



17. Also notice how the financial information (Account Category, Account Assignment, and G/L Account), Room Number, and Good Recipient appear. These were pulled into the cart from the Attributes you set previously in your Personalizations. **These fields may be edited if you need to make a change.**

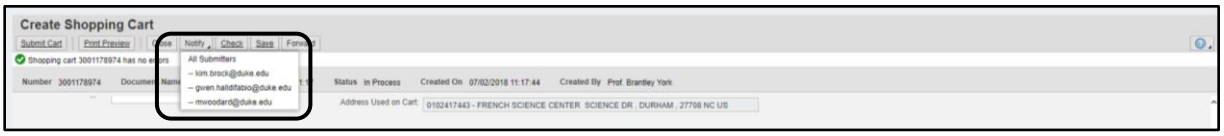
18. If you wish to add **Attachments** or **Notes** to the items in your cart, follow the steps in the **Notes and Attachments** section of this guide.

19. If you wish to save the cart, select **Save**. You may return to the cart later to add items or change information.

20. When you have completed the cart, select **Check** and make any corrections that are indicated.

21. **<u>If you are a Submitter</u>** and have completed the cart, select **Submit Cart.** This action will move the cart to the next step in the ordering process.

22. **<u>If you are a Shopper</u>** and have completed the cart, select **Notify** and select from the menu either:
    - All Submitters to notify all your Submitters that the cart is ready for review; or
    - The email address of just one Submitter to notify only him or her that the cart is ready for review.
    - This action saves the cart and sends an email to selected submitters.



23. Close your browser.

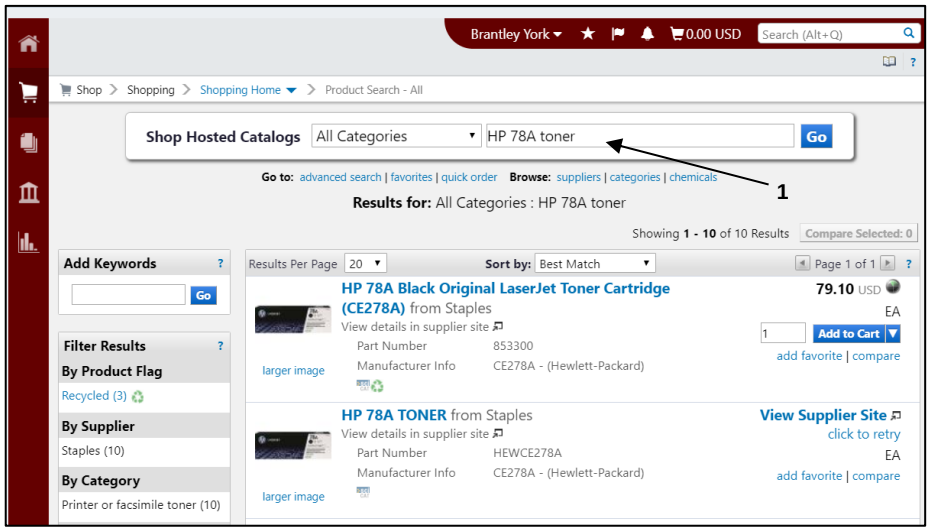
Shopping Continued…

Live Price Plus – Search Functionality – Coming Soon

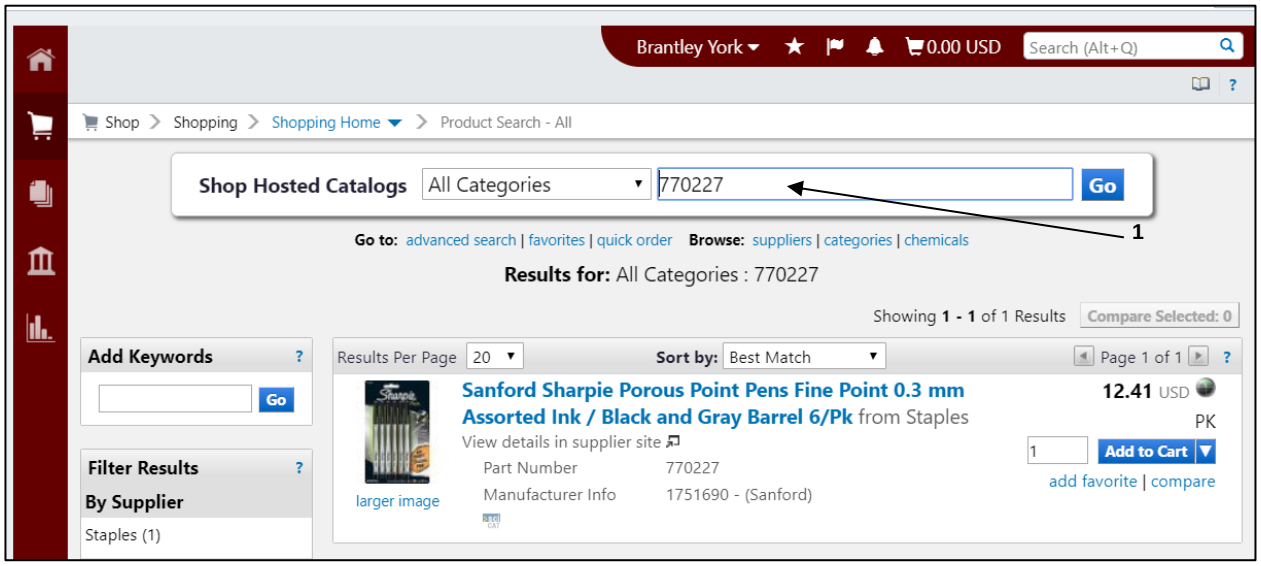
Enhanced search functionality is coming soon to the Duke Marketplace. The search functionality allows users to use the search box on the Marketplace home page to search for items in certain punch-out catalogs and add those items directly to a cart without opening the punch-out catalog. Staples will be the first vendor included in this search with others being added.

1. From the Marketplace, enter your item. The search works best when you include a specific model or an item or part number.

   Example: Search on HP 78A toner

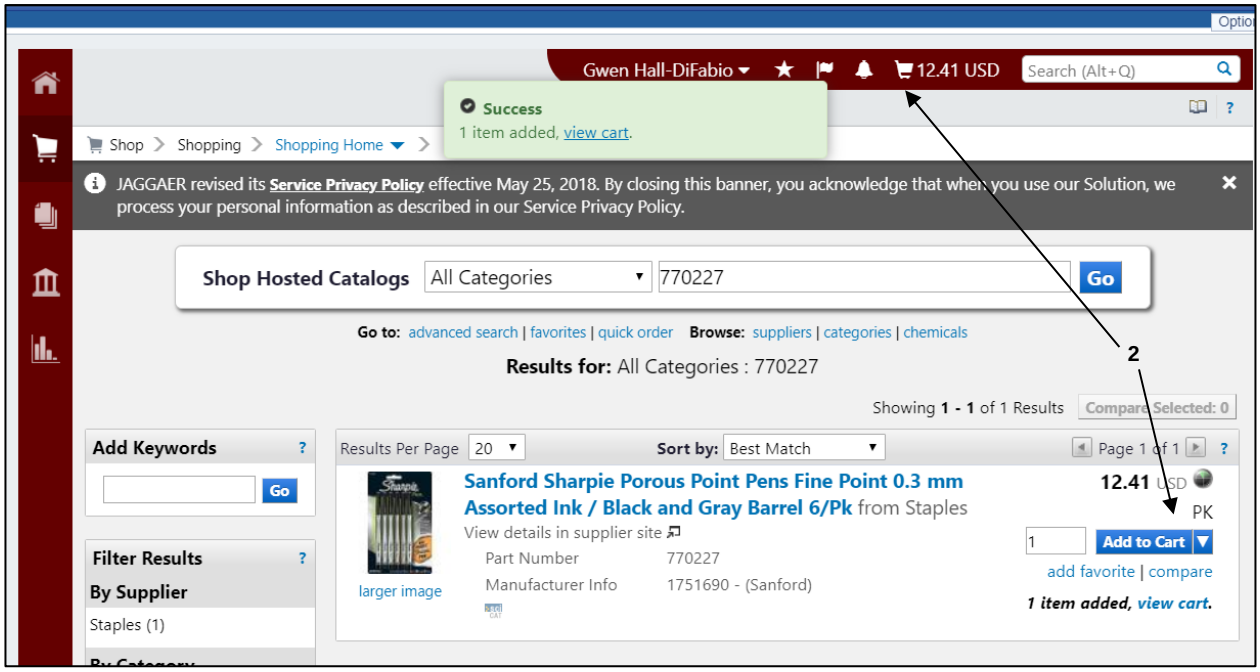


   Example: Part number 770227

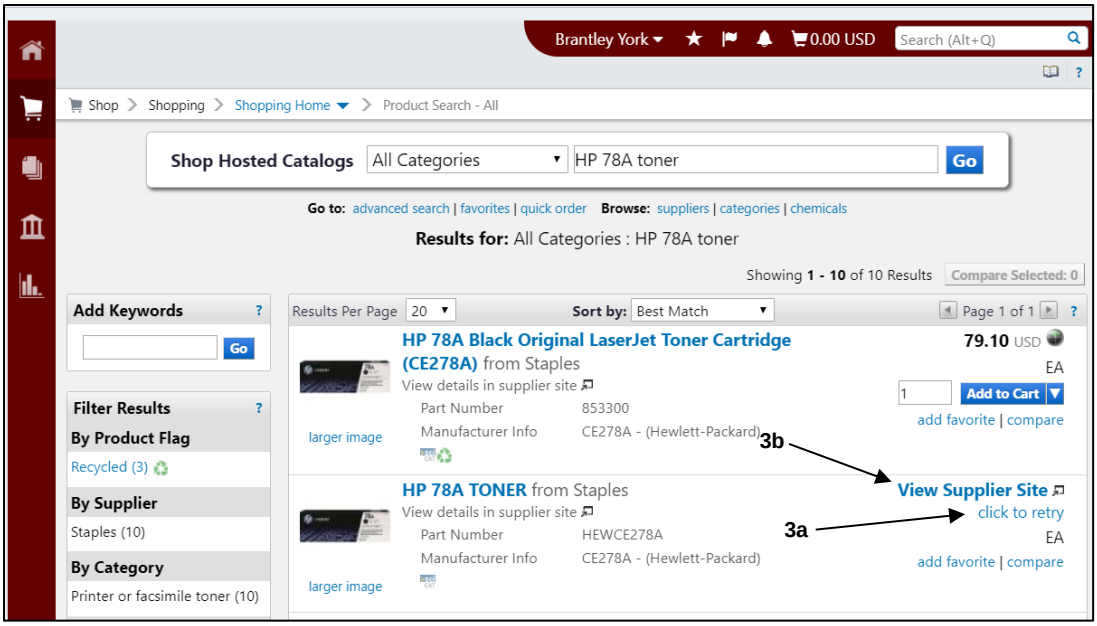


Shopping Continued…

2. When the item and price return, select **Add to Cart**. The item will be added to your Marketplace Cart.



3. In some cases, the price may not return quickly.
   a. Select **Click to Retry** to retrieve the price.
   b. If that doesn't retrieve the price, select **View Supplier Site.** This will take you to the punch-out catalog where you can continue searching for the item.



Shopping Continued…

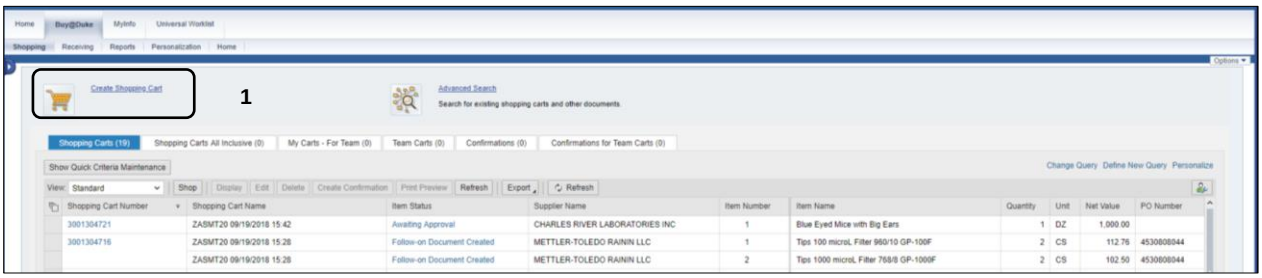
Selecting Text (Non-Catalog) Items

Shoppers and Submitters may order goods and services that (1) are from suppliers that do not have a catalog in the Duke Marketplace; (2) are not found in either a Hosted or a Punch-Out catalog; or (3) can be found in a Marketplace catalog, but you have a special supplier quote that cannot be retrieved using the supplier's catalog. They may also request payment for invoices for goods and services by designating a cart for Special Handling as a Confirming Order.

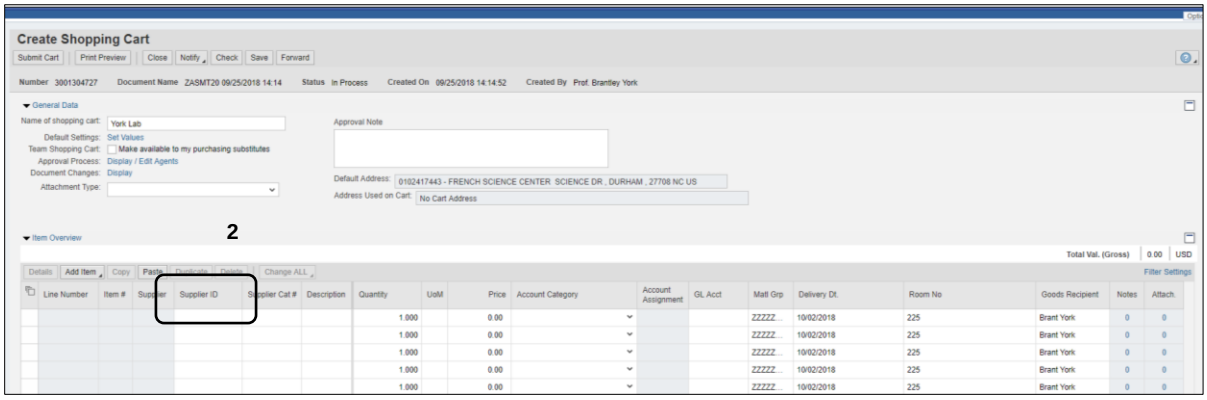
Text Carts are different from other Buy@Duke carts in that item descriptions and supplier information are entered manually.

Note: *Since carts done by Text are based on quotes and other information provided by suppliers; they should always include an attachment.*

1. Select the **Create Shopping Cart** link to open the Create Shopping Cart page.

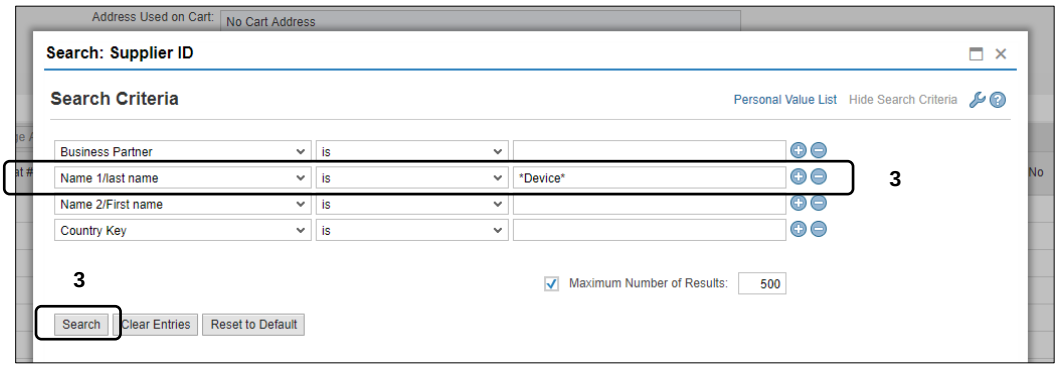


2. Click in the **Supplier ID** field. If you know the SAP Supplier ID number, enter it in the field by typing. If you have created a **Personal Value List** (see below) select from your list.

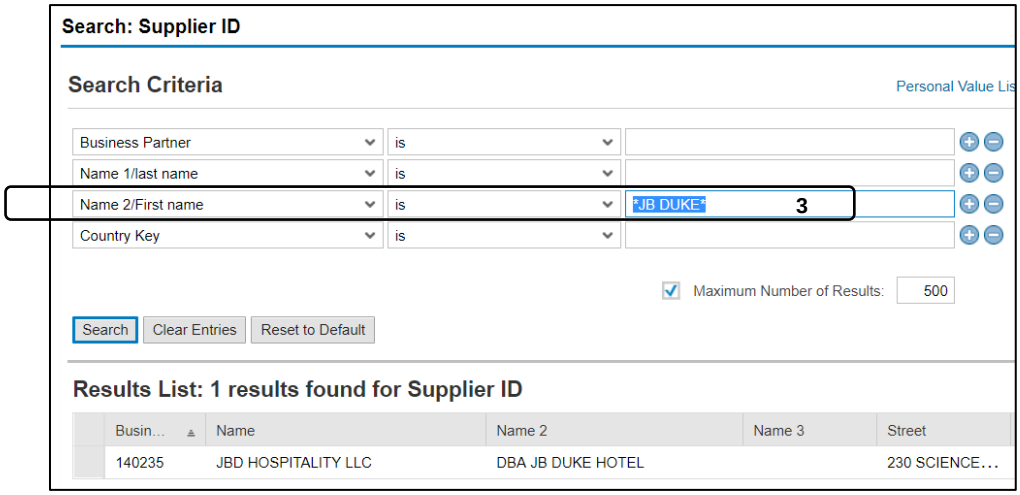


Shopping Continued…

3. If you do not know the SAP Supplier ID number:
   - Select the search button which displays when you click into the Supplier ID box to show the **Search: Supplier ID** box.
   - In the **Name 1/last name** box, type in a portion of the supplier's name, using asterisks as text wildcards. In our example below, for Scientific Device International, we used *Device* and the entire name is returned.
   - Select **Search**.



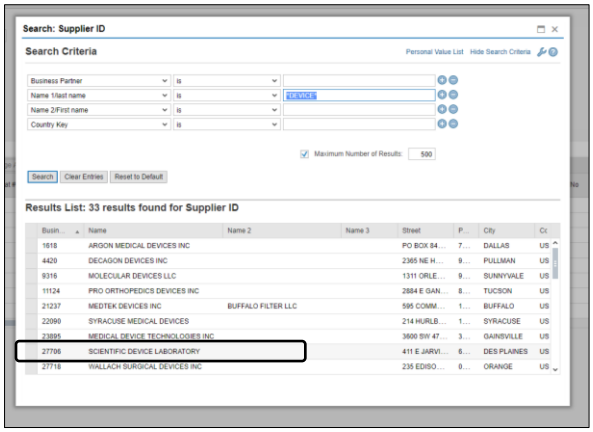
Note: *If searching in the Name1 field does not return desired results, try searching in the Name 2 field. The Name 2 field is used if a company has a "Doing Business As (DBA)" name. Companies with DBAs are often known by their DBA vs. actual name of the company. In the example below, the JB Duke Hotel is the DBA for JBD Hospitality LLC. Entering *JB Duke* in the Name 1 field will not return results.*

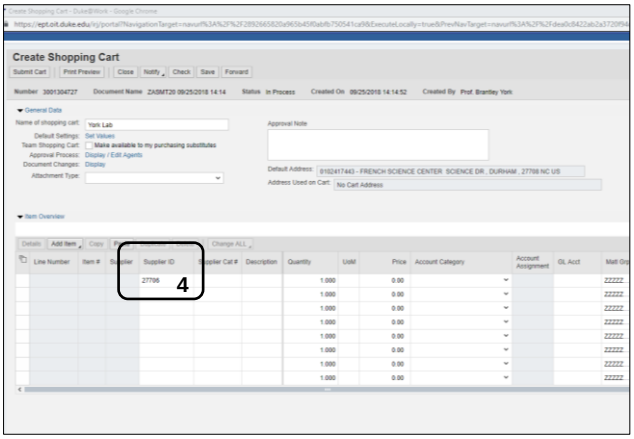


Note: *If the search produces multiple results for the same supplier, contact the Procurement help desk for assistance in selecting the correct Supplier ID.*

Shopping Continued…

4. In the resulting list, click the **Name** field to select the supplier and populate the field. You may add the Supplier ID to your Personal Value List (see steps below).



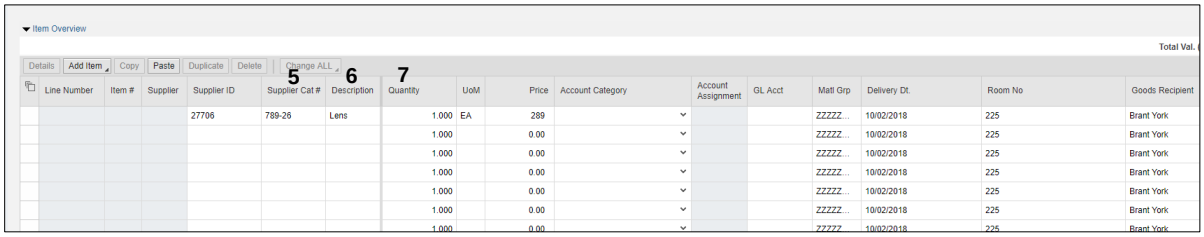


5. Tab to the **Supplier Catalog Number** field and enter the supplier's catalog number for the item. This is not a required field.

6. In the **Description** field, enter a short-text description of the first item you wish to place in your shopping cart.

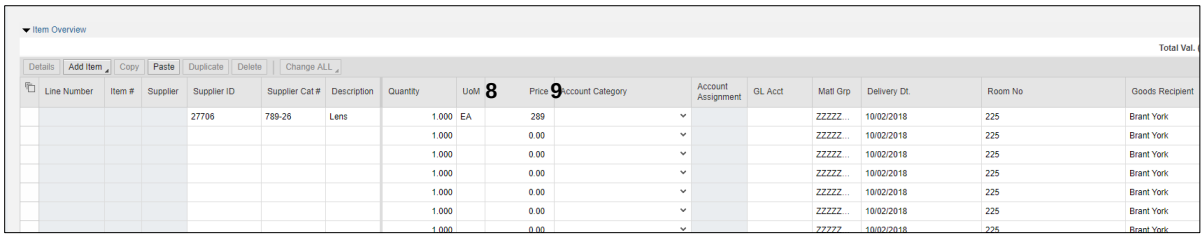
> ***Note:*** *Corporate Accounts Payable will use this text to match the Invoice with the Purchase Order line item. The text should match the quote or other information provided by the supplier.*

7. Tab to the **Quantity** field and enter the number of this item to be ordered and placed in your shopping cart.

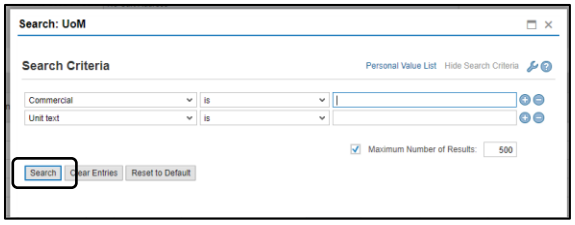


Shopping Continued…

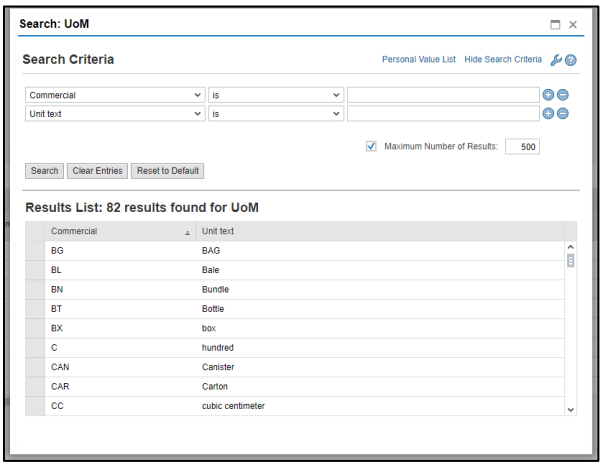
8. Tab into the **Unit of Measure (UOM)** field. If you know the Unit of Measure, enter it in the field. If you don't know the Unit of Measure:



- Select the search button which displays when you click into the UOM field.
- Select **Search**.



- Review the Unit Text list and click on the desired unit of measure. You may add the unit of measure to your Personal Value List (see steps below).

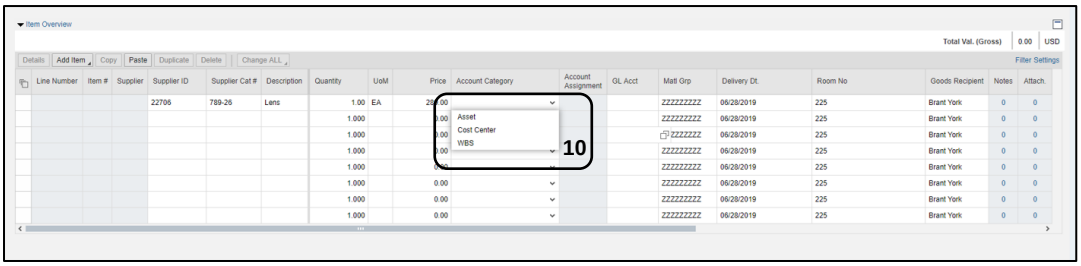


Note: *If you are unsure of the correct unit of measure, EA (each) will work in most instances.*

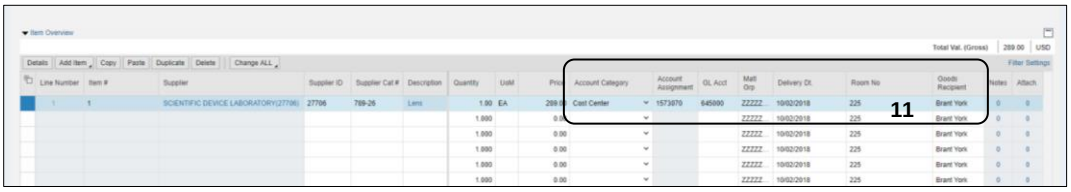
9. Tab to the **Price** field and enter the unit price for the item.

Shopping Continued…

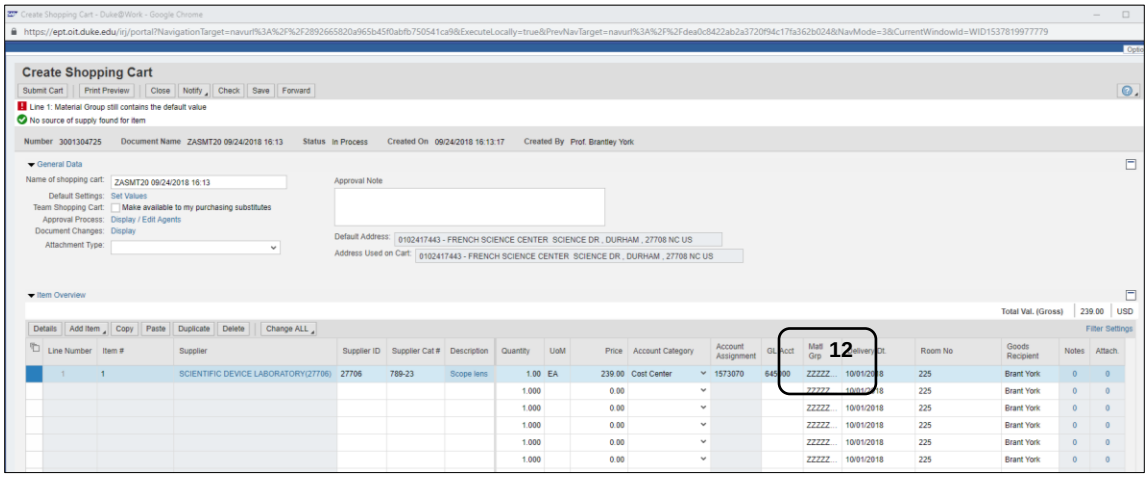
10. In the Account Category field, choose the drop-down list to select the desired Cost Object.



11. The **Account Assignment, GL Acct, Room No, and Goods Recipient** fields will populate, drawing in your preferred defaults set in your Personalizations.



12. Tab to the **Material Group** field.

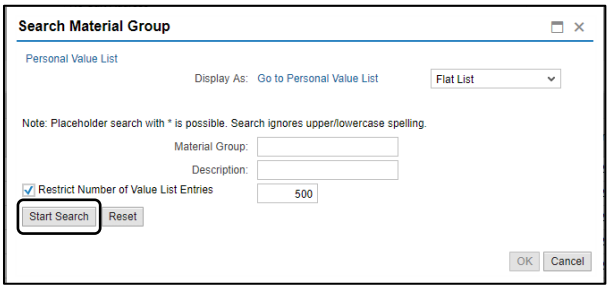


Shopping Continued…

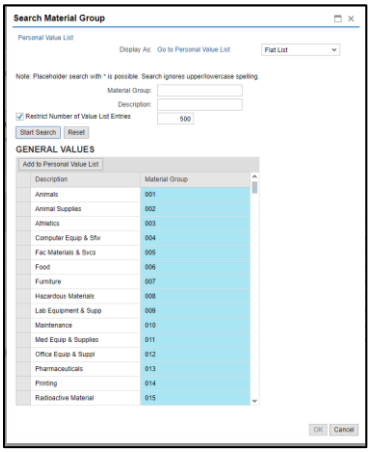
13. If you know the three-digit Material Group number, enter it in the field. If you do not know the Material Group number:

- Select the search button which displays when you click into the Material Group field.
- Select **Start Search.**

13



- In the resulting list, choose the Material Group to select the number and populate the field. You may add the Material Group to your Personal Value List (see steps below).

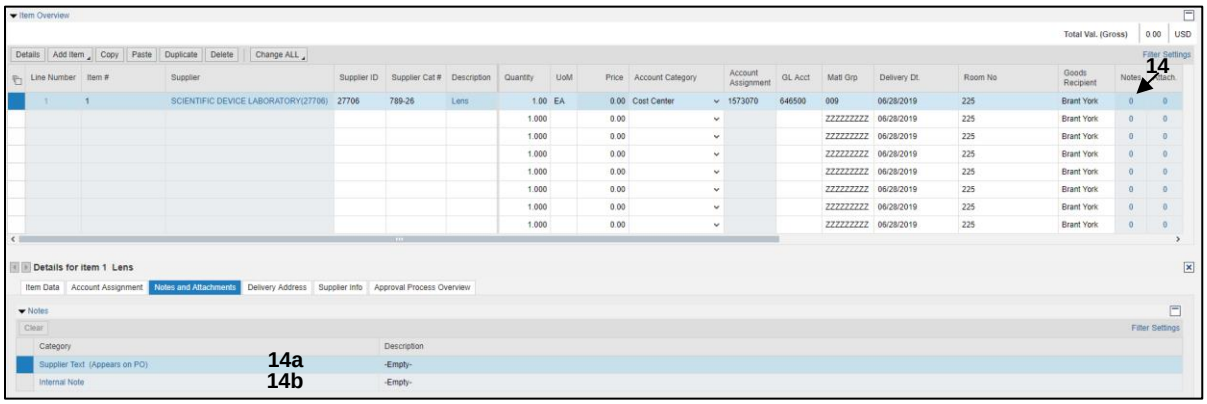


Shopping Continued…

14. Any quotes or other documentation received from suppliers should be referenced in the **Notes** section. These fields are row specific. Access **Notes** by selecting the hyperlink in the appropriate line. This opens the Details section below the Item Overview. Two types of notes may be recorded with the cart:

    a. Supplier Text should be used to communicate details about the order with the supplier. The text will appear on the face of the purchase order when it is sent to the supplier. This field could include reference quote numbers, promotional codes, and other supplier-specific information.

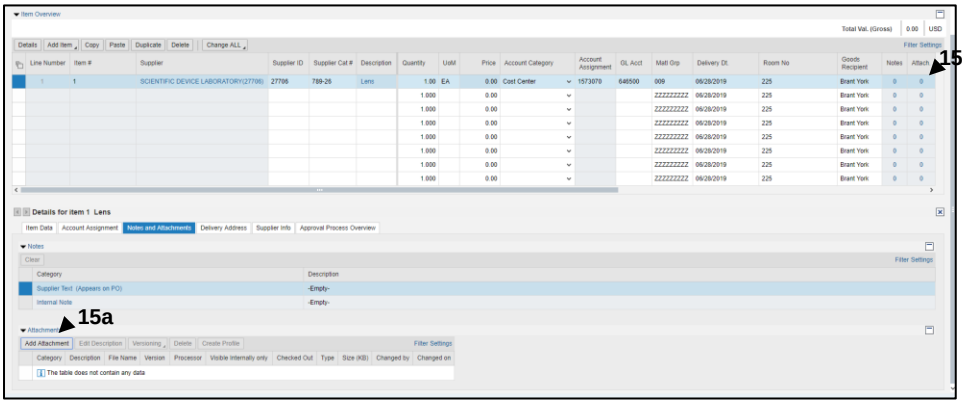
    b. Internal Notes are intended for communication. The notes are not visible on purchase orders sent to suppliers. Use this field for justifications, order notes, and other internal purposes.



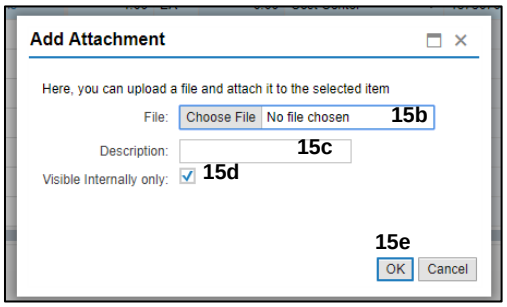
Shopping Continued…

15. Attach any supporting documentation, for example quotes or service agreements, to the cart by selecting the hyperlink associated with the line. This will open the Details Section below the Item Overview.

    a. Select **Add Attachment** to open the Add Attachment window.



    b. Use **Choose File** to search for the file you wish to attach. Once file is selected, select **Open**.
    c. Enter a description to help identify what is attached.
    d. The **Visible Internally only** check box is not used at Duke; therefore, checking or unchecking has no impact. If an attachment should be sent to the vendor, provide instructions in **Approval Notes** and flag the cart for **Special Handling.**
    e. Select **OK.** Repeat for each attachment.



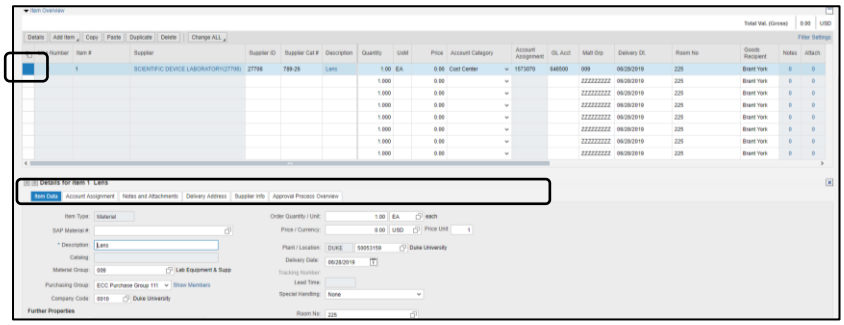
Shopping Continued…

16. To review or change the information for this line item, highlight the line and select Details. The information appears on the series of tabs below the Item Overview box.

    Note: *If you add attachments to the cart that need to be sent to the supplier, provide specific information in the comments indicating what needs to be sent and flag the cart for special handling. This will be discussed later in this guide.*

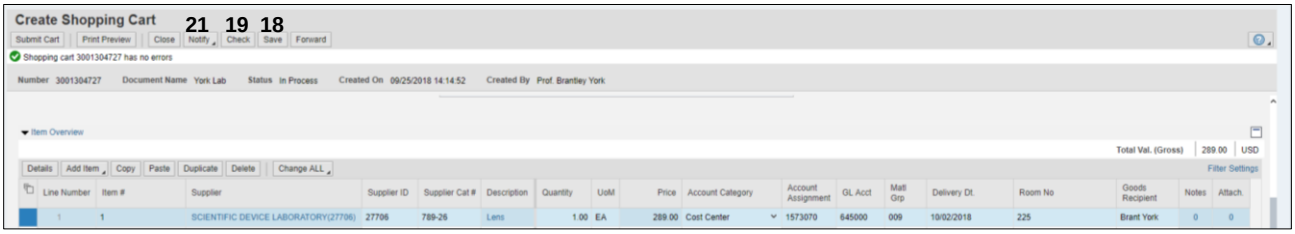
16

16



17. To place other items in the cart, continue entering the items on the subsequent lines following the steps outlined above.

20

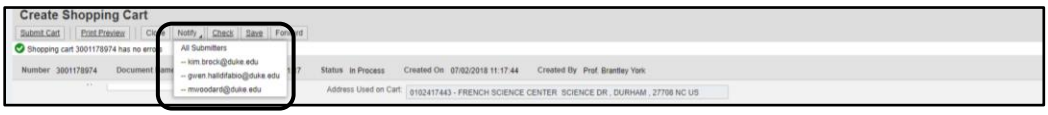


18. If you wish to save the cart, select **Save**. You may return to the cart later to add items or change information.

19. When you have completed the cart, select **Check** and make any corrections that are indicated.

20. **<u>If you are a Submitter</u>** and have completed the cart, select **Submit Cart.** This action will move the cart to the next step in the ordering process.

21. **<u>If you are a Shopper</u>** and have completed the cart, select **Notify** and select from the menu either:
    - All Submitters to notify all your Submitters that the cart is ready for review; or
    - The email address of just one Submitter to notify only him or her that the cart is ready for review.
    - This action saves the cart and sends an email to selected submitters.



22. Close your browser.

Shopping Continued…

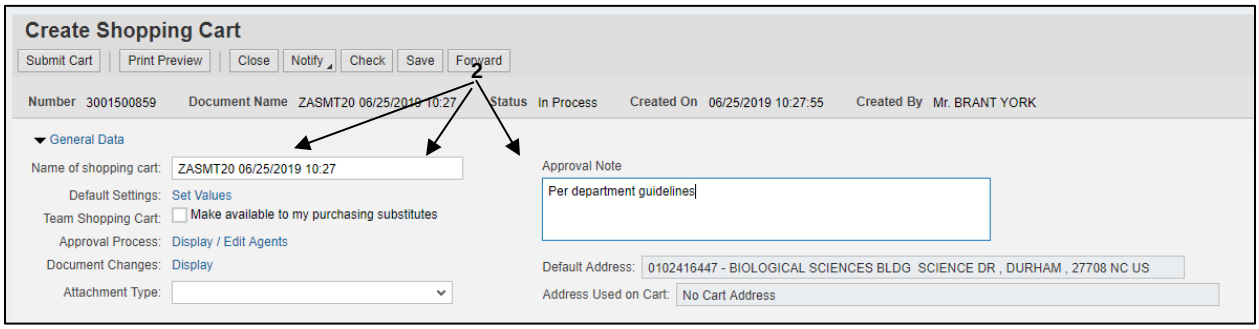
Creating a Standing Order Shopping Cart

Standing Orders may be placed for select goods and services departments routinely order. They are used primarily for maintenance contracts, repair services, dry ice, and gas cylinders. Standing Orders create purchase orders that allow for a specific dollar amount to be paid to a vendor over a specific period (not to exceed two years) of time. There is no specific quantity included in the purchase order; therefore, a goods receipt confirmation cannot be performed. It is important to remember that when a Standing Order is created in Buy@Duke, a financial commitment is created in SAP and represents a financial obligation for the department. Standing orders can only be expensed to one cost object; split funding is not allowed. If you have questions about whether a Standing Order is appropriate, please contact your department's business office.

Standing Orders follow the same approval process as other Buy@Duke carts before routing to Procurement and Supply Chain Management for final review and creation of a Purchase Order.

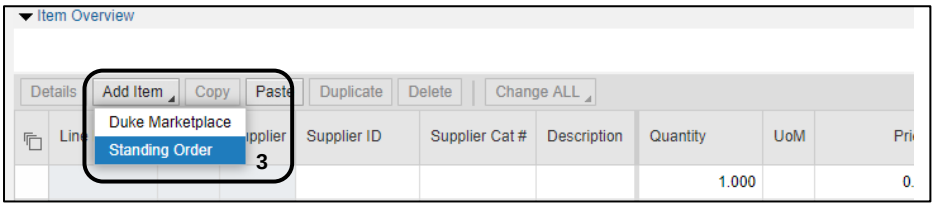
1. Select the **Create Shopping Cart** link to open a new page.

2. On the Create Shopping Cart page, review the information at the top and in the **General Data** section. Rename the cart, confirm the delivery address, and add a note to the Approval Note field following your department's guidelines.

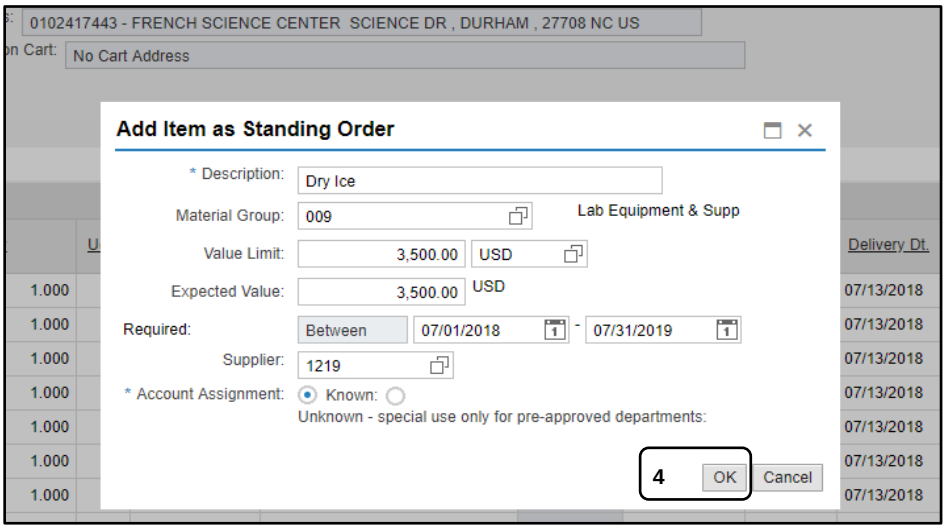


Shopping Continued…

3. Select **Add Item** and select **Standing Order**.



4. In the **Add Item as Standing Order** box, complete the fields as instructed below. Once all items are entered, select **OK.**



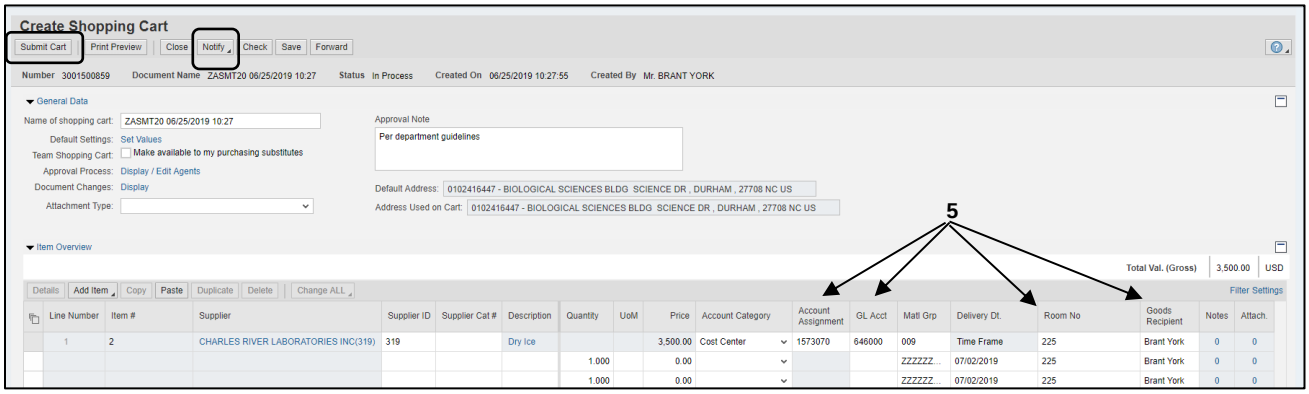
- **Description**: the goods or services to be ordered.
- **Material Group**: SAP material group that best fits the goods/services to be ordered.
- **Value Limit**: the upper limit of what you expect to spend for the duration of the Standing Order **(should match the Expected Value)**.
- **Expected Value**: the amount you actually expect to spend for the duration of the Standing Order **(should match the Value Limit)**.

  ***Note**:* *This value sets the Commitment amount created in SAP. It is important that Value Limit and Expected Value are the same.*

- **Required**: the date of the duration of the Standing Order, <u>not to exceed two years</u>. Not entering correct date values in these fields will result in an error and the order will not be processed.
- **Supplier**: the number that identifies the Supplier that is providing the goods or services.
- **Account Assignment**: Leave with the default **Known** setting unless instructed otherwise by your business office.

Shopping Continued…

5. The information entered creates the first line of the shopping cart. Default information established in Personalizations is added to the line. Change accounting information, room number, and goods receipt as necessary. Add notes or attachments if necessary. Submit the Shopping Cart per instructions outlined previously in this document.



***Note**:* *A standing purchase order only allows for one funding source. Split funding is not permissible.*

Functions to Refine Carts

Splitting Cost of Goods/Services between Two or More Cost Objects

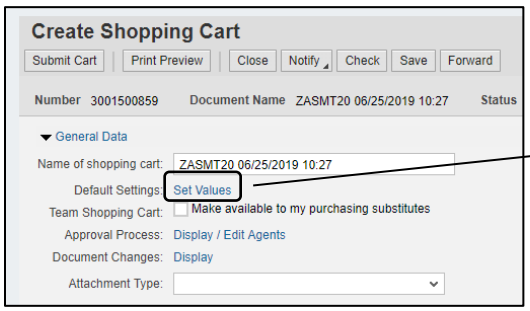
Financial account information for Buy@Duke line items is set by default using Personalizations or making changes to this information in the line item text. However, there may be instances when you want to change the default funding associated with a shopping cart. Additionally there may be instances where the cost of a good or service is to be paid by two or more Cost Objects, requiring you to make a manual change.

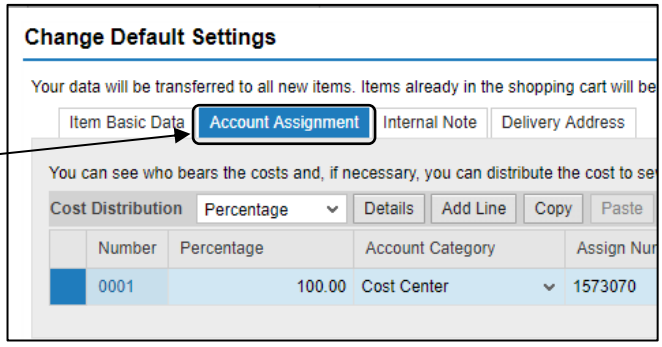
Note: *Carts created for standing purchase orders cannot be split-funded.*

1. The cost of goods/services can be changed or split for an entire shopping cart or by each line created in a cart.

   a. To change or split the cost of an entire cart, before placing goods/services in the cart, select **Set Values.** In the pop-up window, go to the to the **Account Assignment** tab.

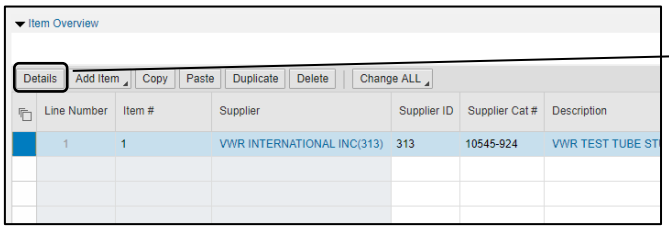
1a

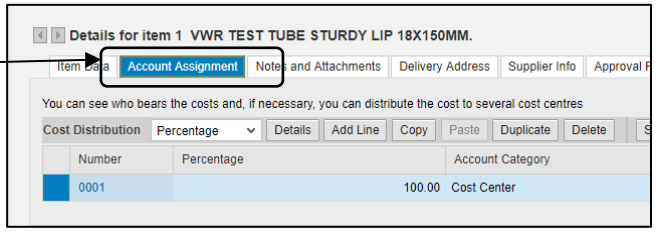




   b. To change or split the cost of a line in a shopping cart, place the good/service in the chart, highlight the line, and select **Details.** In the Details screen that opens, go to the to the **Account Assignment** tab.

1b

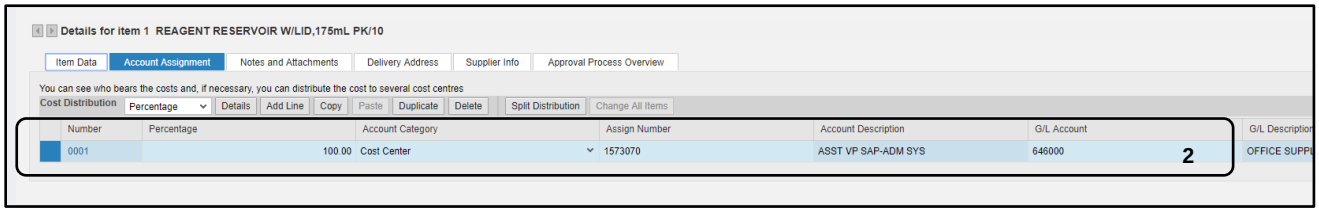




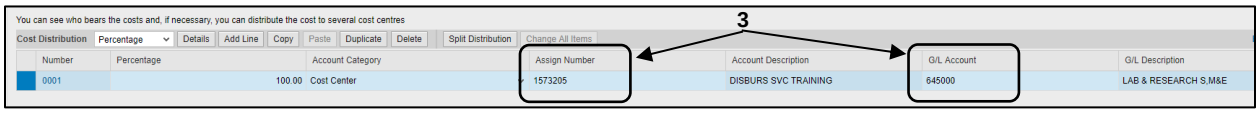
Note: *Once on the Account Assignment tab, the functionality is the same whether you are making changes to an entire shopping cart or to a line of the shopping cart.*

Functions to Refine Carts Continued…

2. Once on the **Account Assignment** tab, review the current account assignments. If you have not entered information, these assignments will be based on your defaults.

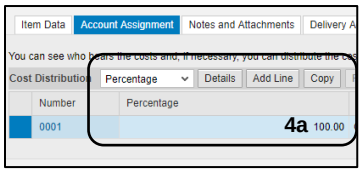


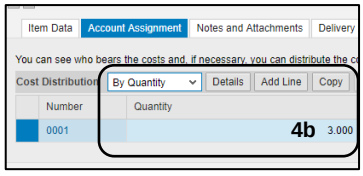
3. To add another combination of Cost Object and G/L Account (not to split fund), manually enter the Cost Object and G/L Account numbers directly in the **Assign Number** and **G/L Account** fields.

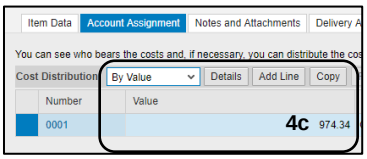


4. To **divide the payment** for an item between two or more Cost Objects, decide how you would like to split the cost and select that option from the Cost Distribution list:
   a. **Percentage**,
   b. **By Quantity**, *or*
   c. **By Value**.

   Depending on how you would like to split the cost distribution below, the second column will change.

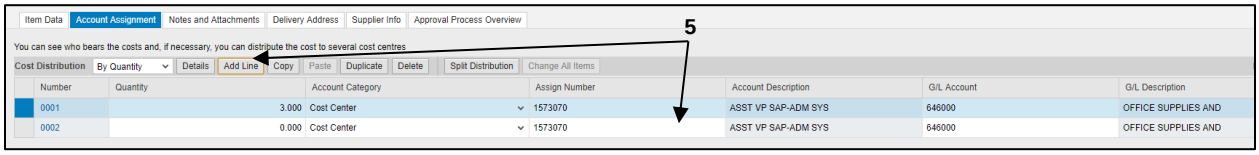






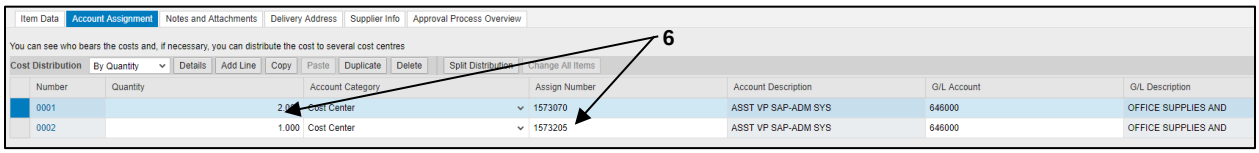
Note: *Most split-funding occurs by percentages which provides more flexibility in the event that the price or quantity changes between the time the order is placed and when it is received.*

5. Select **Add Line** to display an additional line.

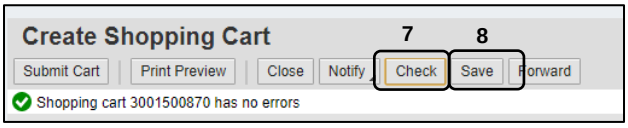


Functions to Refine Carts Continued…

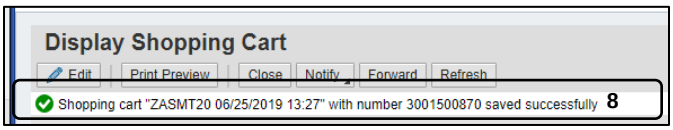
6. Change the amounts in the second column (Percentage, Quantity, or Value), the Account Category, and the Cost Object in the Assign Number field. Continue to select **Add Line** and complete the fields as necessary to account for the total quantity, 100% of the funding, or the total dollar amount.



7. Select **Check** at the top of the screen and look in the message box for any actions you must take for this line item.



8. Select **Save** to save the account assignment changes. Once saved you will see a successful save message.



Functions to Refine Carts Continued…

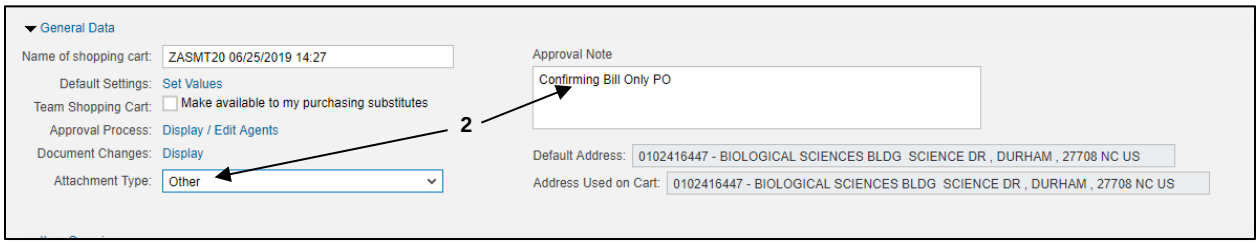
Special Handling: Creating a Confirming Order-Bill Pay (Pay Invoice)

Buy@Duke users may use the system to pay invoices when the invoice is presented at the time the goods or services are delivered or before a Purchase Order has been created (e.g., maintenance, contract work, catering). This requires creating a cart that is flagged as a **Confirming Order-Bill Only** order.

Note: *All carts with a Special Handling designation will route to Procurement for further processing. Carts that are not flagged appropriately will likely result in payment delays to vendors.*

1. Select the **Create Shopping Cart** link to open a new page.

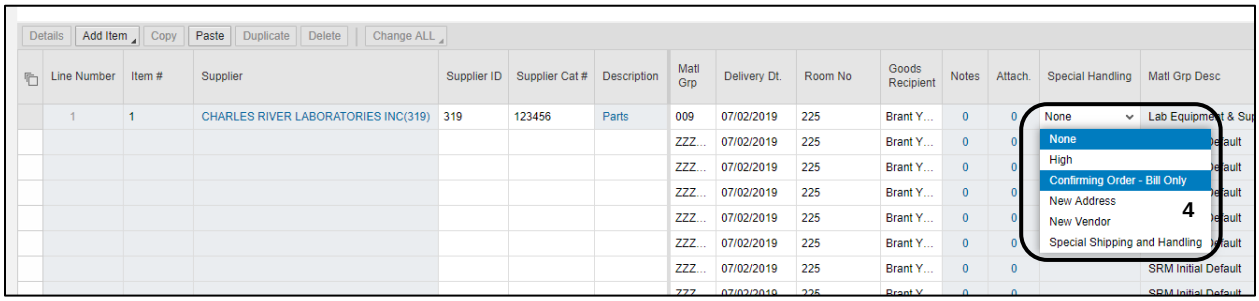
2. In the **Approval Note** field indicate the shopping cart is being used to create a Confirming Bill Only purchase order. In **Attachment Type**, select Other to indicate that an invoice will be attached to the cart.



3. Create a **Text Order** as instructed previously in this guide, but entering each information on each line of the invoice and the price.

4. In the **Special Handling** column, click on the drop down icon and select **Confirming Order-Bill only** from the resulting list.

Note: *In most browser screens, you will need to scroll to the right to view the column. In the event the special handling dropdown menu does not display, select **Check** at the top of the screen and select the dropdown a second time.*

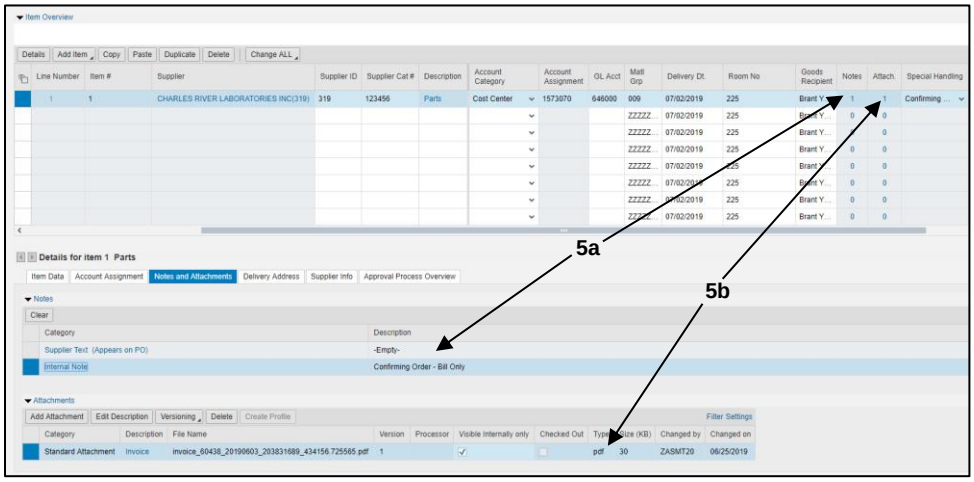


Functions to Refine Carts Continued…

5. Using **Notes and Attachments:**

   a. Add a note in the **Internal Note** field indicating that this is a confirming order for the payment of an invoice.

   b. Using the **Add Attachment** button, attach a scanned copy of the invoice. Attachments **must** be PDF files.

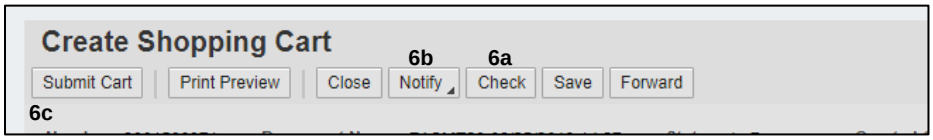


6. As with all carts, do the following:

   a. **Check** the cart to confirm there are no errors.

   b. Shoppers will **Notify** their submitter that the cart is ready for review.

   c. Submitters will **Submit Cart** into workflow for approval.



Note: *After receiving department approvals, the cart routes to Procurement for processing. A Purchase Order will be created, beginning with the numbers 8505xxxxxx. The Purchase Order* ***will not*** *be sent to the Supplier, preventing an additional order. Once the Purchase Order number has been assigned, the invoice will be sent to Corporate Accounts Payable, which will process the invoice for payment.*

Functions to Refine Carts Continued…

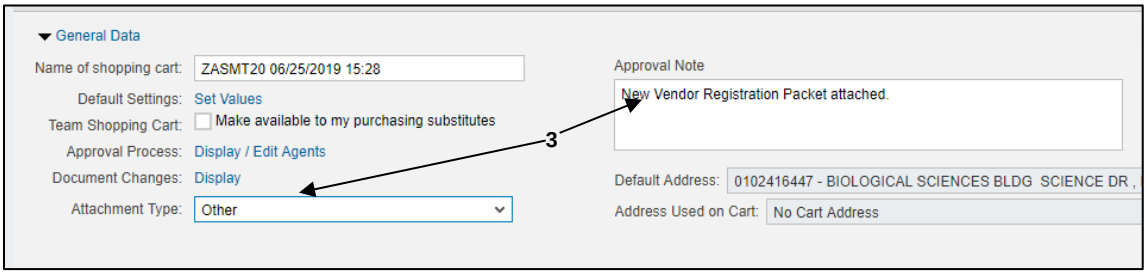
Special Handling: New Vendor

Buy@Duke users may request the addition of a new vendor to SAP, Duke's system of ordering goods/services, accepting Purchase Orders, and paying invoices.

1. Before creating the shopping cart, obtain a Vendor Registration Forms Packet from finance.duke.edu or from Procurement by emailing procurement@duke.edu. Send the packet to the new vendor and ask that it be returned to you. You will need to attach information in this packet to the Buy@Duke shopping cart.

2. Select the **Create Shopping Cart** link to open a new page.

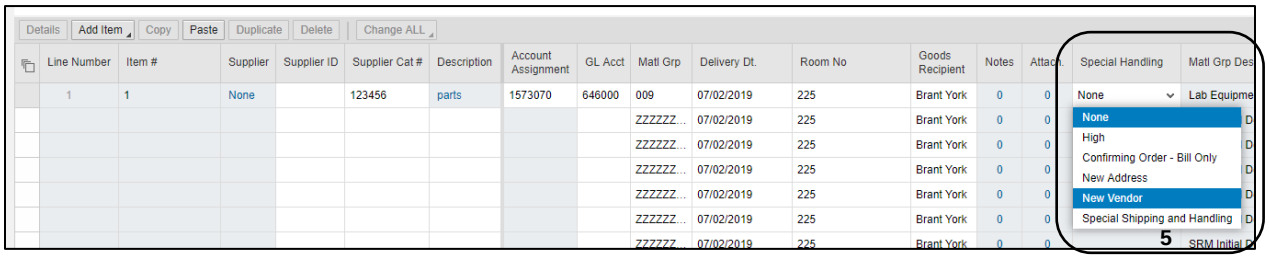
3. In the **Approval Note** field, indicate the shopping cart is being created for a new vendor. In **Attachment Type**, select Other to indicate that vendor registration information will be attached to the cart.



4. Create a **Text Order** as shown previously in this guide; however, since the vendor you want to use has not been assigned a SAP vendor number, leave the **Supplier** column blank.

5. In the **Special Handling** column, click on the drop down icon and select **New Vendor** from the resulting list.

Note: *In most browser screens, you will need to scroll to the right to view the column.*

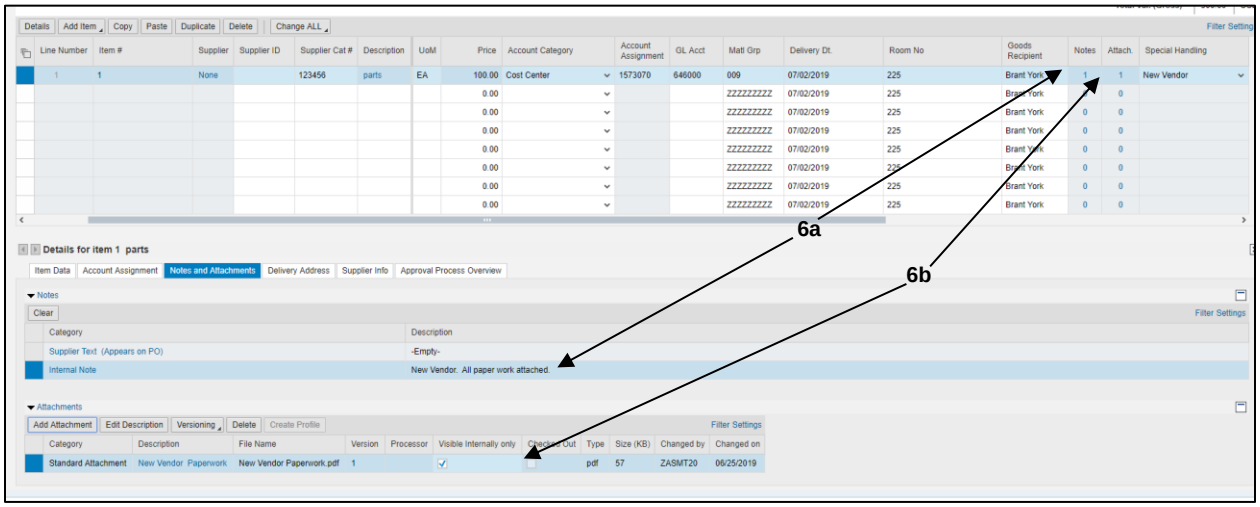


Functions to Refine Carts Continued…

6. Using **Notes and Attachments:**

    a. Add a note in the **Internal Note** field indicating that this is a confirming order for the payment of an invoice.

    b. Using the **Add Attachment** button, attach a scanned copy of the invoice.

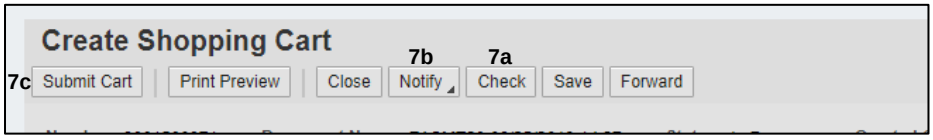


7. As with all carts,

    a. **Check** the cart to confirm there are no errors.

    b. Shoppers will **Notify** their submitter that the cart is ready for review.

    c. Submitters will **Submit Cart** into workflow for approval.



Functions to Refine Carts Continued…

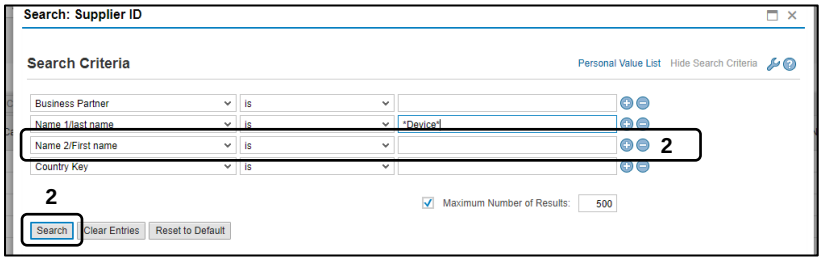
Creating a Personal Values List

The **Personal Value List (PVL)** allows users to save information they use frequently in an easy-to-use list. This makes it easier to find the values for repeated uses. The values that can be stored in the Personal Values List include: Supplier ID, Unit of Measure, and Material Group.

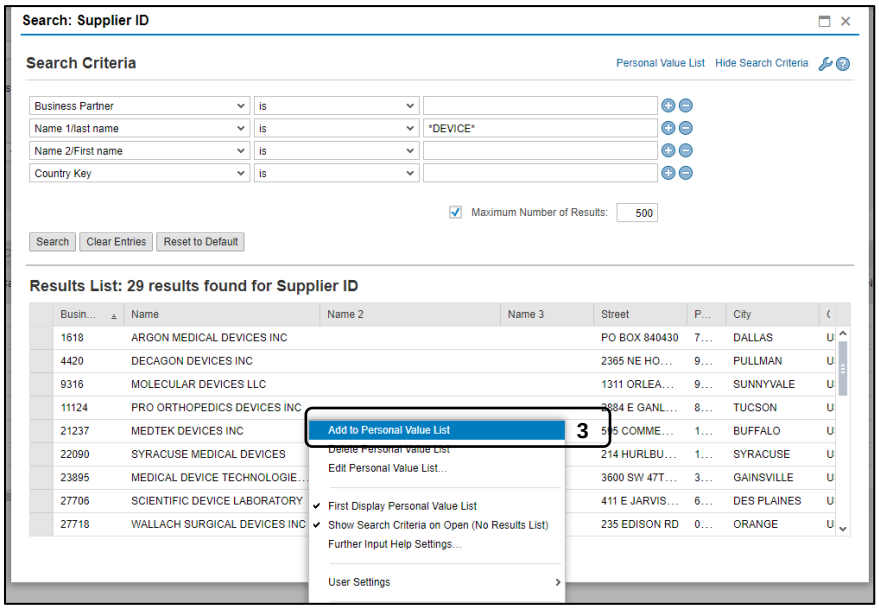
<u>Supplier ID PVL</u>

1. On the Create Shopping Cart screen, click in the Supplier ID column and select the search button.

2. In the resulting search box, enter a portion of the supplier's name in the second field on the **Name 1/last name** line and click the **Search** button. Remember to use asterisks (*) as text wild cards.

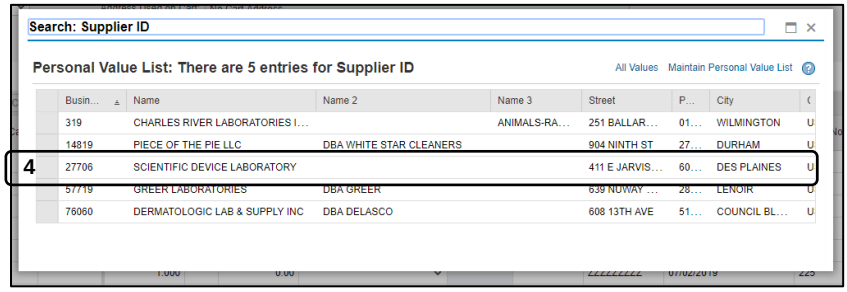


3. When you find the desired item in the subsequent list, <u>right click</u> on the line and select **Add to Personal Value List**.

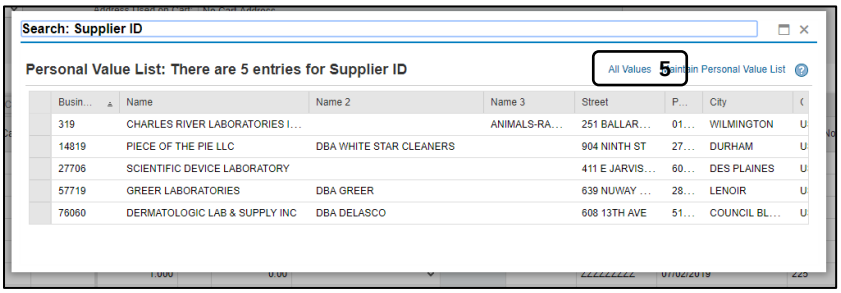


Functions to Refine Carts Continued…

4. Returning to the **Create Shopping Cart** screen, select the search button again in the Supplier ID field. This action will open a box that contains the PVL you have created. Select the line of the Supplier you wish to use.



5. In subsequent visits, you may wish to search for values beyond your PVL. To access the search, select the **All Values** link.



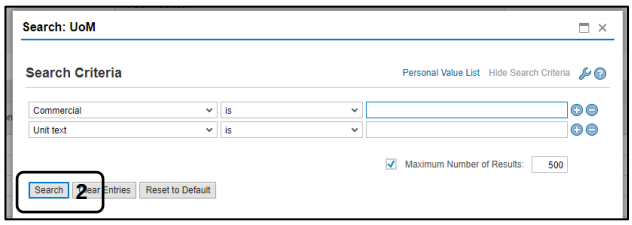
Note: *To add more Supplier IDs to your PVL, search for new values as outlined above.*

Functions to Refine Carts Continued…

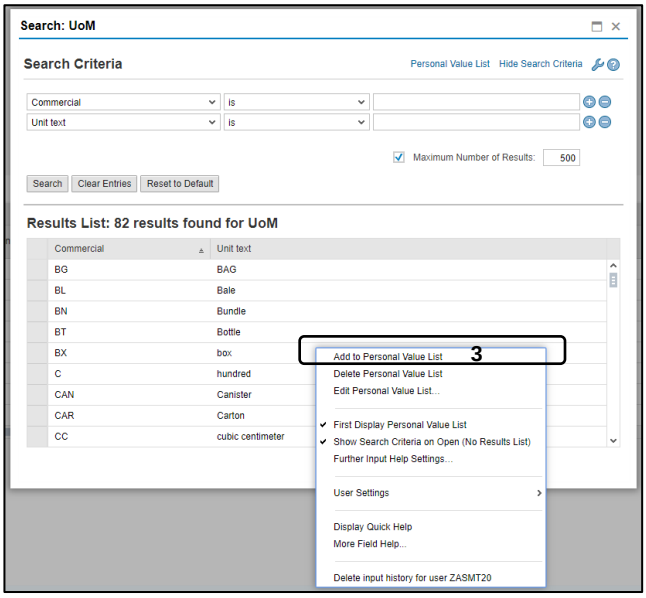
Unit of Measure PVL

1. On the Create Shopping Cart screen, click in the **UoM** column and click on the search button.

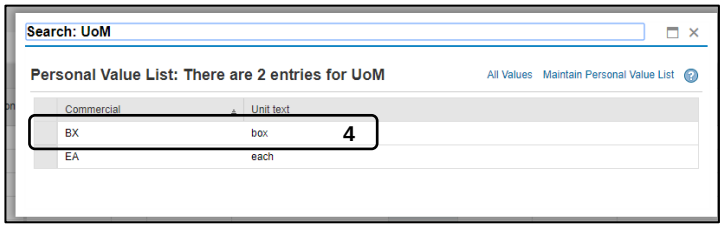
2. In the resulting search box, click the **Search** button.



3. When you find the desired unit of measure in the subsequent list, right click on the line and select **Add to Personal Value List**.

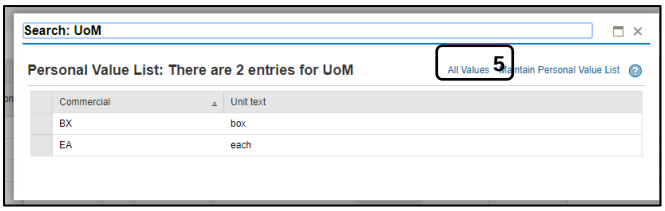


4. Returning to the **Create Shopping Cart** screen, select the search button again in the UoM field. This action will open a box that contains the PVL you have created. Select the UoM you wish to use.



Functions to Refine Carts Continued…

5. In subsequent visits, you may wish to search for values beyond your PVL. To access the search, select the **All Values** link.



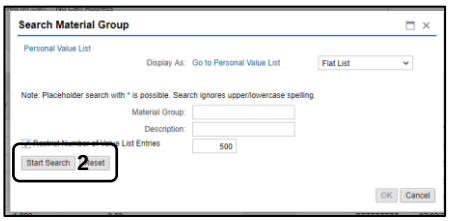
Note: *To add more UoMs to your PVL, search for new values as outlined above.*

Functions to Refine Carts Continued…

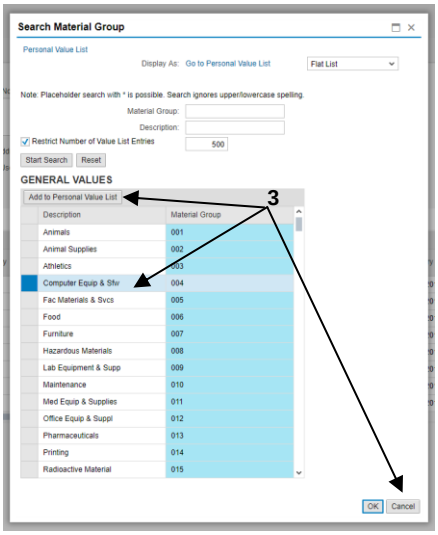
Material Group

1. On the Create Shopping Cart screen, click in the **MatlGrp** column and click on the search button.

2. In the resulting search box, click the **Start Search** button.

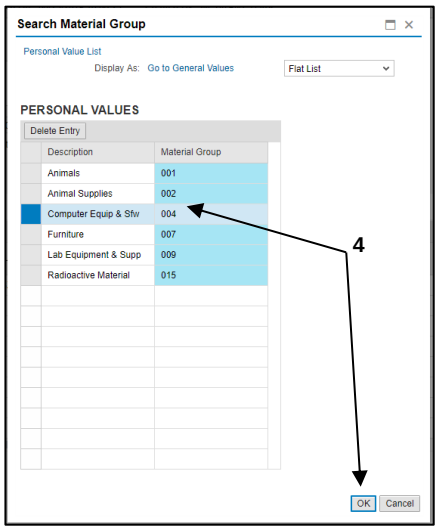


3. In the resulting **Search Material Group** list, search for the Material Groups designated by your department for the items you order. If Material Groups have not been designated, select the most appropriate designation from the first nineteen groups listed alphabetically and numbered 001-019. When you find the preferred Material Group, highlight the line and click the **Add to Personal Value List** button. Select **Cancel** after receiving the message the item has been added.

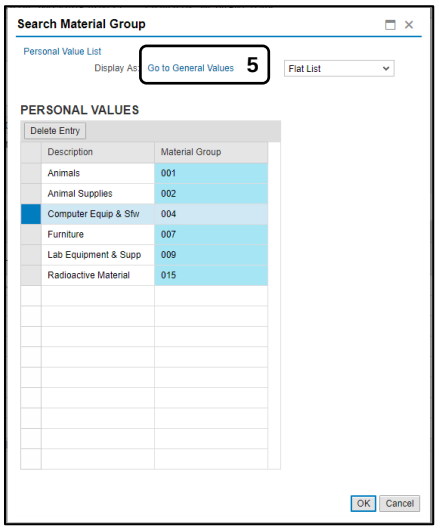


Functions to Refine Carts Continued…

4. Returning to the **Create Shopping Cart** screen, select the search button again in the MatlGrp field. This action will open a box that contains the PVL you have created. Select the line with the Material Group you wish to use. Select **OK**.



5. In subsequent visits, you may wish to search for values beyond your PVL. To access the search, select the **Go to General Values** link.



Note: *To add more Material Groups to your PVL, search for new values as outlined above.*

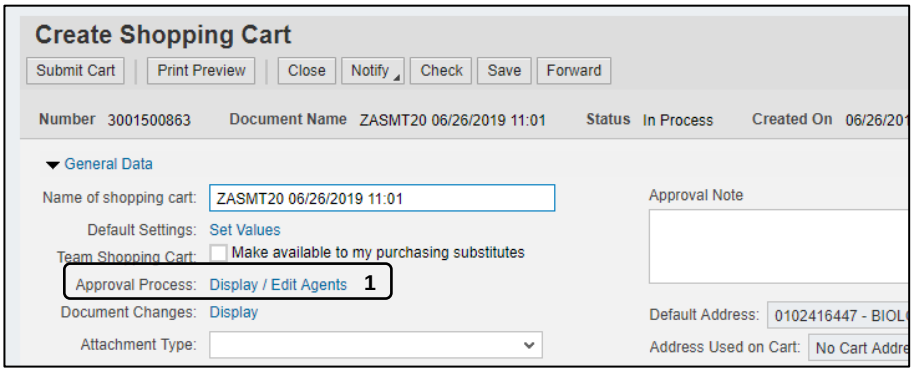
Functions to Refine Carts Continued…

Adding an Ad Hoc Approver or Reviewer

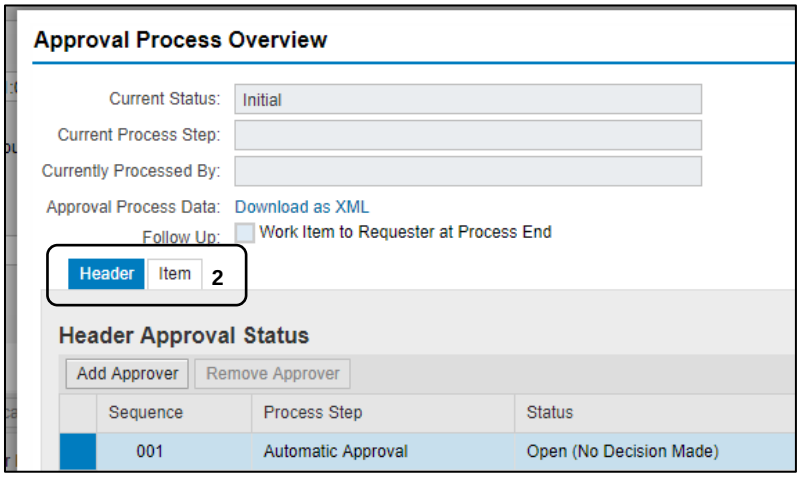
There may be situations when a Shopper, Submitter, or Approver wishes to have another person Approve or Review a shopping cart. . In those instances, the user can add an Ad Hoc Approver or Reviewer for the specific cart. Ad Hoc Approvers must take action to approve the cart, while Ad Hoc Reviewers may simply review the contents of the cart without taking action.

1. When creating the cart before submitting it into the workflow, select the **Approval Process: Display/Edit Agents** hyperlink.

   Note: *Ad-Hoc Approvers or Reviewers may also be added to carts after they have been submitted but before Approval or after they have been saved. In these cases, open the cart and select the Edit button that will appear in the upper left corner. Then follow the steps in this section. Note that this process will restart the workflow which will include the new assignment you are making.*



2. From the **Approval Process Overview** window, verify you are on the **Header** tab.

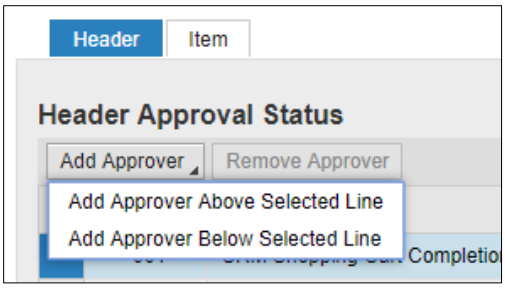


Functions to Refine Carts Continued…

3. To add an Approver, select **Add Approver.** If an approver has not been assigned to the cart, skip to step 4. If an approver has been assigned to the cart, a triangle will appear in the lower right corner of the **Add Approver** button and select either:

    a. **Above Selected Line** if the new Approver will act <u>before</u> the Approver(s) indicated on the line; or

    b. **Below Selected Line** if the new Approver will act after the Approvers(s) indicated on the line.

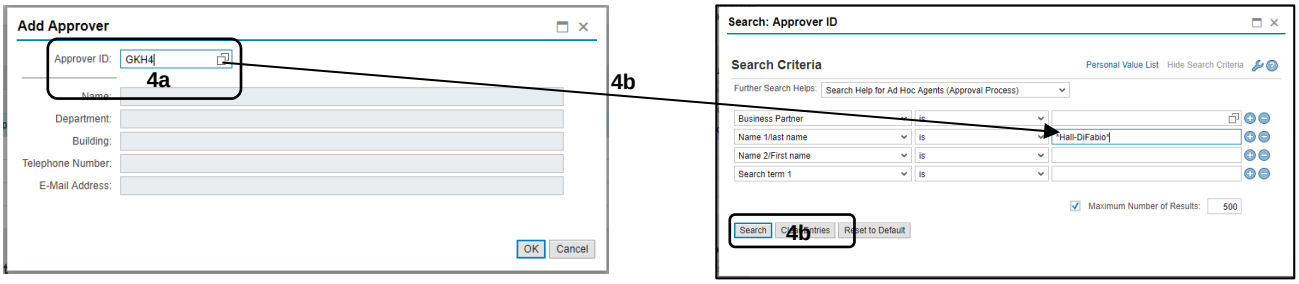


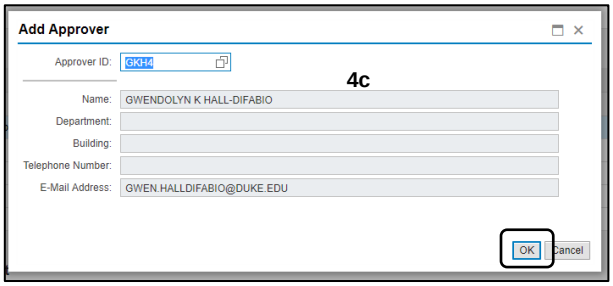
4. In the **Add Approver** box:

    a. Enter the approver's Net ID; or

    b. Select the search button to search for the Net ID by name.

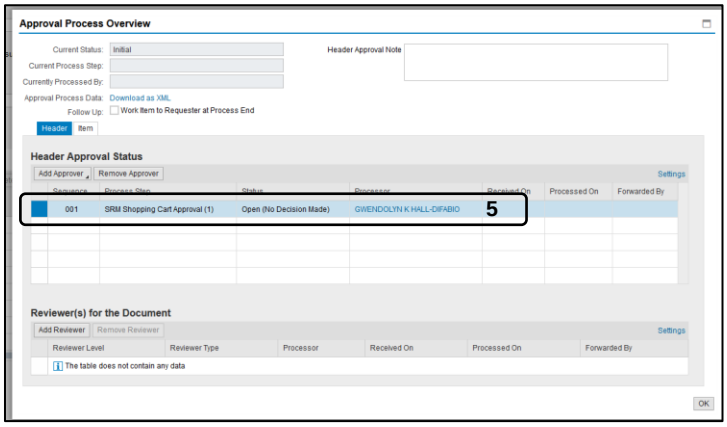
    c. Select **OK** to accept.



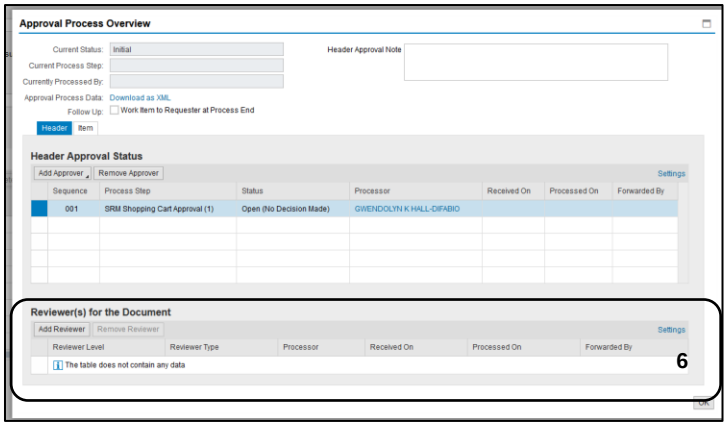


Functions to Refine Carts Continued…

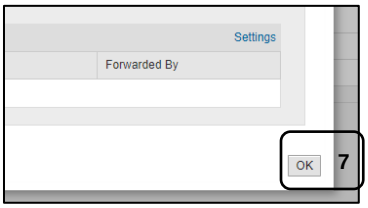
5. The Ad Hoc Approver's name will populate the form.



6. Follow steps 3-5 if you want to add a **Reviewer for the Document.**



7. Once all **Approvers and Reviews** are added, select **OK.**



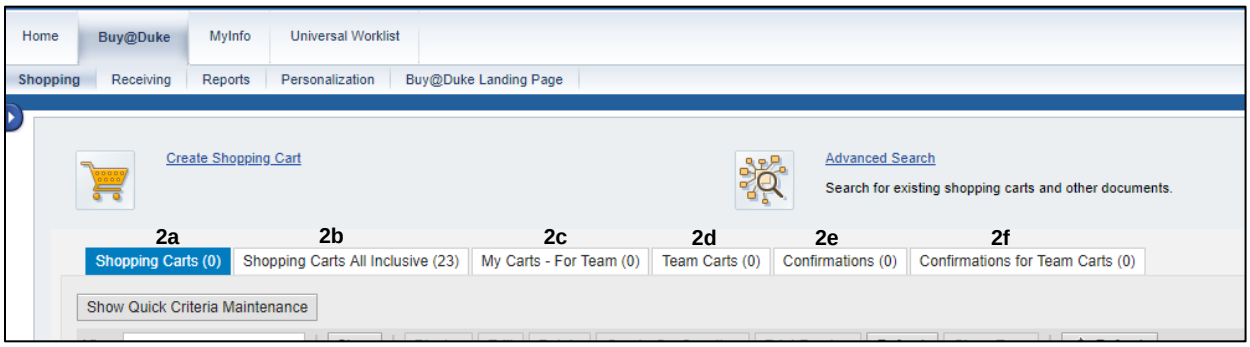
8. From this point, you can continue working with the shopping cart. This specific cart will route to the Ad Hoc Approver or Reviewer based on their position in the workflow.

Working with Completed Carts

Checking the Status of Carts

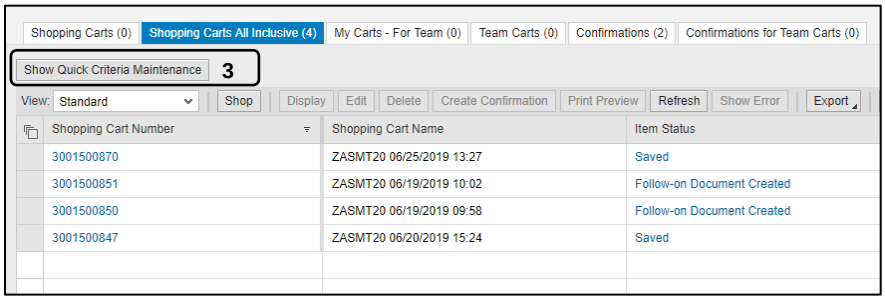
1. On the Shopping page, you can review the list of shopping carts displayed in the table.

2. Use the tabs to display shopping carts.
   a. **Shopping Carts** tab to display the carts that you created;
   b. **Shopping Carts All Inclusive** tab to display the carts you created, and the carts created by your Team Members;
   c. **My Carts-For Team** tab to display the carts you made available to your Team Members;
   d. **Team Carts** tab to display the carts that were created by your Team Members;
   e. **Confirmations** tab to display the shopping carts that are awaiting Goods Receipt; and
   f. **Confirmations for Team Carts** tab to display the Team shopping carts that are awaiting Goods Receipt.



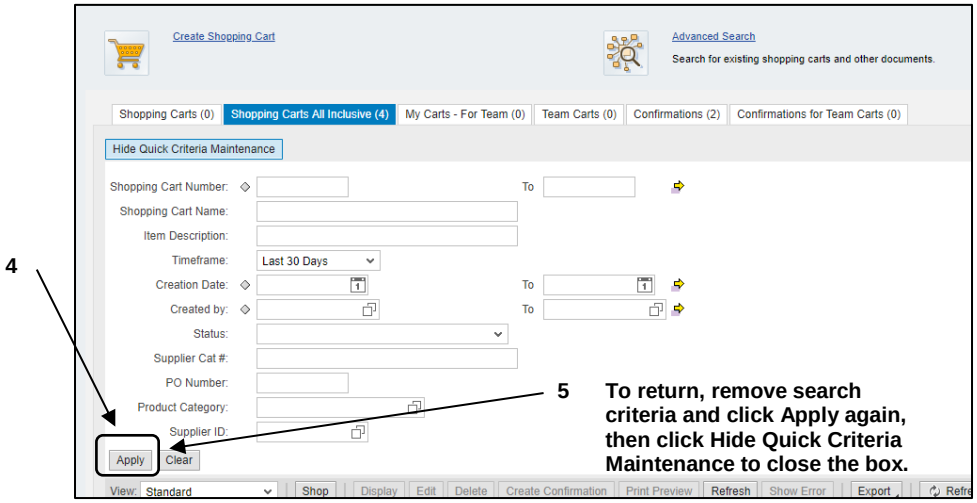
Note: *You will need to select Refresh or select the tab to display the number of carts in each category.*

3. To narrow or expand the list of shopping carts displayed on each tab, select **Show Quick Criteria Maintenance.**



Working with Completed Carts Continued…

4. Select a single criterion or various criteria to use for the search (e.g., search by date, using either the Creation Date or Timeframe). After entering your search criteria, select **Apply**.

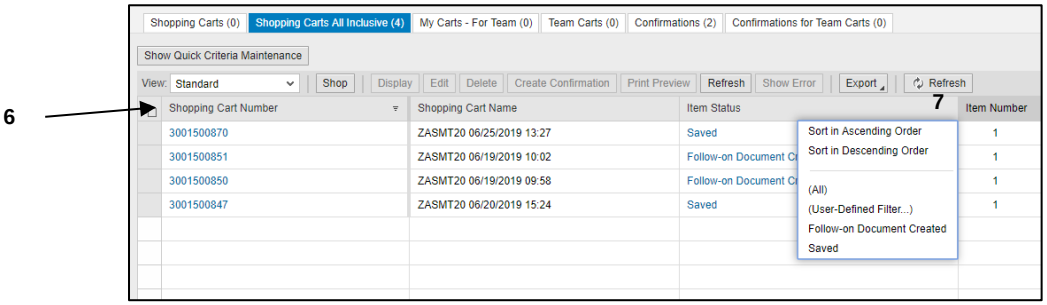


Note: *The default view displays the carts created in the past 30 days. Use the dropdown menu to change the timeframe.*

5. To return to the original list display, follow these steps:
   - Remove the search criteria.
   - Click the **Apply** button.
   - Then click the **Hide Quick Criteria Maintenance** button to close the box.

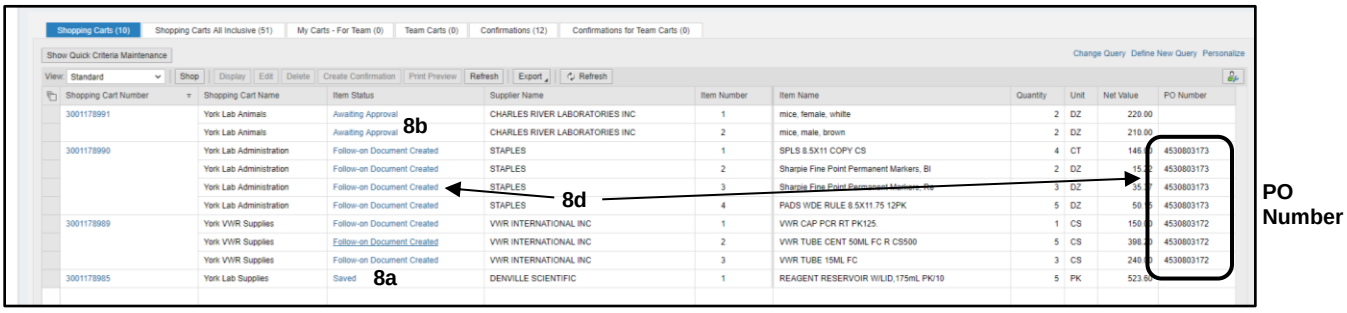
6. Once the list of carts has been selected, notice the column headings.

7. The information in the columns may be sorted in numerical or alphabetical (and the reverse) order by clicking on the column header.

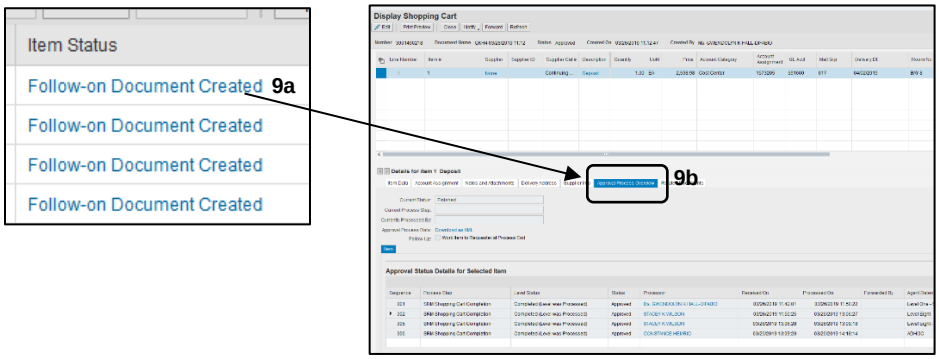


Working with Completed Carts Continued…

8. Review the Item Status entries to check on a cart's status. The most common statuses are:
   a. **Saved,** which, for a Shopper, indicates that the shopping cart is waiting for your Submitter to act or indicates a cart has been created and simply saved.
   b. **Awaiting Approval**, which indicates that cart has been submitted into workflow, but is not fully approved.
   c. **In Purchaser's Worklist**, which indicates that the purchase order has been fully approved but is awaiting sourcing by Procurement to generate the purchase order number (not shown below).
   d. **Follow-on Document Created**, which indicates that a purchase order has been created and sent to the supplier. Based on your screen display, scroll to the right to find the **PO Number** column.
   e. **Delete**, which indicates you deleted the cart.
   f. **Approve**, which indicates the is approved, but the system has not created a purchase order yet. The system may take a few minutes to create a purchase order.
   g. **Reject,** when indicates an approver rejected the cart.
   h. **In Your Inbox,** which indicates there is a task in your Universal Worklist awaiting action.



9. To see who has a cart in the **Awaiting Approval** status or who approved a cart in the **Follow-on Documents Created** status:
   a. Select the hyperlink in the Item Status Column
   b. Select the **Approval Process Overview** tab in the **Details** section.
   c. Review the **Processor** column to see who has the cart and who has approved the cart.

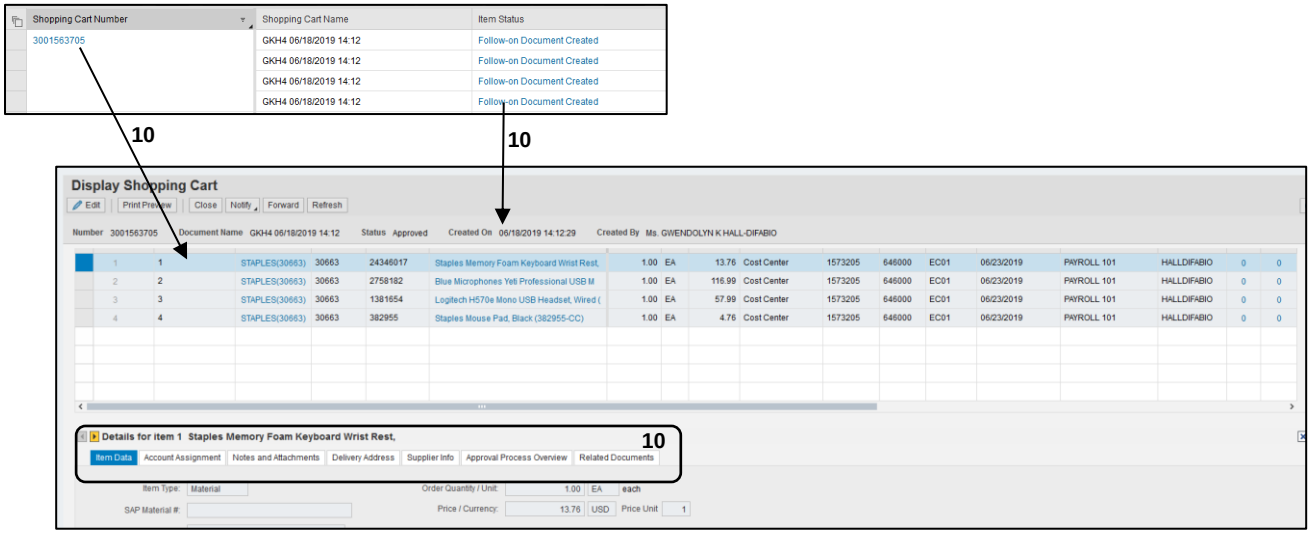


Working with Completed Carts Continued…

d. In the **Status** column, the most common statuses include:
   - **Saved,** which, for a Shopper, indicates that the shopping cart is waiting for your Submitter to act or indicates a cart has been created and simply saved.
   - **Awaiting Approval,** which indicates the cart was submitted into workflow but is not fully approved. The **Processor** is the person with the cart.
   - **In Purchaser's Worklist**, which indicates that the purchase order has been fully approved but is awaiting sourcing by Procurement to generate the purchase order number (not shown below).
   - **Follow-on Document Created**, which indicates that a purchase order has been created and sent to the supplier. Based on your screen display, scroll to the right to find the **PO Number** column.
   - **Deleted**, which indicates you deleted the cart.
   - **Release rejected**, which indicates the cart has been rejected.
   - **Inquired**, which indicates an approver has requested additional information or asked a question prior to approval.

Working with Completed Carts Continued…

10. Select the **Shopping Cart number** or the **Item Status** to see the details of the goods/services included in the shopping cart. Use the tabs in **Details** to few additional information about the cart.



11. Once you have finished checking the status of your carts, close your browser or continue working in Buy@Duke.

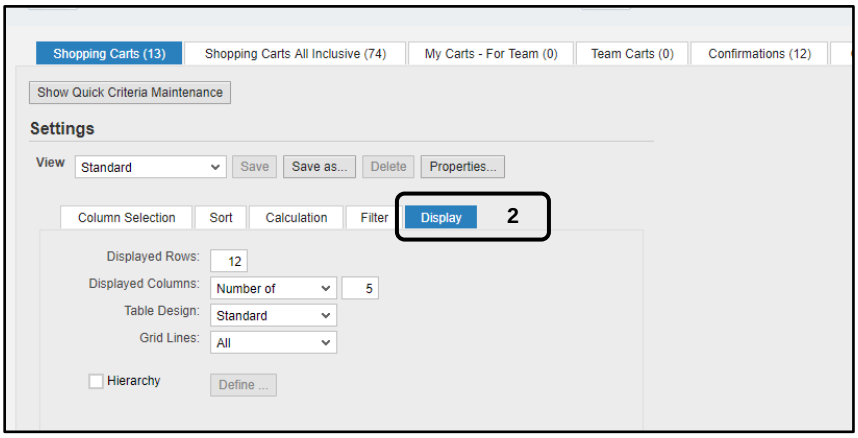
Working with Completed Carts Continued…

Changing View of Carts in Work List

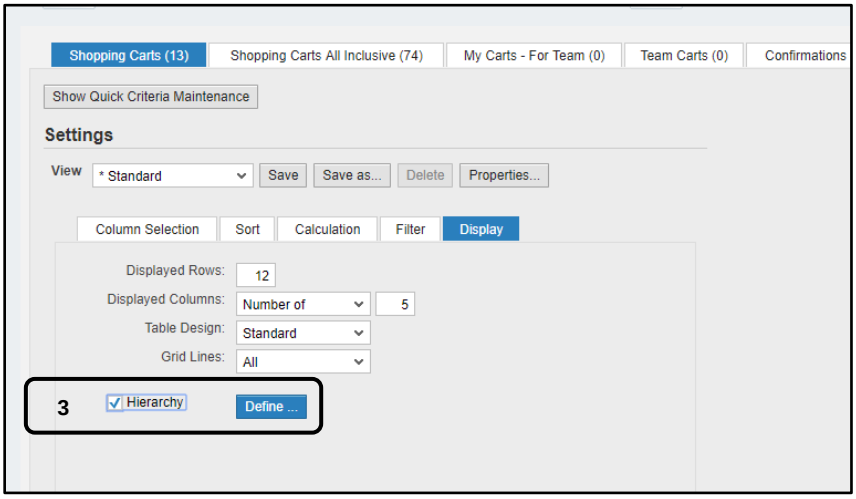
The shopping cart work list on the Buy@Duke Shopping page can be customized to meet the needs of an individual user.

1. Select the **Open Setting Dialog** icon on the far right of the screen.

2. In the resulting screen, select the **Display** button.

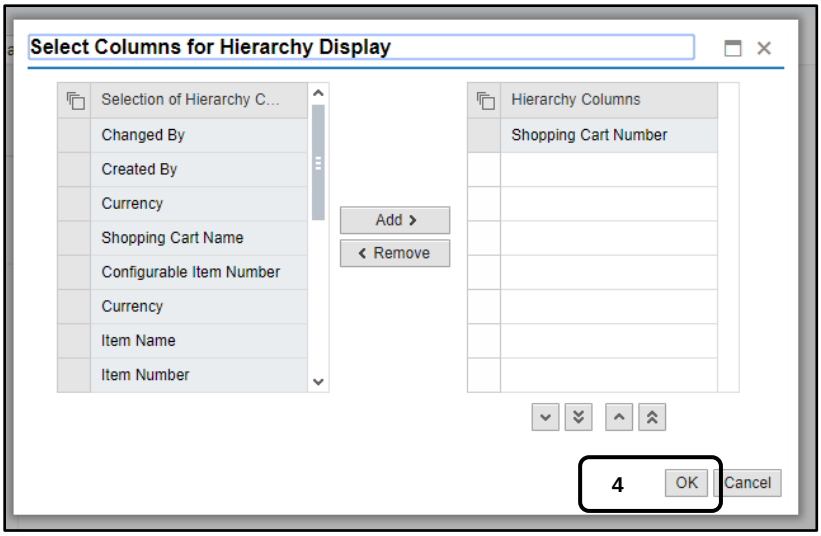


3. Check the **Hierarchy** box and click the **Define** button.

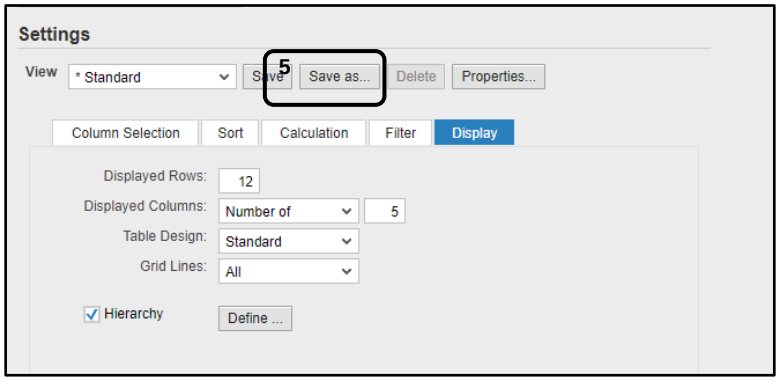


Working with Completed Carts Continued…

4. In the resulting screen, move the rows from the left box to the right box to build a hierarchy. Once you have selected all the columns in the order you wish, click **OK**.



5. To save the settings, select **Save As**.



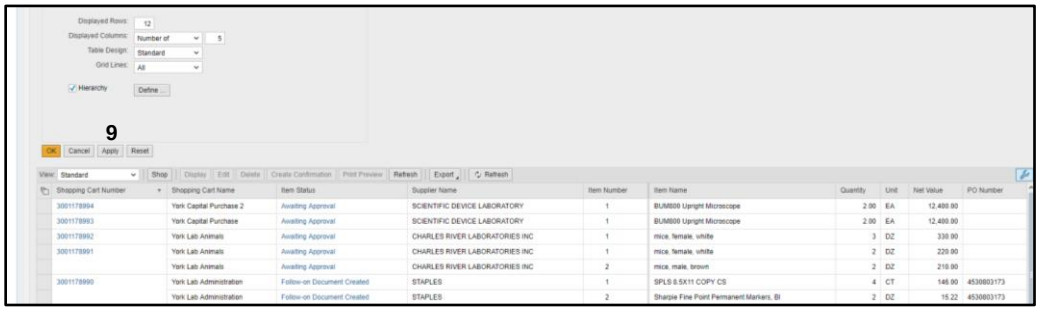
6. Enter a name in the **Description** field.

7. If you would like to have this customized view as the first view you see when you log into Buy@Duke, check the **Initial View Box**.

8. Click **OK.**

Working with Completed Carts Continued…

9. Returning to the Setting screen, click **Apply** to display the changes.



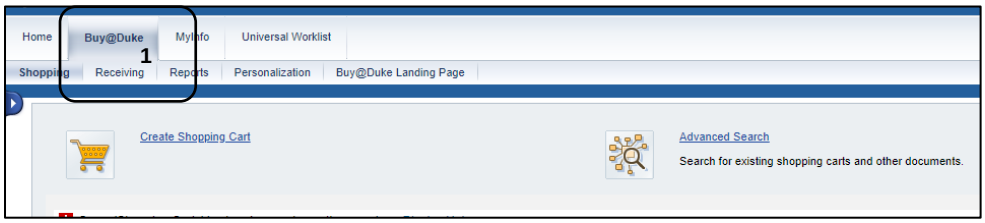
10. Click on the Shopping page to continue using Buy@Duke.

Goods Receipt and Return

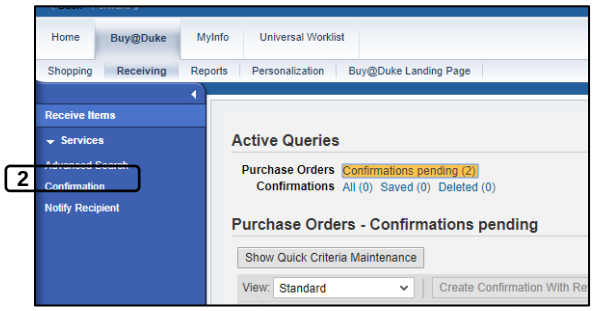
Entering Goods Receipt/Confirmation Status

A Goods Receipt is the confirmation that the items you ordered have been delivered, are correct, and are in working order. If your purchase order requires goods receipt, when your order arrives, you should locate the packing slip in the box and check the items against the slip. Then log into Buy@Duke and follow the steps in this section.

1. On the Buy@Duke tab, select the **Receiving** page.

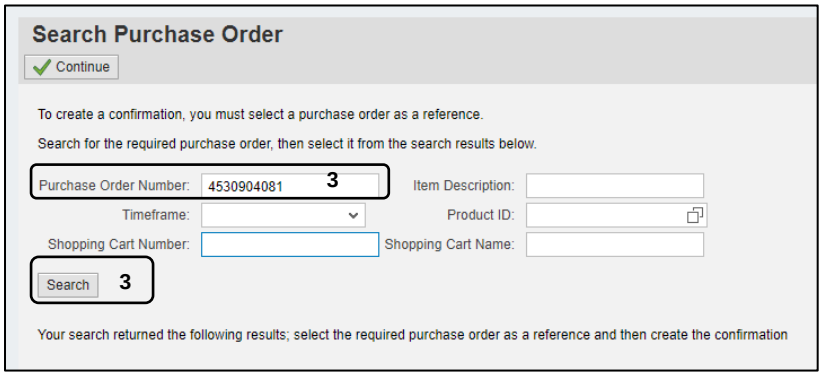


2. Select the **Confirmation** link in the left-hand sidebar.



3. In the resulting **Search Purchase Order** window, enter the purchase order number in the **Purchase Order Number** box. Select **Search** to retrieve the purchase order.

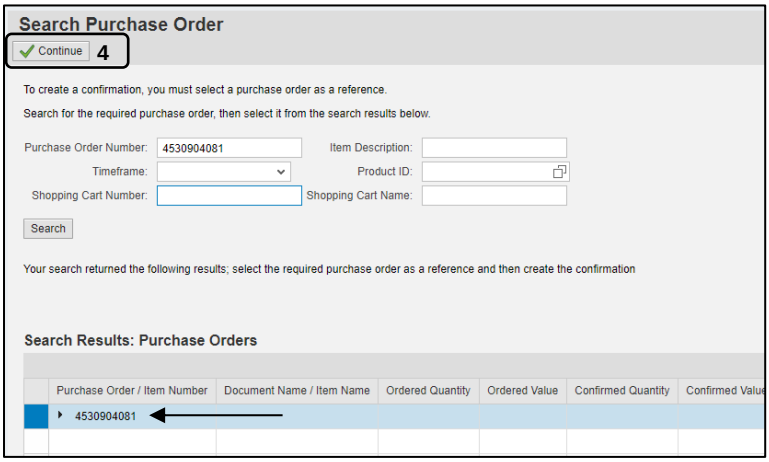
Note: *You will find the Purchase Order number on the packing slip that came with the items.*



Goods Receipt and Returned Continued…

4. When the purchase order is returned, highlight the line containing the purchase order number. Select **Continue.**

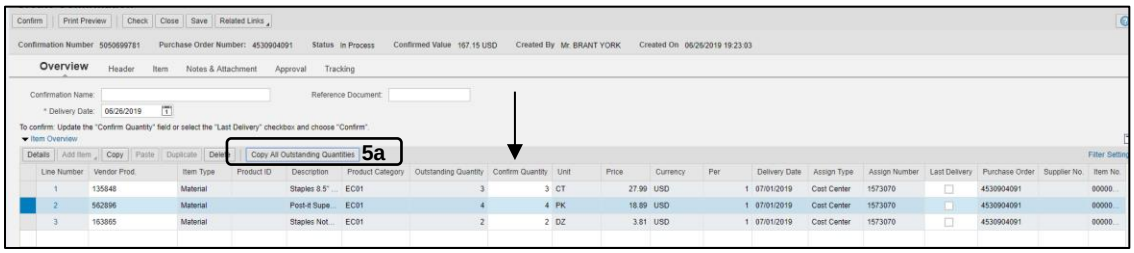
Note: *If no purchase order number is returned, either the confirmation has been completed or the purchase order does not require a confirmation.*



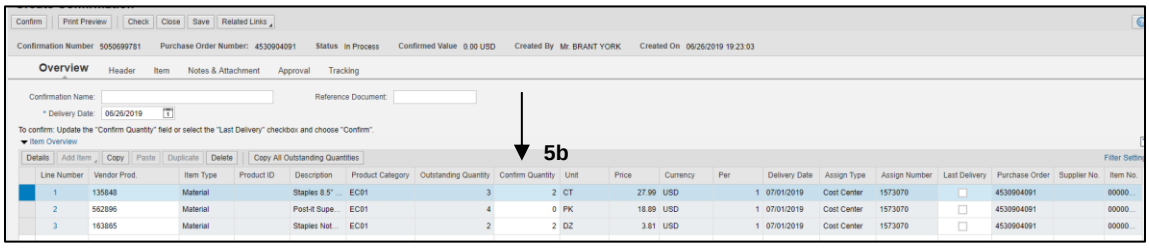
Goods Receipt and Returned Continued…

5. To confirm the quantity received:

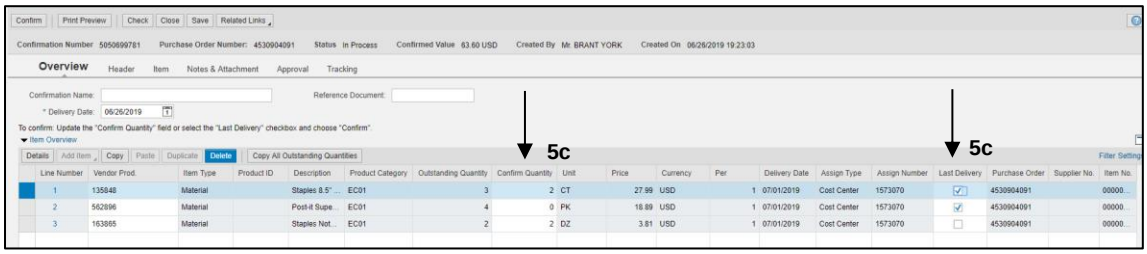
   a. Highlight a line and select **Copy All Outstanding Quantities** if you received all items for all lines of the purchase order.



   b. If you did not receive all items, for all lines of the purchase order, in the **Confirm Quantity** column, manually enter the quantity that you received. In this situation, it will be necessary to perform another goods receipt confirmation when the remaining items are delivered.

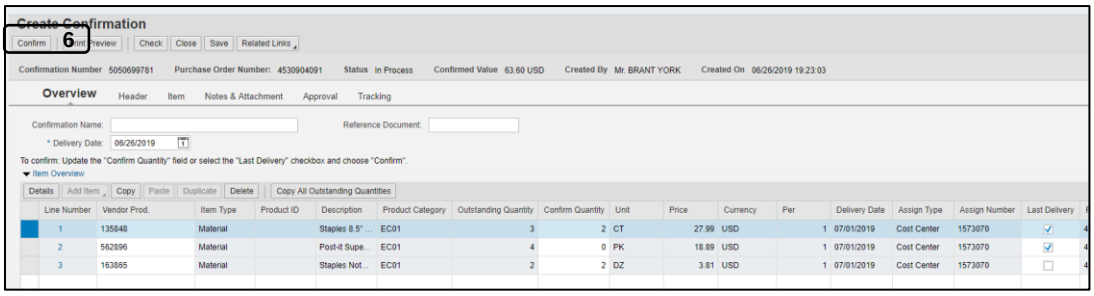


   c. If you receive less than the number of items you ordered, but you choose not to wait for future delivery, enter the number of items you actually received and select the **Last Delivery** box. This action will close the line of the purchase order.

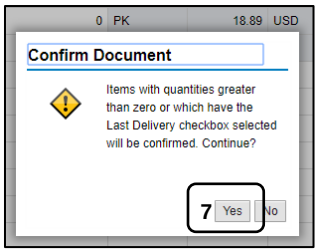


Goods Receipt and Returned Continued…

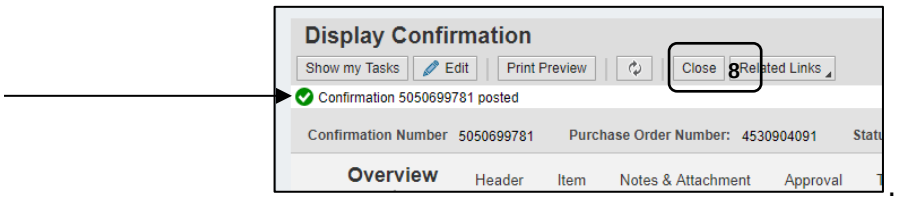
6. Once you've completed entering the confirmation quantities for all items, select **Confirm**.

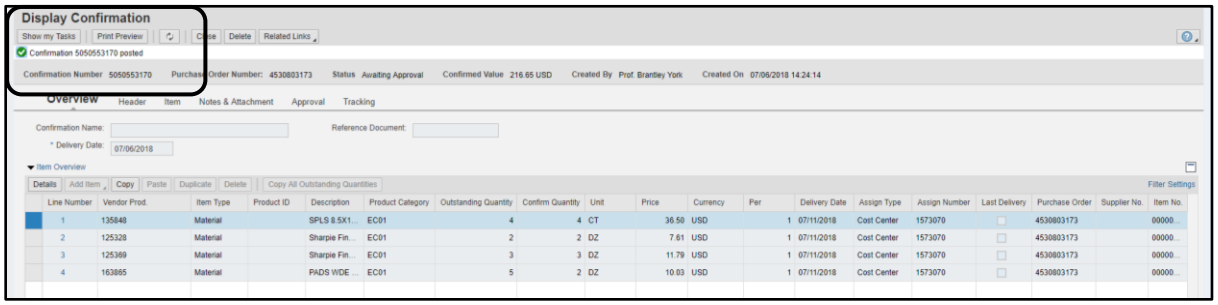


7. Review the text in the **Confirm Document** box. This action will confirm the number of items received and the items where the **Last Delivery** box was checked. Lines with a zero or less then the outstanding quantity in the **Confirm Quantity** column will be available for a future goods receipt confirmation. Select **Yes** to post the confirmation.



8. Review the confirmation message in the dialog box. Select **Close.**





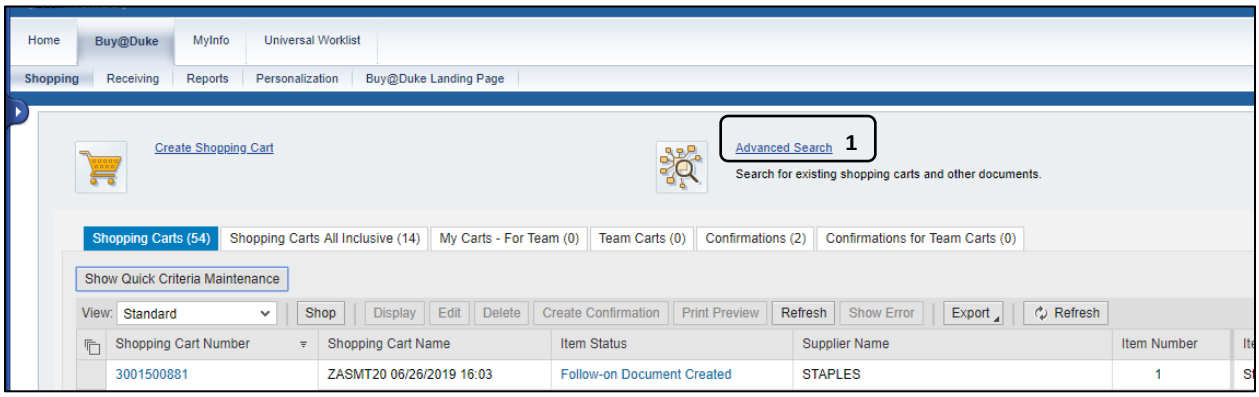
Goods Receipt and Returned Continued…

Canceling Goods Receipt Confirmation

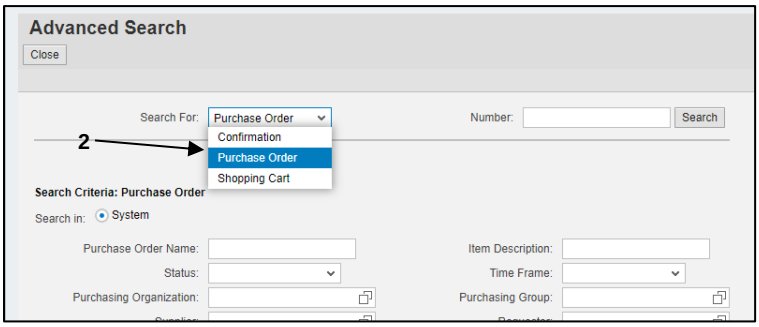
There may be rare instances when you will need to cancel a goods receipt confirmation after you have completed the confirmation. These instances include if the goods receipt confirmation was entered in error OR if the user ***accidentally*** confirmed a quantity of zero (0) by clicking the Last Delivery check box.

> ***Note:*** *An overnight job runs in Buy@Duke that creates the goods receipt confirmation record. In most instances, you will not be able to see the confirmation to cancel it until the day after the goods receipt confirmation was performed.*

1. Find the cart's Confirmation number from the main Shopping page selecting **Advanced Search**.

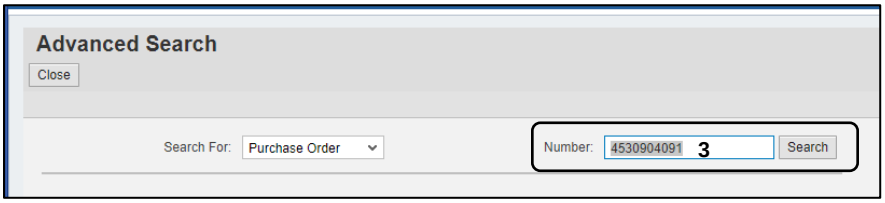


2. On the Advanced Search page, pull down the **Search For** menu and select **Purchase Order**.

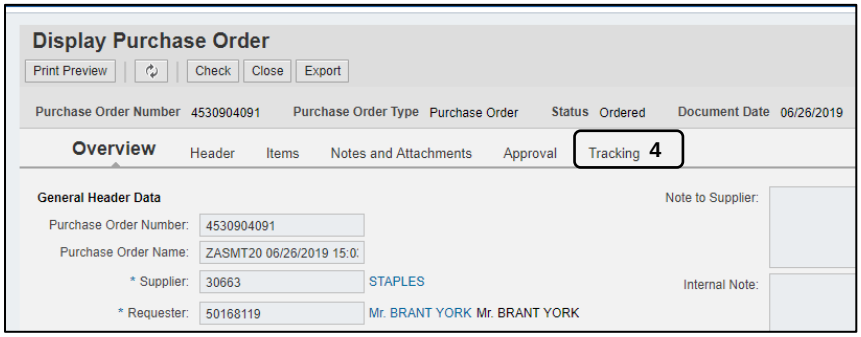


Goods Receipt and Returned Continued…

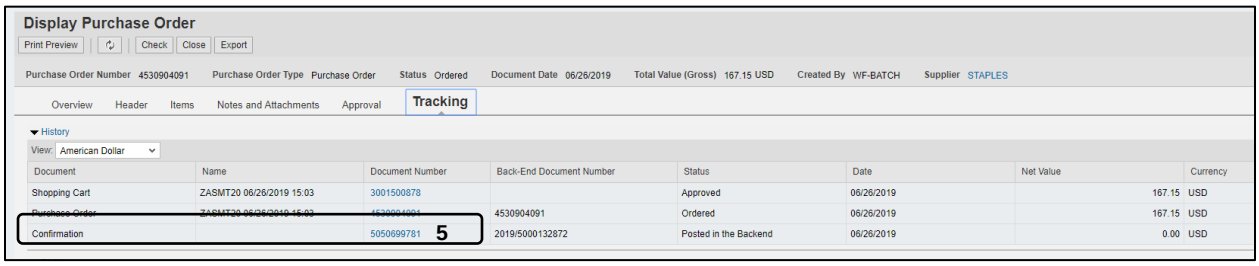
3. In the **Number** field, enter the Purchase Order number and select **Search**.



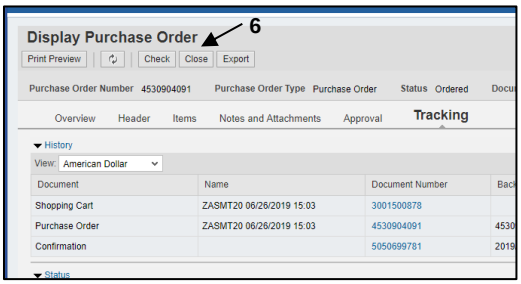
4. On the **Display Purchase Order** screen, select the **Tracking** label.



5. On the **Tracking** page, find the Confirmation number and record it.

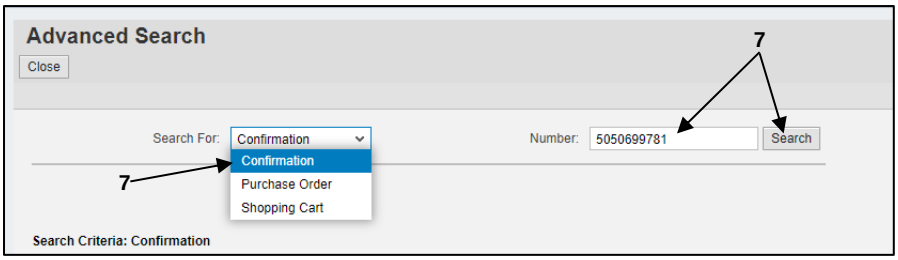


6. Close the Display Purchase Order screen, returning to the Advanced Search page.



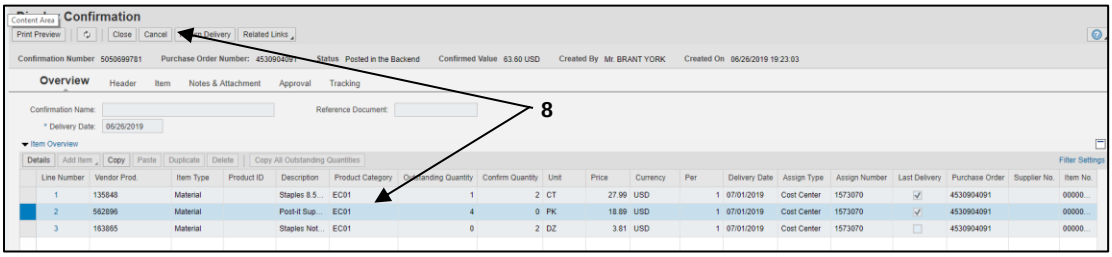
Goods Receipt and Returned Continued…

7. Back on the Advanced Search page, **Search For** the **Confirmation** and enter the confirmation in the **Number** field. Select **Search.**

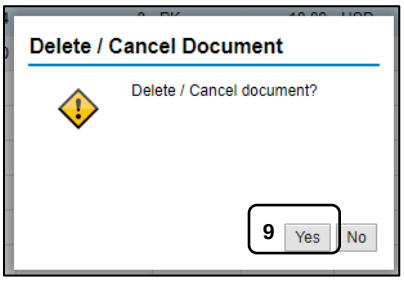


8. On the **Display Confirmation** screen, highlight the line (or lines) you wish to cancel. Select **Cancel.**

Note: *An overnight job runs in Buy@Duke that creates the goods receipt confirmation record. In most instances, you will not be able to see the confirmation to cancel it until the day after the goods receipt confirmation was performed.*

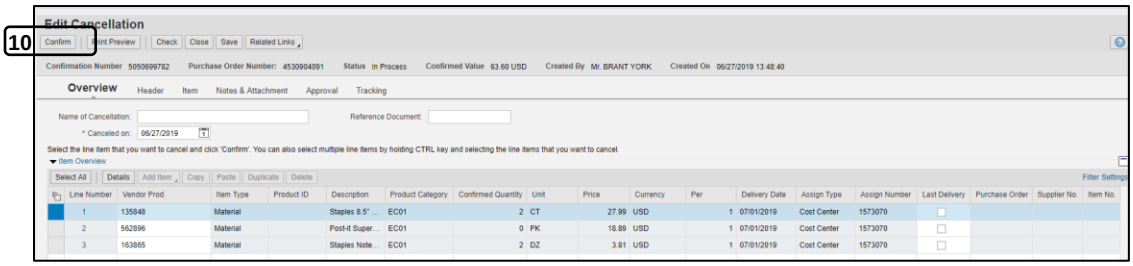


9. In the resulting dialog box, select **Yes**.

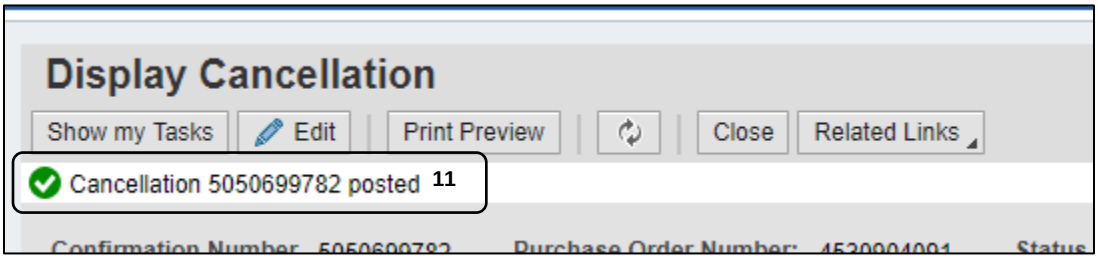


Goods Receipt and Returned Continued…

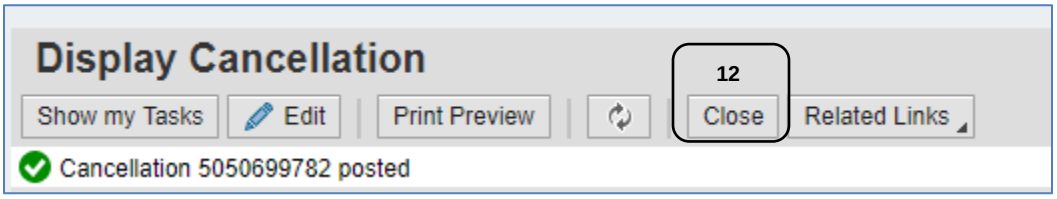
10. Notice you are now on an **Edit Cancellation** screen. Select **Confirm** to save the goods receipt cancelation.



11. Notice the **Cancellation** number in the notification window indicating the goods receipt cancelation has successfully processed.



12. Select **Close** to exit.



Note: *If you need to perform a goods receipt confirmation, you can now follow the steps for* ***Entering a Goods Receipt Confirmation*** *to perform the goods receipt confirmation.*

Goods Receipt and Returned Continued…

Goods Return

There will be times in the ordering process when you will need to return the goods you've received for various reasons, including damaged goods, poor quality of the goods, or multiple delivery of goods, among others.

In order to perform Goods Return, you must first perform Goods Receipt on the items you wish to return. This acknowledges that you did actually receive those items. To physically return the goods, you will need to follow the return process as defined by the supplier of the goods.

Note: *An overnight job runs in Buy@Duke that creates the goods receipt confirmation record. In most instances, you will not be able to see the confirmation to return items until the day after the goods receipt confirmation was performed.*

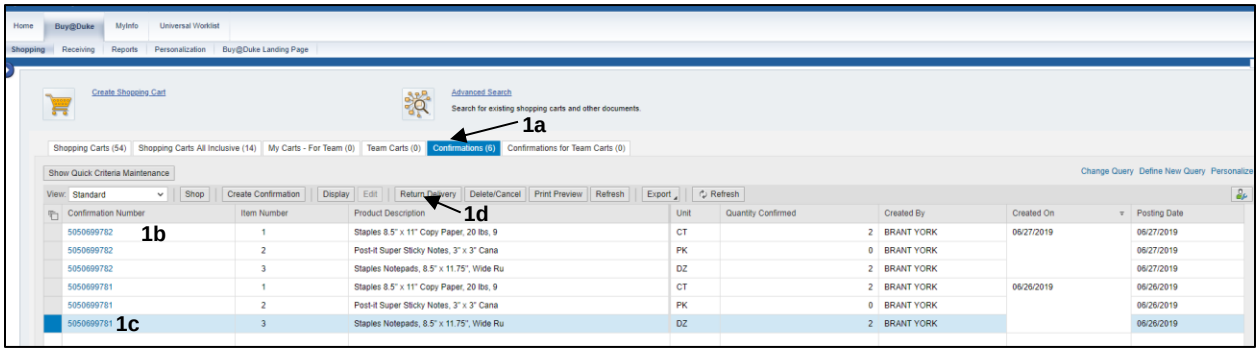
1. From the **Shopping** page,

    a. Select the **Confirmations** tab to see the list of your Purchase Order confirmations. (This may take a few moments while the list is refreshed.)

    b. Search the list for the item you wish to return.

    c. Once you have found the item, click on the button next to it. This will highlight the line item <u>as well as</u> the **Return Delivery** button.

    d. Select **Return Delivery.**



Note: *If you need to do a good return on a purchase order that you did not confirm, you will need to look-up the confirmation number. For instructions on looking up the confirmation number, reference steps 1-7 in [Canceling Goods Receipt Confirmation.]*

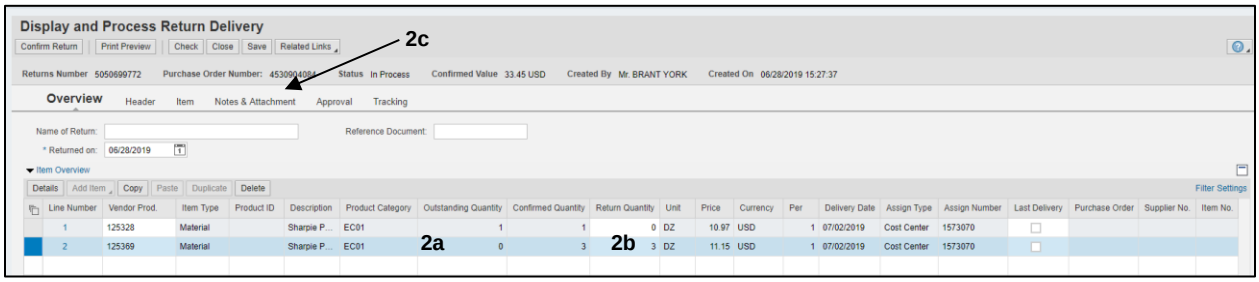
Goods Receipt and Returned Continued…

2. In the resulting **Display and Process Return Delivery** screen:

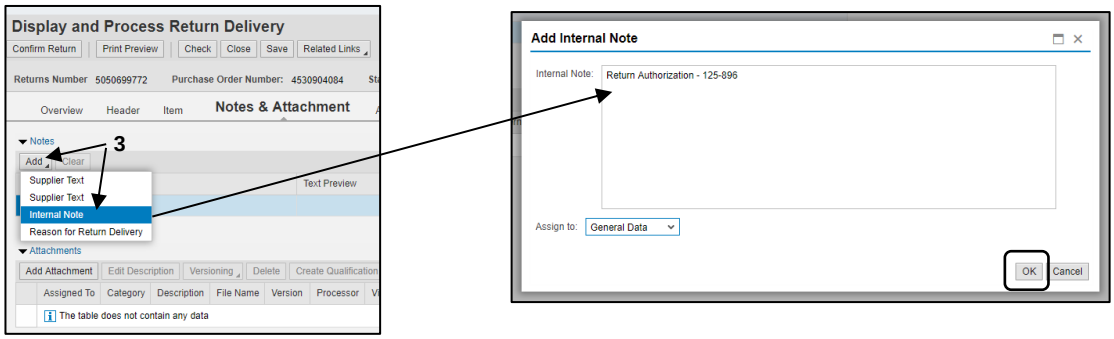
    a. Highlight the line containing the item you wish to return.

    b. Enter the quantity to be returned in the **Return Quantity** field.

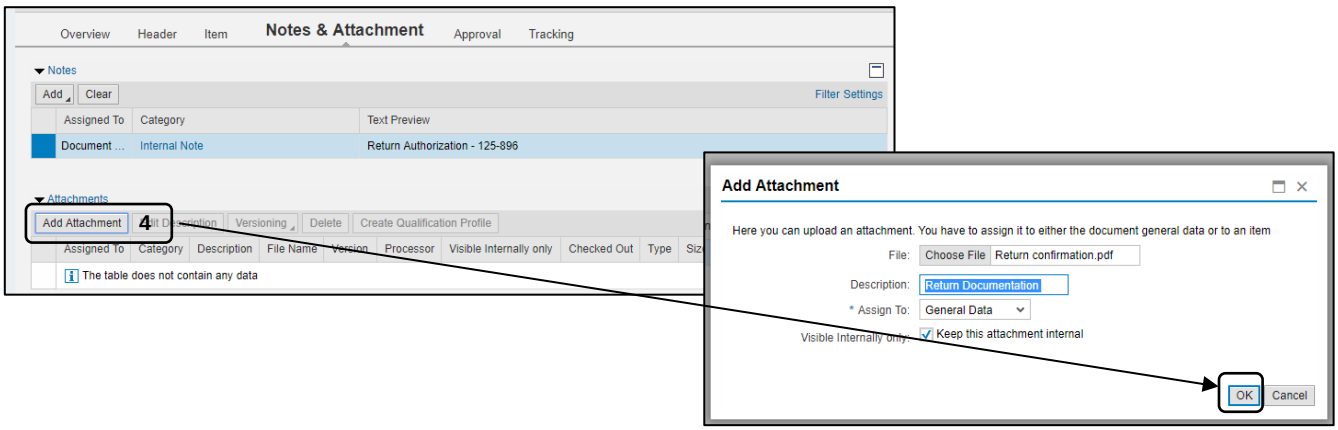
    c. Select the **Notes and Attachment** tab.



3. Under **Notes and Attachments**, select **Add** and **Internal Note.** Enter the return authorization number provided by the Supplier. Select **OK**.

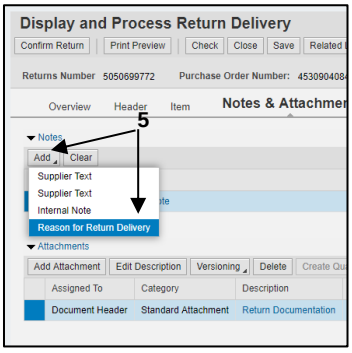


4. If provided by the Supplier, use **Add Attachments** to include documentation provided by the Supplier. Select **OK** once attachment is added.

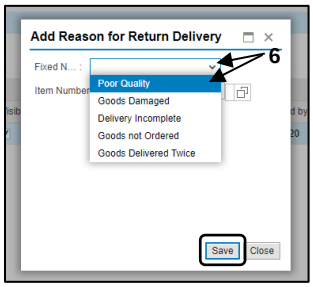


Goods Receipt and Returned Continued…

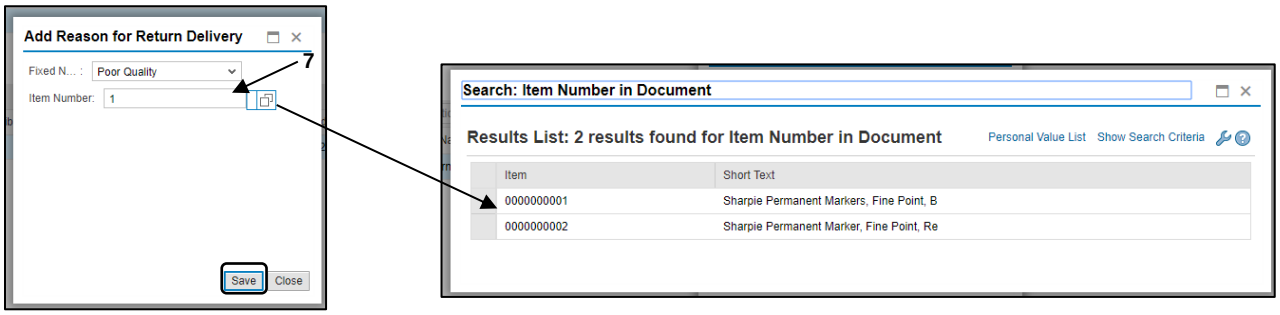
5. Next, select **Add** again. Select **Reason for Return Delivery** from the menu.



6. In the resulting window, select the **Fixed Note** list and choose the most appropriate reason for the return. Select **Save.**

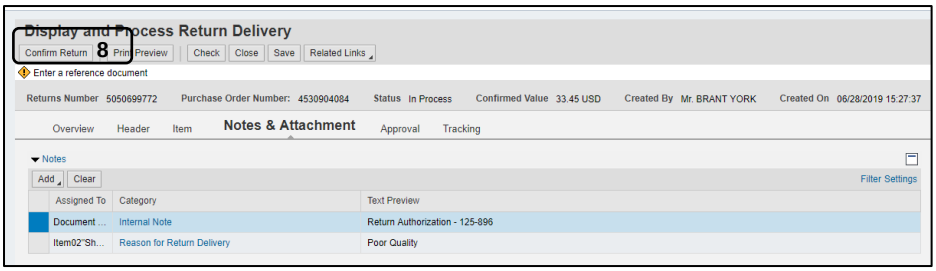


7. In the **Item Number** field, indicate the line of the item being returned. A search box is available that can be used to select the items included in the shopping cart. Select **Save** when complete.

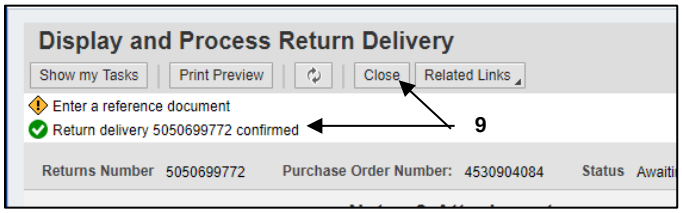


Goods Receipt and Returned Continued…

8. Returning to the **Display and Process Return Delivery** screen, select **Confirm Return**.



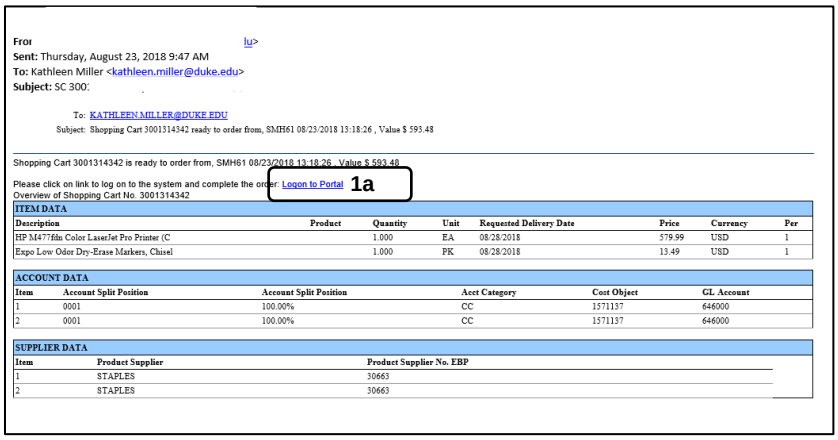
9. Review the Confirmation message and select **Close**.



Submitting Carts

In Buy@Duke, submitters are part of a team that will also include shoppers. When a shopper has created a cart that is ready for submitter review, the shopper notifies the submitter. Submitters receive a system generated email notifying them a cart is ready for their review. Once in the cart, submitters can review and make any necessary changes to the cart before submitting it into workflow for approval.

1. To begin the submission process, submitters either:
    a. Select link in the email notification received. This action opens the shopping cart in your default web browser. This is the recommended way to find the cart.



Fro lu>
Sent: Thursday, August 23, 2018 9:47 AM
To: Kathleen Miller <kathleen.miller@duke.edu>
Subject: SC 300:

To: KATHLEEN.MILLER@DUKE.EDU
Subject: Shopping Cart 3001314342 ready to order from, SMH61 08/23/2018 13:18:26 , Value $ 593.48

Shopping Cart 3001314342 is ready to order from, SMH61 08/23/2018 13:18:26 , Value $ 593.48

Please click on link to log on to the system and complete the order: Logon to Portal **1a**
Overview of Shopping Cart No. 3001314342

ITEM DATA

Description	Product	Quantity	Unit	Requested Delivery Date	Price	Currency	Per
HP M477fdn Color LaserJet Pro Printer (C		1.000	EA	08/28/2018	579.99	USD	1
Expo Low Odor Dry-Erase Markers, Chisel		1.000	PK	08/28/2018	13.49	USD	1

ACCOUNT DATA

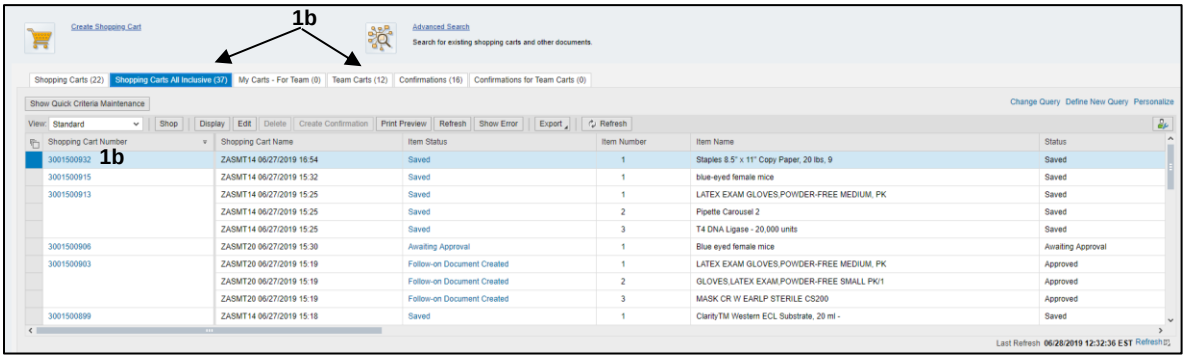
Item	Account Split Position	Account Split Position	Acct Category	Cost Object	GL Account
1	0001	100.00%	CC	1571137	646000
2	0001	100.00%	CC	1571137	646000

SUPPLIER DATA

Item	Product Supplier	Product Supplier No. EBP
1	STAPLES	30663
2	STAPLES	30663

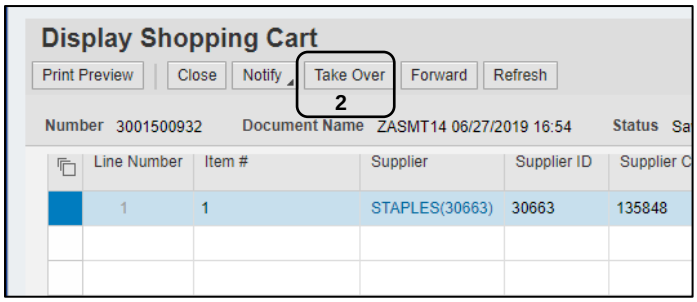
    b. Log in to Buy@Duke and go to the **Shopping** page. From that page, use the tabs to display shopping carts looking for the cart that needs to be reviewed using the tabs below. Select the **Shopping Cart Number** to open the cart. Carts that require review will display with an Item Status of **Saved.**

- **Shopping Carts All Inclusive** tab to display the carts you created and the carts created by your Team Members;
- **Team Carts** tab to display the carts that were created by your Team Members.



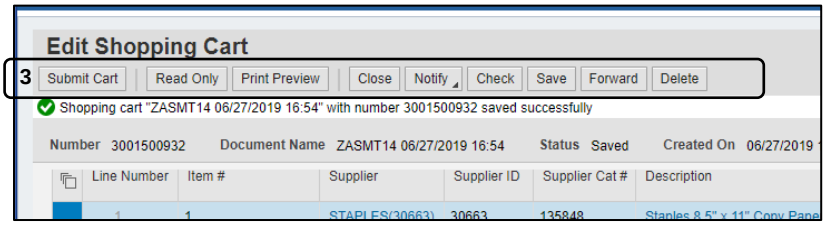
Submitting Carts Continued…

2. Once you've opened the detailed view, notice the action buttons available. To gain access to the cart, select **Take Over.**



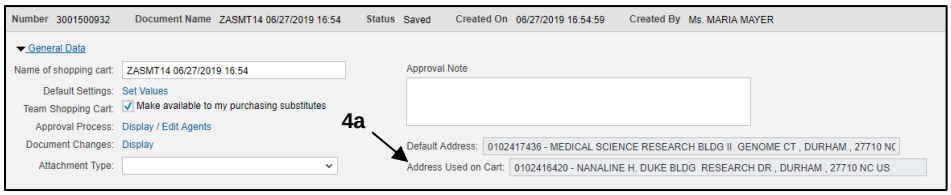
Note: *If you receive an email notifying you that a cart is ready to be submitted, but **Take Over** is not displayed when you open the cart, another submitter on your team has already submitted the cart.*

3. Now that you have taken over the cart, the action buttons change. Notice that Submit Cart now appears. At this point, you have complete access to review the cart making any necessary changes.



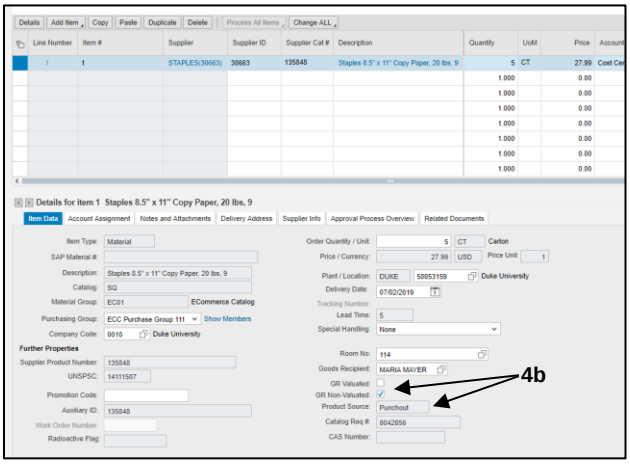
Submitting Carts Continued…

4. Before submitting the cart, submitters should review the following:
   a. Review the address used on the cart to confirm the correct delivery location.



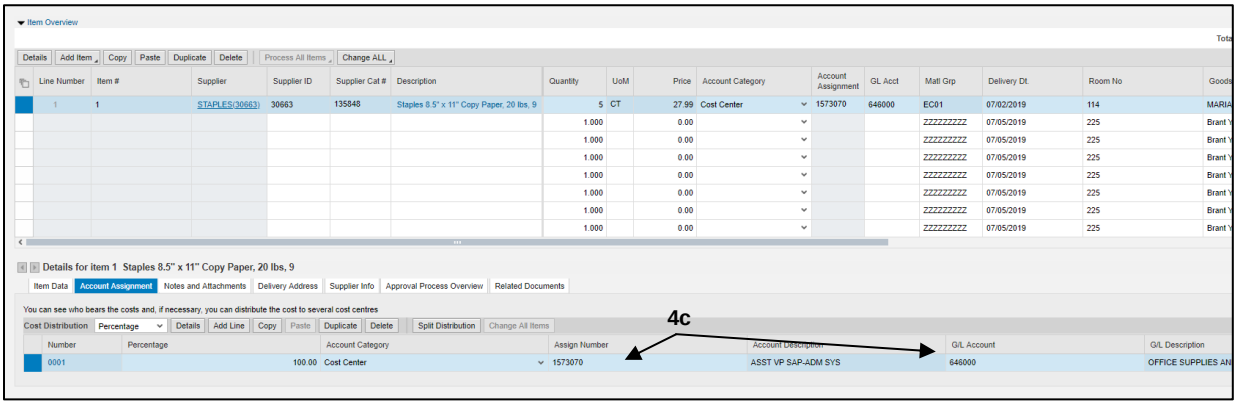
   b. Use the **Details** section for each item of the cart. Under **Item Data,** review information about the item. The product source will indicate if the item is from a Duke Marketplace Catalog or created via a Text order. If goods receipt is required, ensure the **GR Non-Valuated** box is checked.

Note: *If the GR Valuated box is checked, remove the check and select the GR non-valuated as that is likely an error. If you have questions, contact your business office before submitting the cart.*



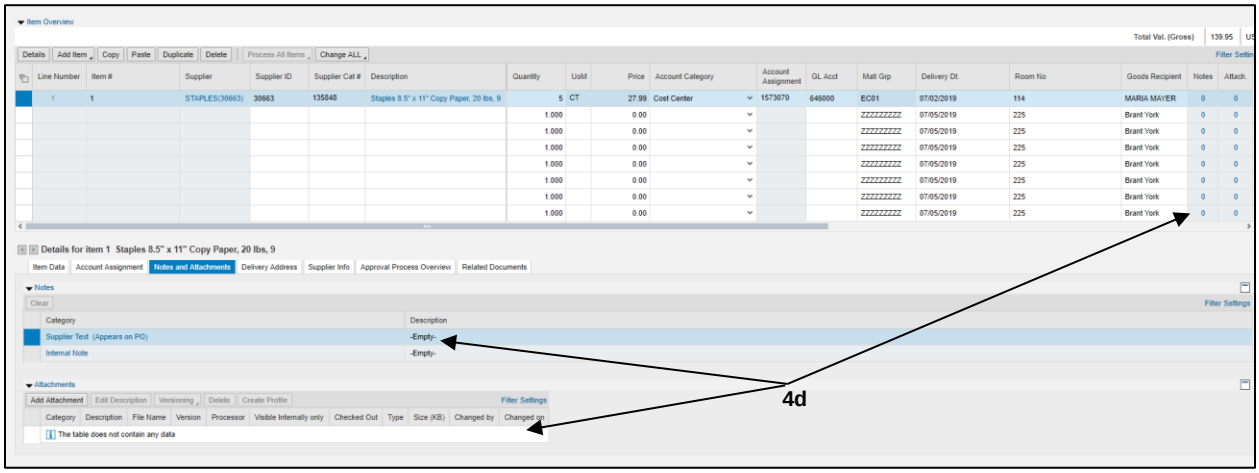
Submitting Carts Continued…

c. Review the **Account Assignment** for each line. Verify accuracy of cost object (s) and GL account(s). If WBS elements are used, ensure the purchase is allowable, allocable, and reasonable for the project. Make changes as necessary as outlined in the Shopping and Functions to Refine Carts section of this guide.



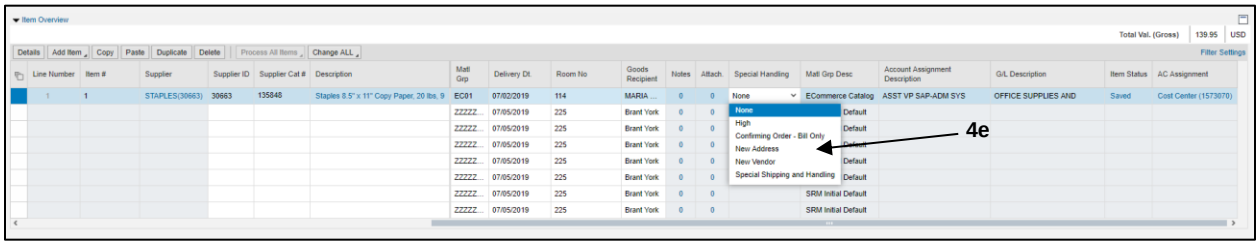
Note: *This is an important step, as one of the Submitter's primary responsibilities is assigning or verifying the correct fund information. For carts supporting Sponsored Research, it is the Submitter's responsibility to asses and validate allocability, allowability, and reasonableness.*

d. Select **Notes and Attachments** and review any documents that may be attached. As a general rule, any cart created for non-catalog/text orders should have attachments. At minimum, a quote supporting the pricing should be attached.

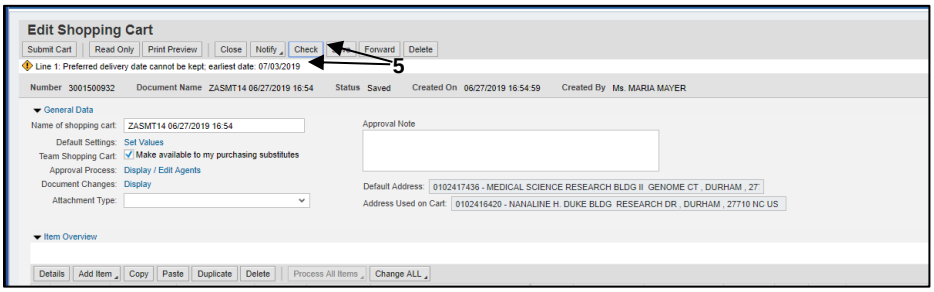


Submitting Carts Continued…

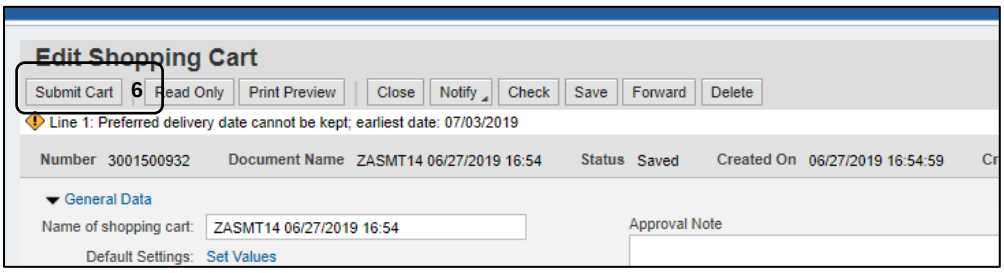
e. Scroll to the left and notice if the **Special Handling** applies to the cart. If so, ensure the appropriate information is included with the cart.
   - **Confirming Order – Bill Only –** invoice should be attached.
   - **New Address –** a W-9 completed by the supplier should be attached.
   - **New Vendor –** vendor registration packet should be attached.
   - **Special Shipping and Handling –** notes should be provided to the supplier describing what is needed.



5. Once you complete your review of the cart and make any necessary changes, select **Check** to generate error and warning messages as part of the validation process.

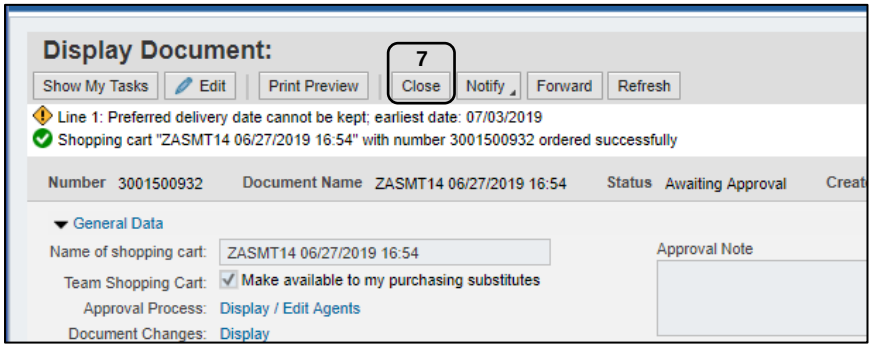


6. Select **Submit Cart.** Based on the submitter's purchasing threshold and the goods/services being purchased, the cart will either have a purchase order issued automatically or will move into workflow for approval.



Submitting Carts Continued…

7. Review the confirmation message and select **Close.**

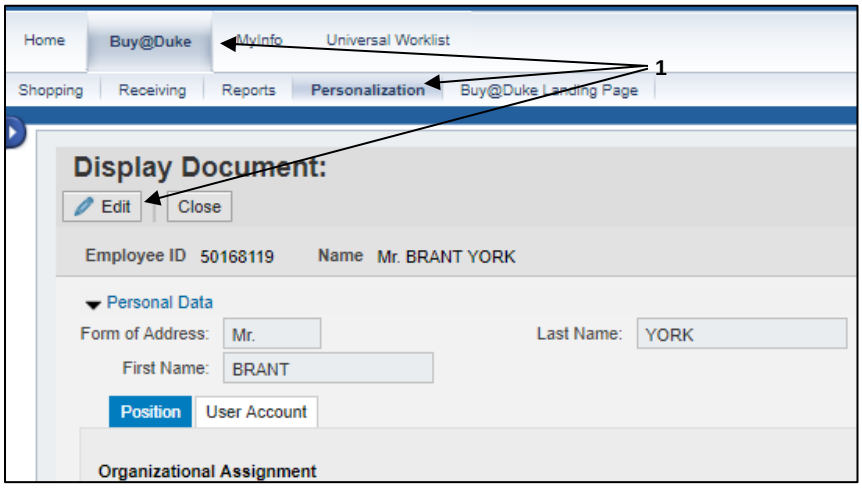


Frequently Asked Questions – Quick Reference Steps

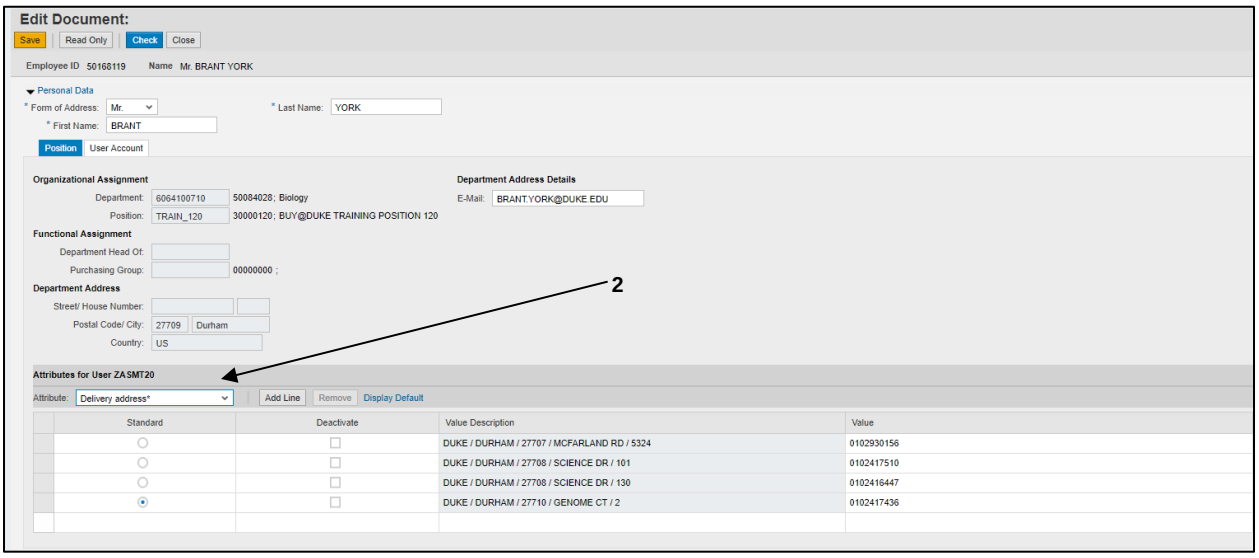
How Do I Set or Edit a Delivery Address?

The delivery address is comprised of three pieces of data – the physical address of the building, the room number/location within the building, and information on the person receiving the goods/services.

1. From the **Buy@Duke tab,** select the **Personalization** page, and **Edit.**



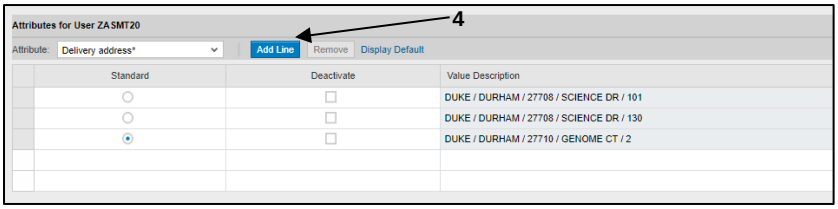
2. Once the page is open for editing, in **Attributes,** select **Delivery Address.** If deliver addresses have been sent, they will display. If no delivery addresses have been set-up, the table will be blank.



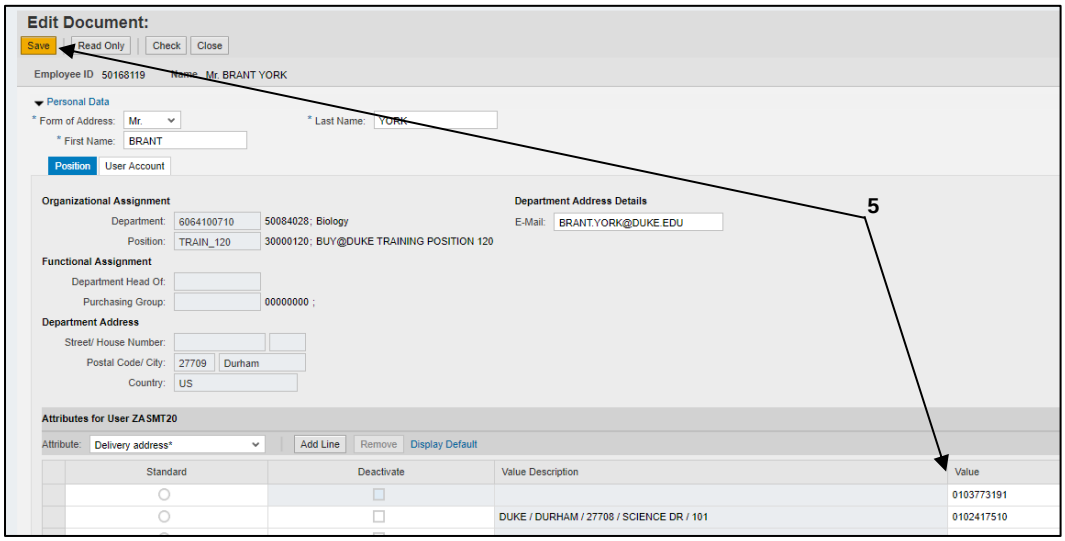
Frequently Asked Questions Continued…

3. If a delivery address needs to be removed, highlight the link and select **Remove** to delete the line.

4. To add a new address, select **Add Line.**



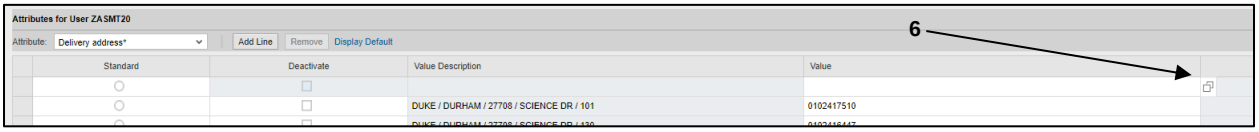
5. If you know the Buy@Duke delivery address value for your location, type the number in the **Value** column. Select **Check** when complete. The **Value Description** field will populate with the number when you select enter. It will populate with text once you select **Check** or once you **Save.**



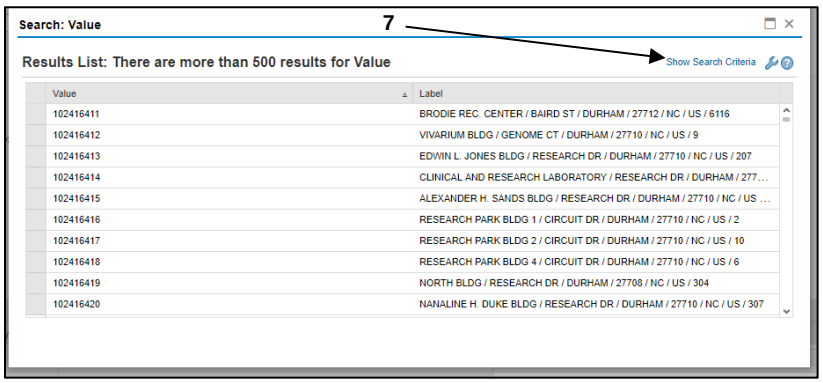
Note: *If you select **Save**, remember to click Edit again to return to the Edit Document mode.*

Frequently Asked Questions Continued…

6. If you do not know the Buy@Duke delivery address value, a search is available. In the new line, select the search box on the far right of the **Value** field.



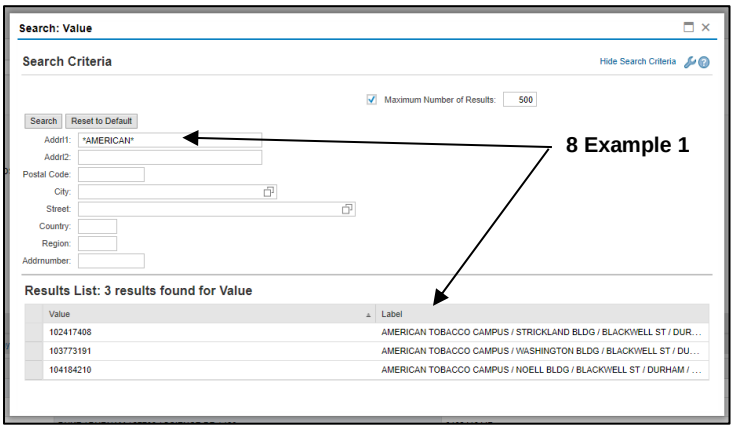
7. In the resulting **Search: Value** screen, select **Show Search Criteria.**



Frequently Asked Questions Continued…

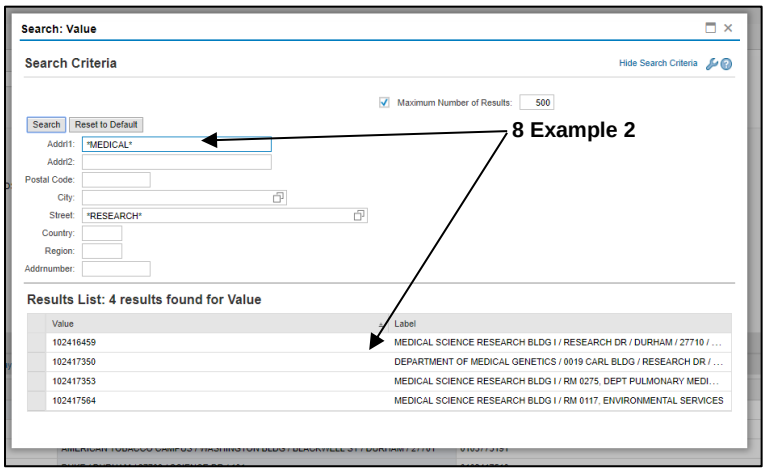
8. In the resulting search screen, enter criteria to search for your delivery address. A few points to remember:
    a. Always use all caps when searching.
    b. Do not use an acronym. For example: MSRB 1, ATC, LSRC – will not return results. You must use part of their actually name.
    c. Surrounding your search term by asterisks will allow for an open search and does not require an exact match. If you do not use asterisks, you will need to know the entire name of your building exactly how it was set up in Buy@Duke.
    d. Use the Address 1 field for your building name and/or the Street Name as the foundation for your search. Always start with the Address 1 field and add in the street if necessary to narrow down your results.

Example 1: Looking for ATC – American Tobacco address on Blackwell Street. Three locations return. I would select the line with the building that was applicable to my location.

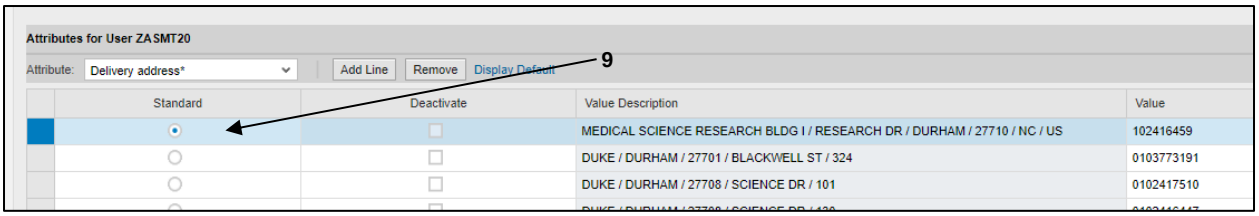


Frequently Asked Questions Continued…

Example 2: Looking for MSRB1 – Medical Sciences Research Building on Research Drive. I would enter the street because the search term *MEDICAL* returns 60 plus results without a street. Again I would select the building applicable to my location.

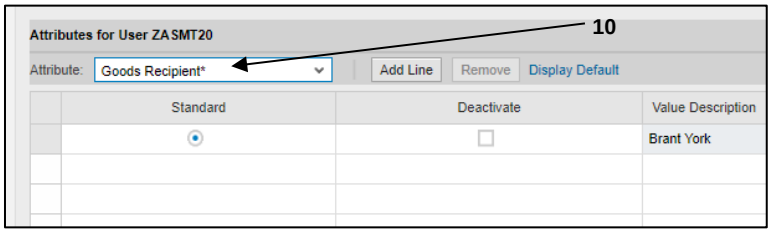


9. The new locations are added to your list. Select the radio button in the **Standard** column to set an address as your default.



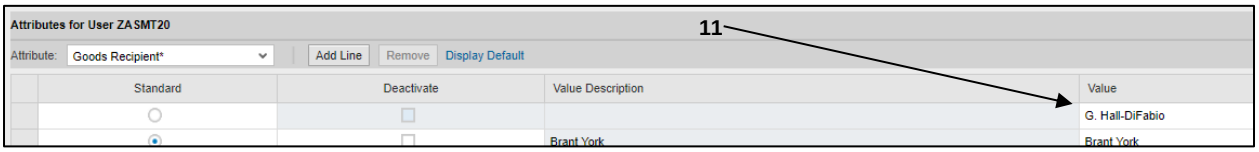
Note: *Do not select Deactivate as this will cause technical issues. If you select an address in error, highlight the line and select* ***Remove****.*

10. To set the goods recipient, select **Goods Recipient** from the **Attributes** dropdown menu.

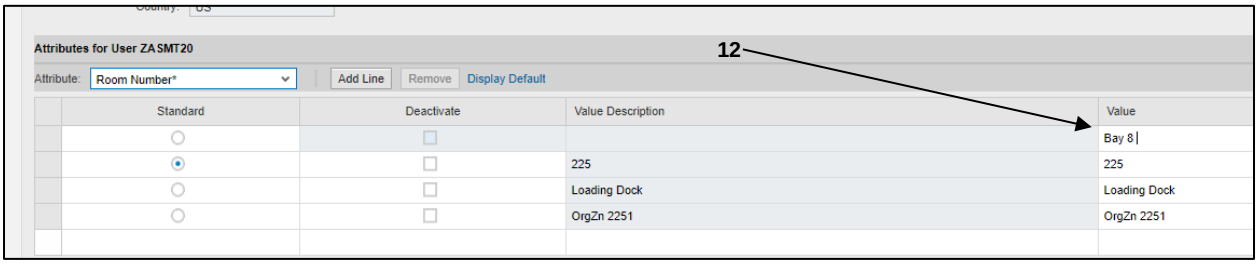


Frequently Asked Questions Continued…

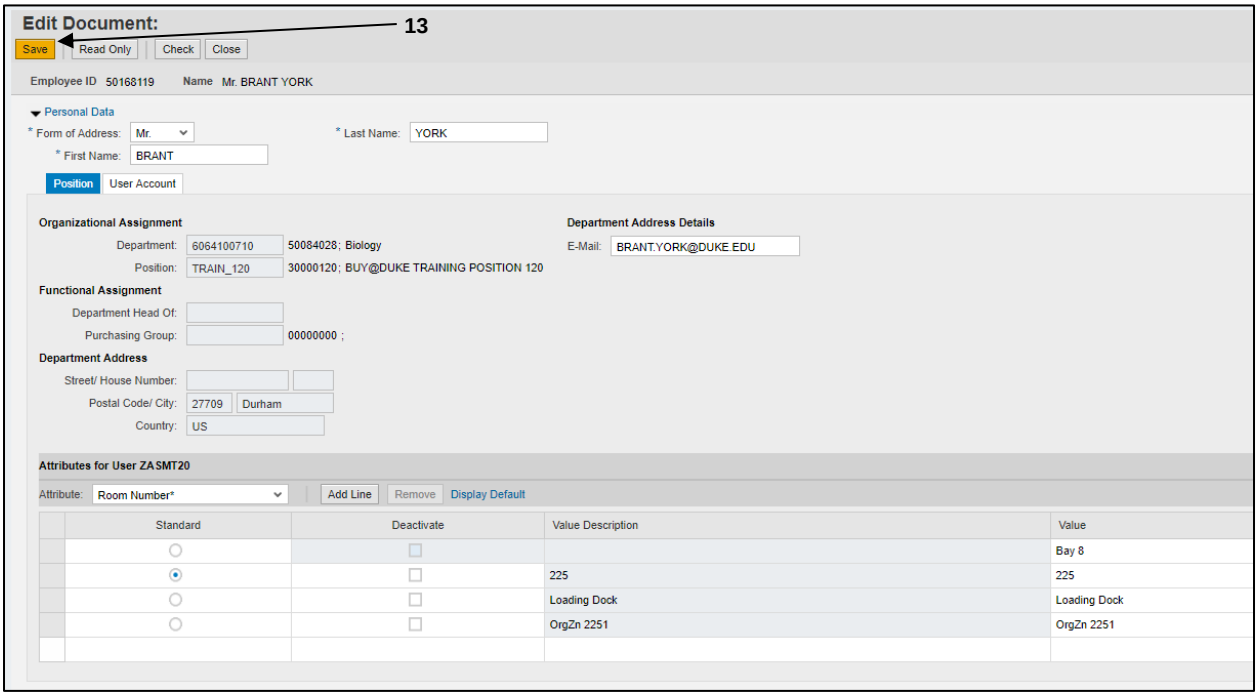
11. Select **Add Line** and type in the name of the goods recipient in the **Value** column. You are limited to 12 characters in the name so abbreviate as necessary.



12. Select **Room Number** from the **Attribute** dropdown. Select **Add Line.** Type in the room number/location in the building where items should be delivered. You are limited to 25 characters, so be thoughtful about how to describe your location.



13. Once all information is added, select **Save.**

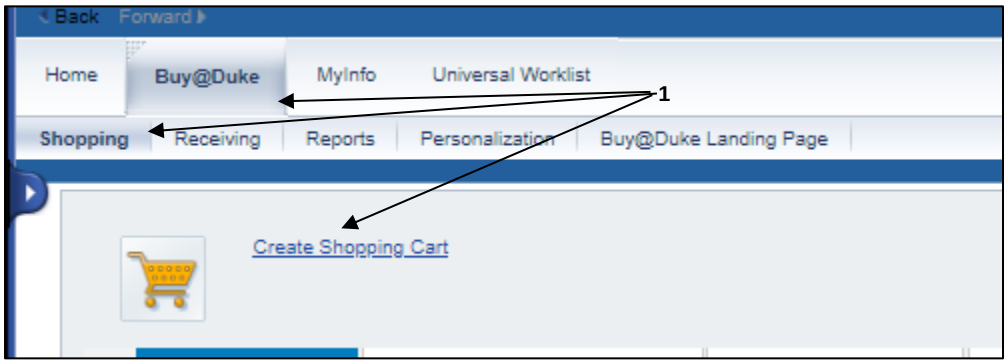


Frequently Asked Questions Continued…

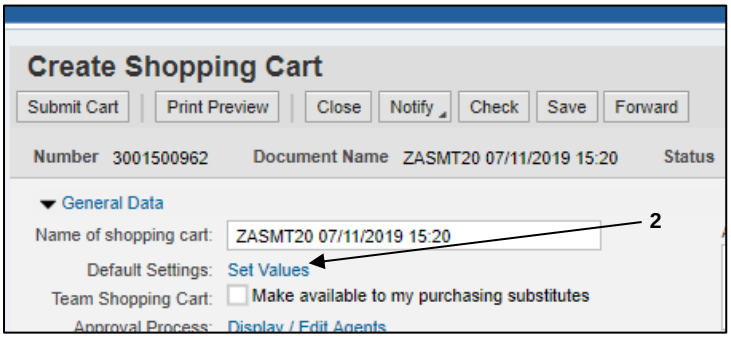
How Do I Create or Edit My Personal Value List (PVL) for the Delivery Address?

If you create purchase orders for multiple delivery addresses, it is helpful to create a PVL for delivery addresses.

1. To create/edit the PVL for delivery address, select **Create Shopping Cart** from the **Buy@Duke Shopping** page.

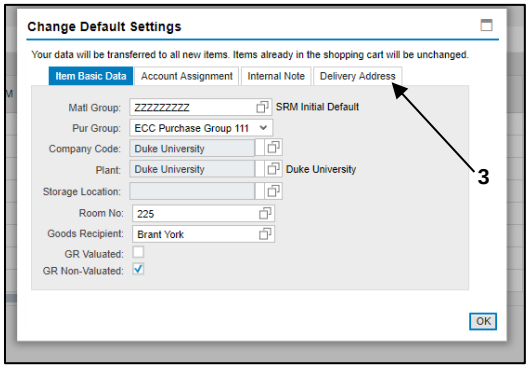


2. Once in the cart, select **Set Values.** It is important to change the delivery address of the cart before adding items to the cart.

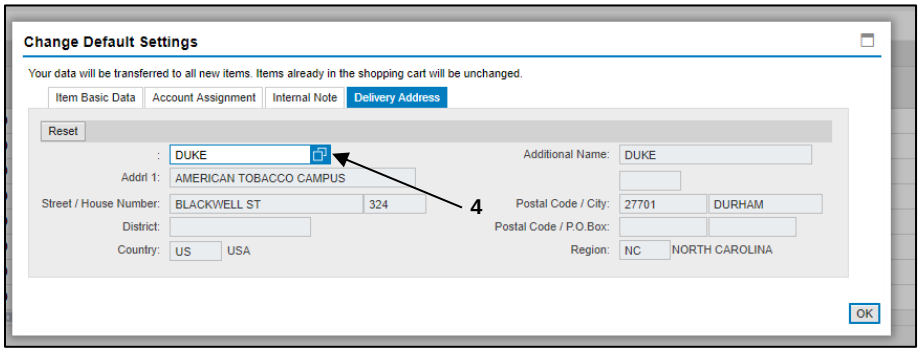


Frequently Asked Questions Continued…

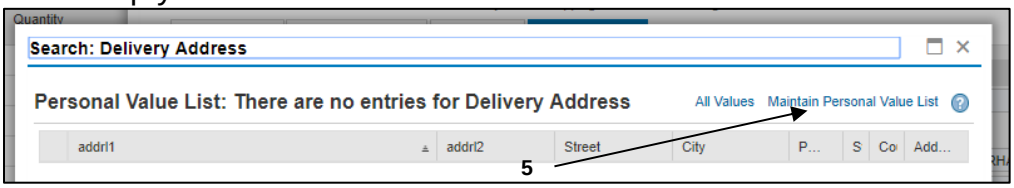
3. From **Change Default Values,** select **Delivery Address.** Based on your screen display, you may need to select the arrow on the right side of the screen for the tab to display.



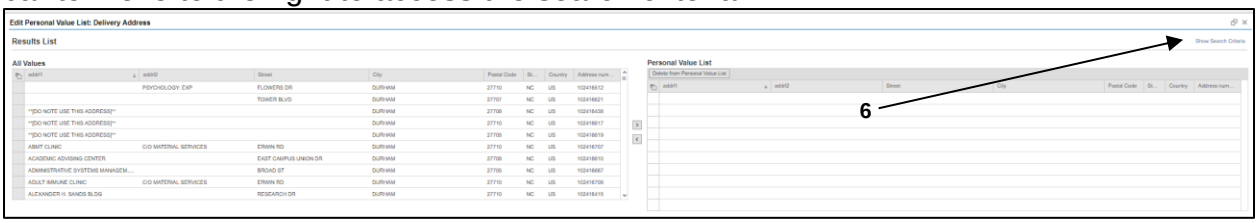
4. The default address set in personalizations will display. Select the search both to open the PVL.



5. From **Search: Delivery Address,** select **Maintain Personal Value List.** Notice the PVL is empty.

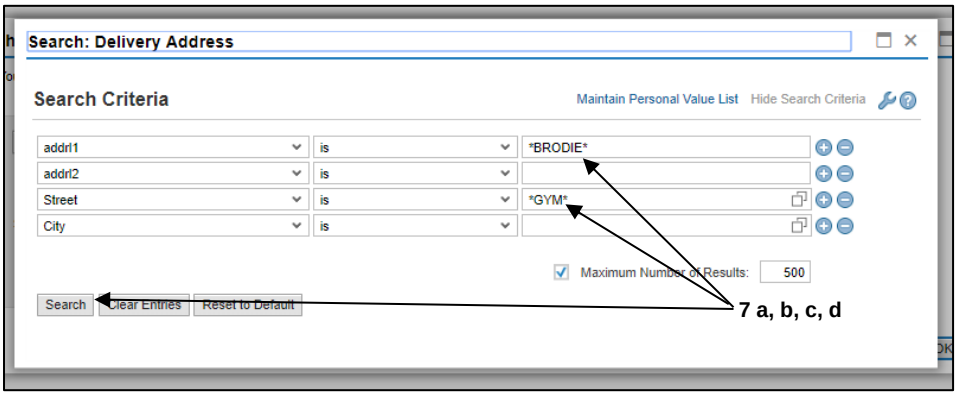


6. From **Edit Personal Value List: Delivery Address,** select **Show Search Criteria.** Depending on screen displays, you may need to use the bottom scroll bar to move to the right to access the search criteria.

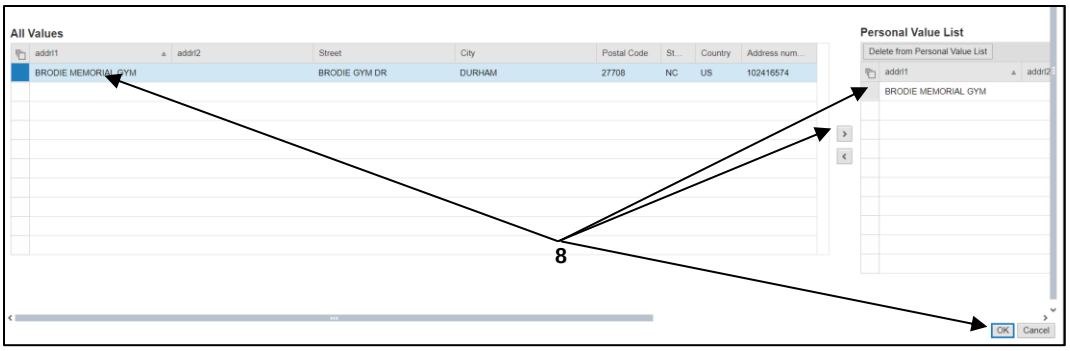


Frequently Asked Questions Continued…

7. In the **Search Criteria** screen, search for the delivery address. Select **Search** when complete. Keep in mind the following:
    a. Always use all caps when searching.
    b. Do not use an acronym. For example: MSRB 1, ATC, LSRC – will not return results. You must use part of their actually name.
    c. Surrounding your search term by asterisks will allow for an open search and does not require an exact match. If you do not use asterisks, you will need to know the entire name of your building exactly how it was set up in Buy@Duke.
    d. Use the Address 1 field for your building same and/or the Street Name as the foundation for your search. Always start with the Address 1 field and add in the street if necessary to narrow down your results.

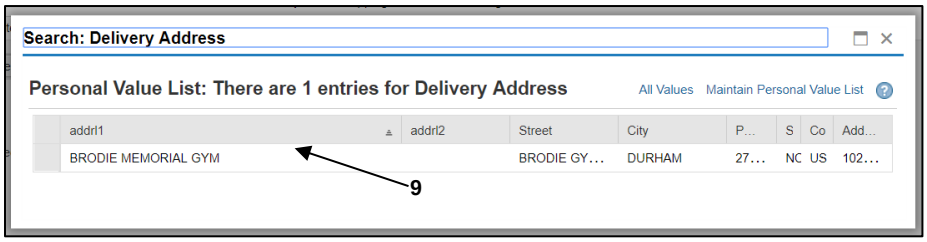


8. Highlight the desired delivery address in **All Values** and use the arrows to move it to **Personal Value List.** Select **OK** once moved.



Frequently Asked Questions Continued…

9. The address now display in the **PVL** in **Search: Delivery Address.**

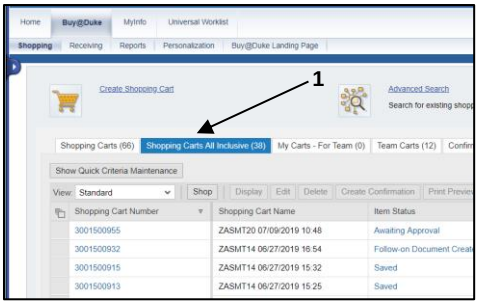


Frequently Asked Questions Continued…

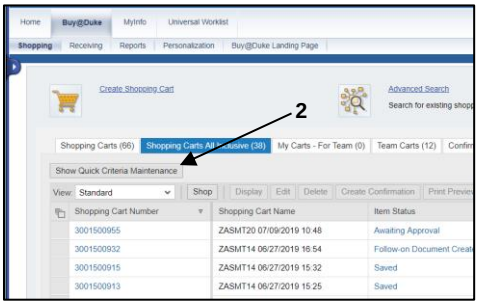
What is the Best Way to Use the Shopping Carts All Inclusive Tab?

The Shopping Cart All Inclusive tab is the best way to search for cart activity.

1. On the Shopping page, highlight the **Shopping Carts All Inclusive** tab.



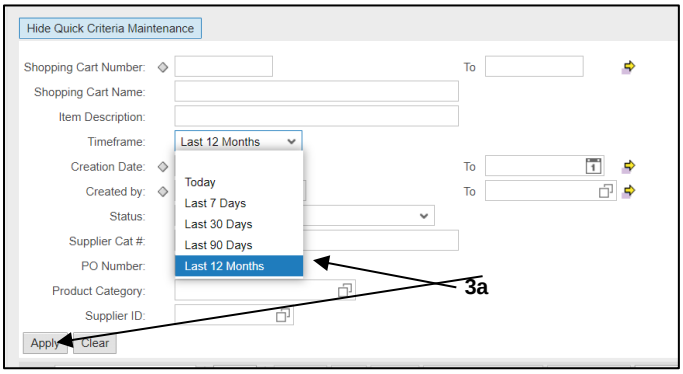
2. To search, select **Show Quick Criteria Maintenance.**



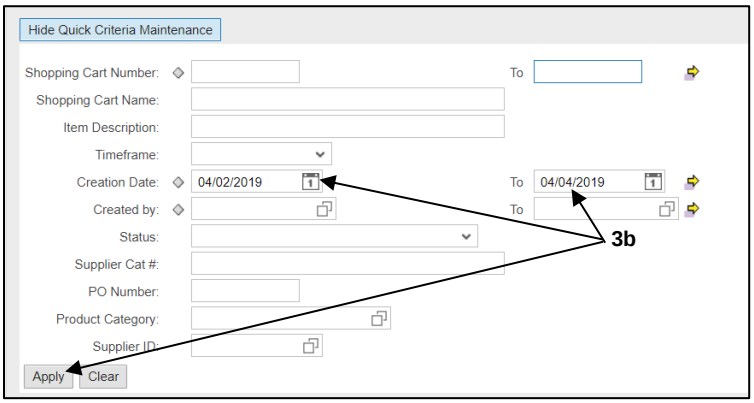
Frequently Asked Questions Continued…

3. Notice the variety of criteria that can be used to search for a cart. When each search criteria is used, select **Apply** to pull back information based on your search criteria. Some of the most helpful searches include:

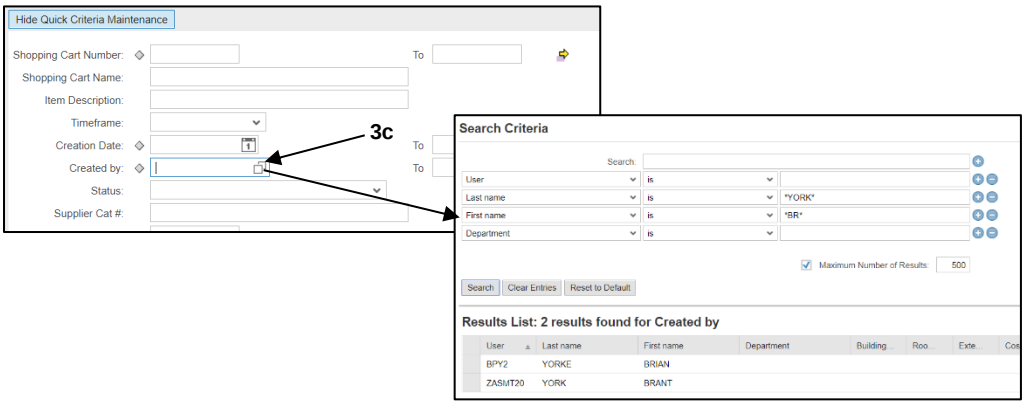
   a. Search by a timeframe. Notice the dropdown menu allows you to narrow or broaden the timeframe. The default displays carts for the past 30 days.



   b. Create a custom date range by entering in a range for **Creation Date.**

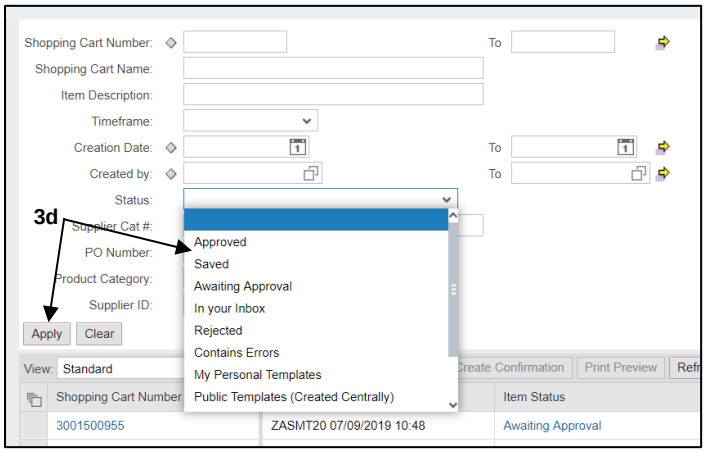


   c. This display includes carts created by all team members. To search for carts created by specific team members, enter the Net ID in Created by or search on name.



Frequently Asked Questions Continued…

d. Search based upon a particular status – for example approved carts or saved carts – using the **Status** dropdown.

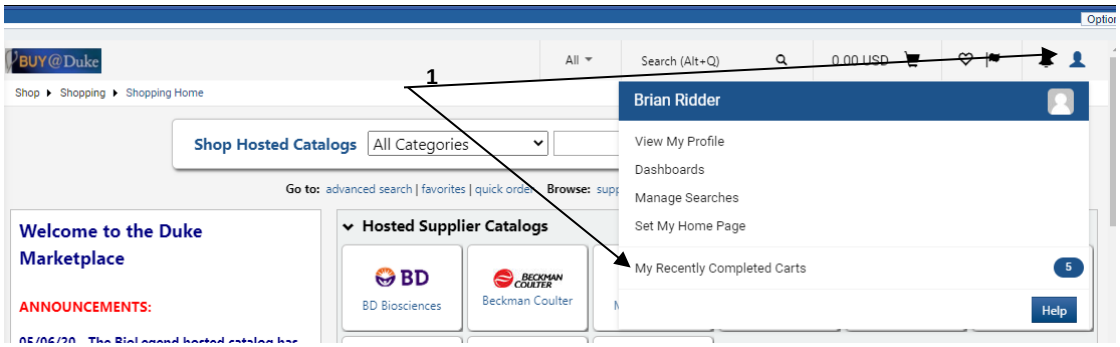


Frequently Asked Questions Continued…

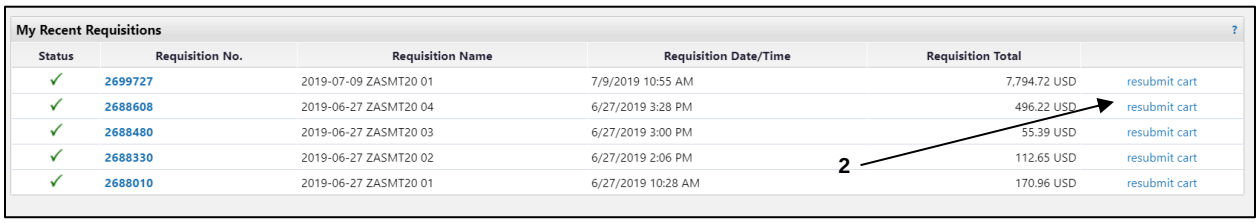
What Do I Do if My Cart Did Not Return from the Buy@Duke Marketplace?

Occasionally due to network connectivity issues, a cart created using a vendor catalog in the Marketplace, is not successfully returned into Buy@Duke. In this instance, you will need to retrieve and resubmit the cart.

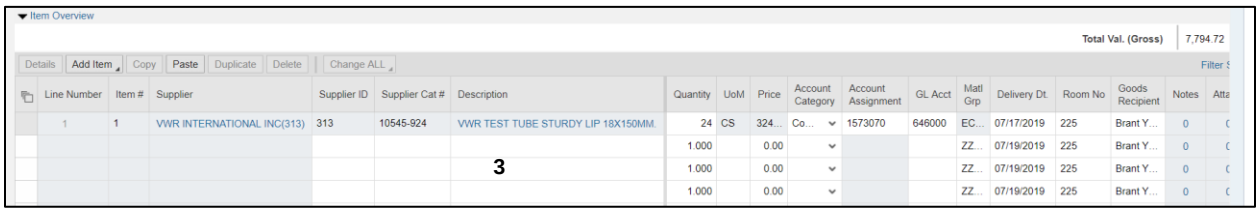
1. From the Marketplace home page, select the dropdown menu accessed by the profile icon and select **My Recently Completed Carts.**



2. From your **My Recent Requisitions** list, select **Resubmit Cart.**



3. Using **Resubmit Cart** pulls the requisition back into the Buy@Duke cart and you can continue working.

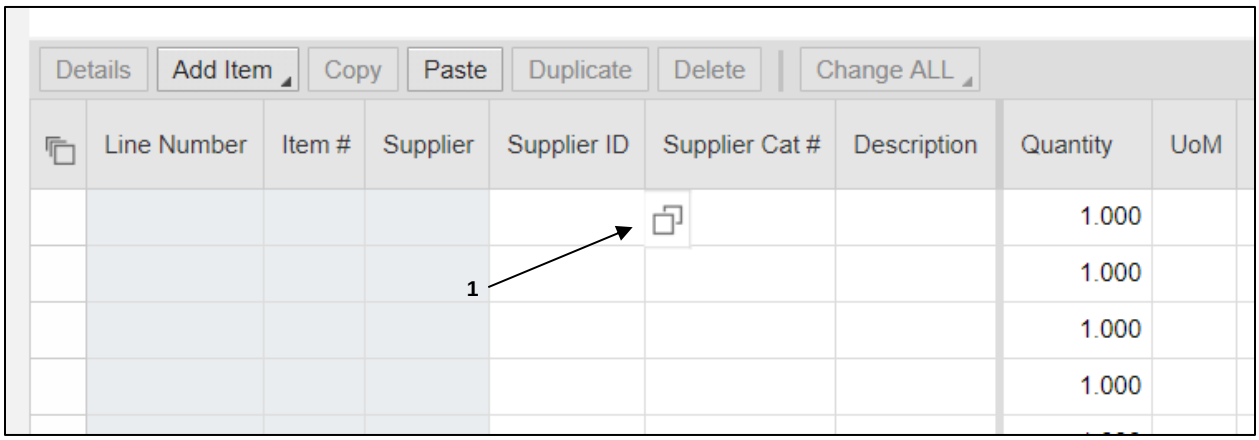


Frequently Asked Questions Continued…

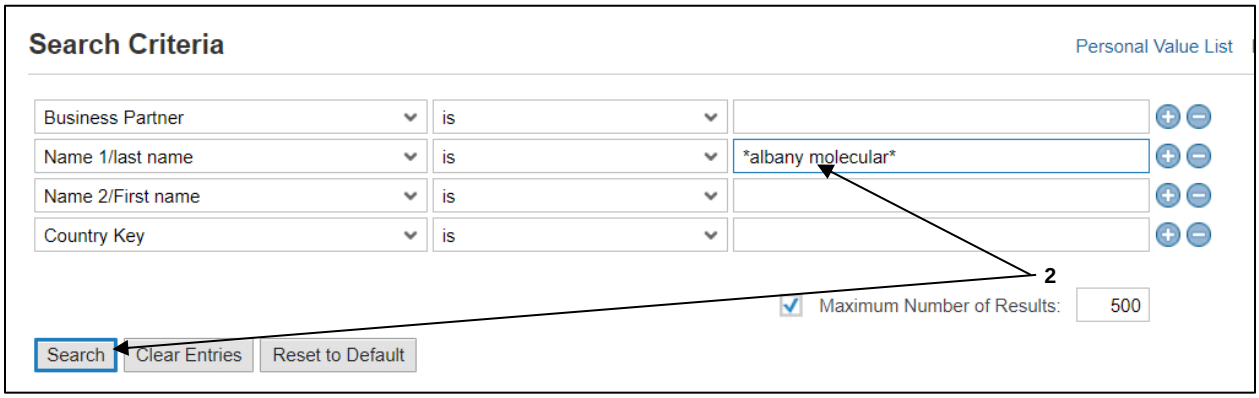
How Do I Look Up a Vendor and Add That Vendor to My Personal Value List When Creating a Text Order?

Creating a personal value list (PVL) of vendors who are frequently used but not in the Duke Marketplace is a great way to increase efficiency when working in Buy@Duke. If your vendor search returns multiple vendors, please contact Procurement at 919-681-1872 if you are unsure of which vendor to select.

1. From a Buy@Duke shopping cart, select the search box in the **Supplier ID** field to look-up a vendor. You can also enter the vendor number.

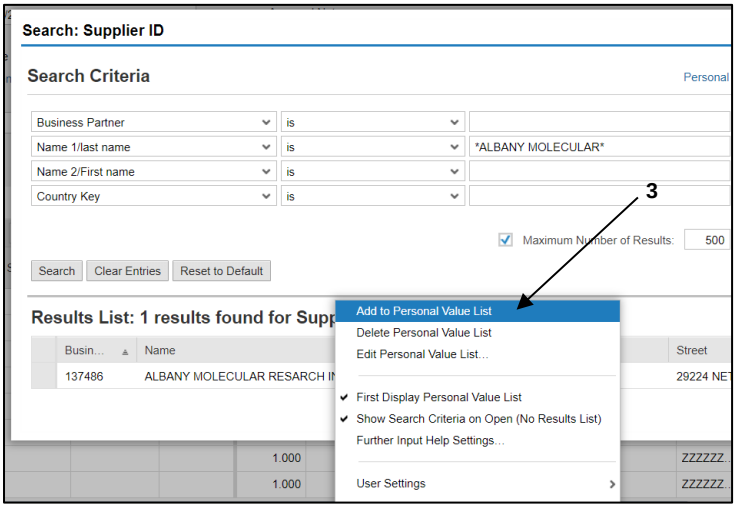


2. In the **Supplier ID Search,** enter the vendor name in **Name 1**. Use asterisks as a wildcard search. If the vendor does not display, use the same search in **Name 2** as this field is used if a vendor has a DBA – Doing Business As – name. Select **Search** once information is entered.

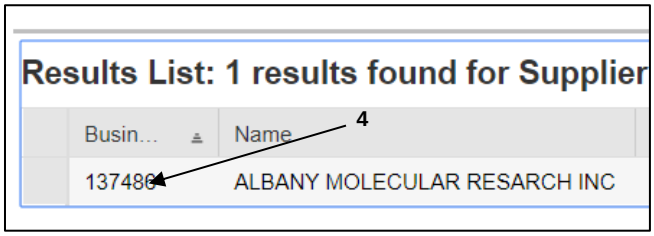


Frequently Asked Questions Continued…

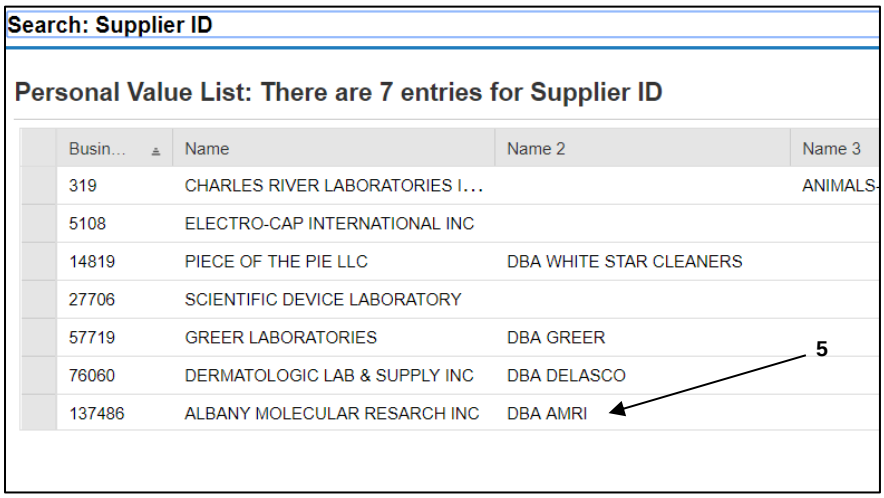
3. In the Results List, hover over the Supplier ID and right click the mouse to open a menu. From the menu, select Add to Personal Value List.



4. Double click the supplier number to return to the cart.



5. Select the search box in **Supplier ID** and you will now see the supplier added to your PVL.

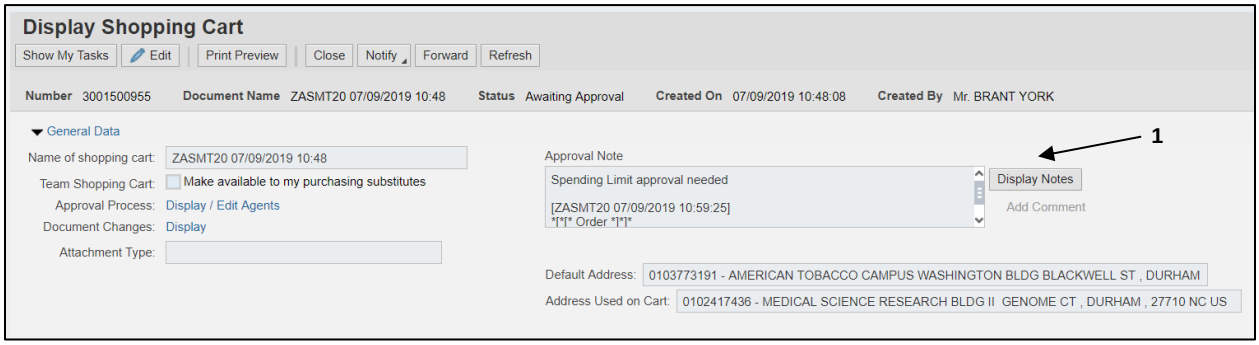


Frequently Asked Questions Continued…

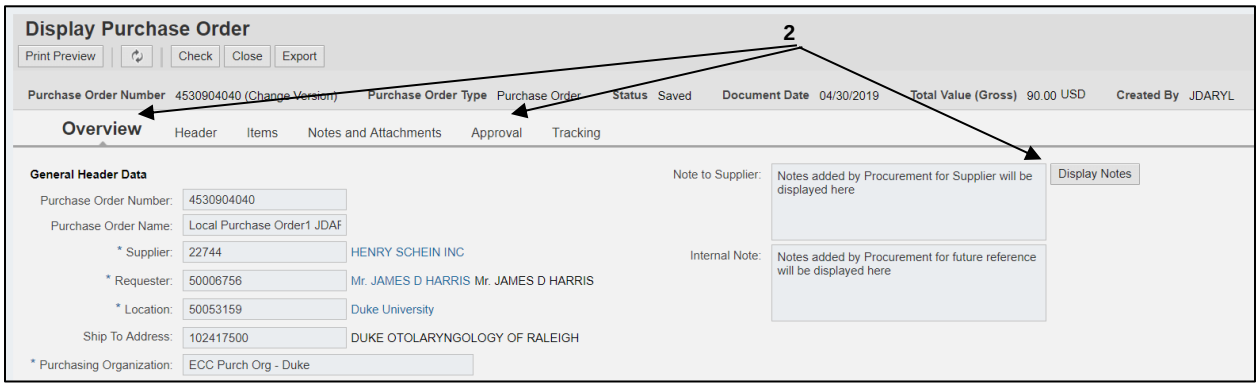
How Do I See Notes Associated With a Shopping Cart?

When notes are added to a shopping cart, users have the ability to display all notes associated with the shopping cart in one PDF both during the approval process and once a cart becomes a purchase order. Notes displayed on the PDF include approval notes, item notes, and supplier text.

1. To access the notes PDF, display the shopping cart and select **Display Notes**.



2. To access the notes PDF from the purchase order, open the purchase order and select **Display Notes** either from the **Overview** or the **Approval** pages.



Frequently Asked Questions Continued…

3. From **Display Notes**, the PDF combines a wide variety of information.

Purchase Order : 4530904040
Created By: JAMES HARRIS at 04/30/2019
PDF Generated on 04/30/2019 @ 09:58:57

Supplier Text :

Notes added by Procurement for Supplier will be displayed here

Approval Note :

*** END APPROVALS ***
[JDARYL 04/30/2019 09:38:52]
UWL Approval Notes added to cart will be displayed
(JDARYL 04/30/2019 09:38:43 EST)

_____
ITEM 1 - ProcSvc (SpecNd) approval needed
[ZASMT18 04/30/2019 09:36:43]
[[* Order *]*]*
Cart Approval Notes Displayed here
(ZASMT18 04/30/2019 09:35:37 EST)

Internal Note :

Notes added by Procurement for future reference will be displayed here

Item Notes:

Line 1	**Internal Note**	Internal Notes for Display Test
	Supplier Notes	Supplier Notes for Display Test

Appendices

Glossary

Allocability:	Term related to expenses and sponsored research and defined in GAP 200.320, Direct Costing on Sponsored Projects.
Allowability:	Term related to expenses and sponsored research and defined in GAP 200.320, Direct Costing on Sponsored Projects.
Approver:	A Buy@Duke user designated to approve shopping carts as the final step in the department's work flow. Approvers cannot edit carts.
Cost Center:	Financial code that defines the owner of costs or general operating expenses. Cost centers are organized by areas of responsibility and are associated with a specific business unit.
Cost Objects:	General term that describes financial codes that are assigned to a specific department or a specific project. For the purposes of Buy@Duke, cost objects may be either a cost center or a WBS element.
Duke Marketplace:	The part of Buy@Duke that contains Duke specific supplier catalogs.
Duke Technology Center Manager Catalogs	Duke Marketplace Catalogs supporting computer related purchases through Duke Stores.
G/L Account:	Financial code that identifies the specific item being purchased. They are used to classify transactions within a cost object.
Goods Receipt Confirmation:	Buy@Duke transactions acknowledging that an item or items that have been purchased have been received by the ordering department. If the purchase requires goods receipt, it must be performed in Buy@Duke before vendor payment will be issued.

Appendices Continued…

Hosted Supplier Catalog:	The part of the Buy@Duke system that contains products with Duke-negotiated pricing and descriptions. Hosted Catalogs are maintained by Duke Procurement and Supply Chain Management to ensure best pricing.
Non-Catalog Items:	See Text Items.
Personal Values List (PVL):	A customized list created by a shopper or submitter containing information used frequently. Some examples of values that can be stored in the Personal Values List include Cost Center, WBS Element, G/L Account, Material Group, and Supplier.
Procurement Substitutes:	See Team Members.
Punch-Out Supplier Catalog:	An electronic catalog maintained outside the Buy@Duke system. Supplier's catalogs maintain Duke-negotiated pricing and are accessible from Buy@Duke.
Resonableness:	Term related to expenses and sponsored research and defined in GAP 200.320, Direct Costing on Sponsored Projects.
Shopper:	A Buy@Duke user who initiates has the ability to create shopping carts, including adding items to the cart. Shoppers may or may not assign cost objects and G/L accounts. Shoppers do not have any purchasing authorization and must have carts reviewed by Buy@Duke submitters.
Submitter:	A Buy@Duke user who can create shopping carts but who also reviews, edits, and approves shopping carts created by shoppers. Submitters must verify or assign cost objects and G/L accounts assigned to a cart. Business units assign submission thresholds to submitters providing some level of purchasing authority. Carts that are above submitter thresholds or are for goods/services that require institutional approval move into the approval workflow upon submission.

Appendices Continued…

Team Members:	Colleagues of a shopper who have access to review and add items to a shopping cart during the first step of a department's work flow. A shopper role must include the appropriate submitters as team members.
Text Items:	Items or suppliers that are not contained in either Hosted Supplier Catalogs or Punch-Out Supplier Catalogs. Descriptions and other information about the items must be entered into the Buy@Duke by the Shopper.
WBS Element	Financial code which represents activities and actions to be carried out on a project. Sponsored projects are represented by WBS elements beginning with 2xx, 3xx, or Axx. Other projects (construction, capital projects, etc.) begin with 7xx.

Appendices Continued…

Special Procedures

Some departments order unique and specialty items that require additional steps. These items include:

- Animals;
- Radioisotopes;
- Select Agents (biological toxins);
- Professional and Consulting Services; and
- Additional items for School of Medicine as outlined in the Expense Approval Process.

The processes for ordering these items can be found here in the Procurement section of the Financial Services website.

Users should visit this site and click on the appropriate links to review guidance details.

The Buy@Duke Help Desk (phone: 681-1872) can assist in completing these orders.