Step-by-Step Guide

Table of Contents

Overview of Buy@Duke ................................................................................................................................. 2

To Access Buy@Duke ...................................................................................................................................... 4

Steps for the Shopper .................................................................................................................................... 5
- Shopper: Setting Defaults, Attributes, and Team Members ........................................................................ 5
- Shopper: Creating a Shopping Cart ........................................................................................................... 12
- Shopper: Selecting Items from Hosted Catalogs ..................................................................................... 14
- Shopper: Selecting Items from Punch-Out (Supplier) Catalogs ................................................................. 23
- Shopper: Selecting Non-Catalog (Text) Items ........................................................................................... 29
- Shopper: Adding or Changing Financial Information ............................................................................ 35
- Shopper: Creating a Confirming Order (Pay Invoice) ............................................................................ 37
- Shopper: Creating a Personal Values List ................................................................................................ 38
- Shopper: Checking the Status of Carts ...................................................................................................... 40
- Shopper: Entering Goods Receipt Status, Single Cart Search ................................................................. 43

Steps for Submitters ...................................................................................................................................... 45
- Submitter: Submitting Team Carts ........................................................................................................... 45

Steps for the Approver ................................................................................................................................ 52
- Approver: Reviewing Team Carts .............................................................................................................. 52
- Approver: Adding an Ad Hoc Approver or Reviewer ............................................................................ 58

Advanced Functions .................................................................................................................................... 61
- Canceling Goods Receipt Confirmation .................................................................................................... 61
- Entering Goods Receipt Status, Multiple Cart Search .............................................................................. 63
- Changing View of Carts in Work List ........................................................................................................ 66
- Creating a Standing Order Shopping Cart ................................................................................................ 70

Appendices .................................................................................................................................................... 72
- Glossary ..................................................................................................................................................... 72
- Animal Ordering Process .......................................................................................................................... 74
- Radioisotope Ordering Process ................................................................................................................ 75
- Select Agent Ordering Process ................................................................................................................ 76

Revised Date: 1/3/2013 10:53 AM
Overview of Buy@Duke

Buy@Duke is the web-based tool that Duke employees will use to purchase goods and services. It is a component of the SAP enterprise system.

There are three roles that are assigned to employees who use the Buy@Duke system:

1. **Shopper**
   - Selects items and places them in a Shopping Cart
   - May OR may not assign financial information (Cost Objects, G/L Accounts)

2. **Submitter**
   - Reviews and Edits Team Shopping Carts
   - Assigns or confirms financial information
   - May select items and place them in a Shopping Cart (refer to “Steps for the Shopper” section of the Guide)

3. **Approver**
   - Reviews Team Shopping Carts for allocability, allowability, and reasonableness
   - Makes final department approval of Team Shopping Carts

**Team Concept**

Departments may use the shopping team 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 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.

**Shopping Options**

Using Buy@Duke, Shoppers and Submitters will create a shopping cart, selecting items from three locations in the system:

1. **Hosted Catalogs**
   - Suppliers provide product listings and Duke-negotiated pricing for items in this electronic catalog.
   - Prices and descriptions are updated and reviewed by Duke 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.
2. **Punch-Out (Supplier) Catalogs**
   - Shoppers and Submitters connect directly to a supplier's complete electronic catalog within the Buy@Duke framework.
   - Pricing and descriptions are maintained by the supplier.
   - Each website is maintained by the supplier and will look and navigate differently.

3. **Non-Catalog (Text) Items**
   - Shoppers and Submitters may order goods and services that are not found in either a Hosted or a Punch-Out (Supplier) catalog.
   - Item descriptions and supplier information are entered manually as text orders.
   - Shoppers and Submitters may request payment for invoices by entering a Confirming Order.

**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 than is available using Tool Tips.

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 pale green 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 web browser and enter the URL http://work.duke.edu to go to the Duke@WORK web site.

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

3. Click on the Enter button to proceed to the Duke@WORK web site.

   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, click on the Buy@Duke tab.
Steps for the Shopper

Shopper: Setting Defaults, Attributes, and Team Members

1. Ensure the **Buy@Duke** tab is selected.

2. Click on the **Personalization** page. This opens the SRM User Settings **Display Document** screen.

3. On the **Display Document** screen, click on the **Edit** button to switch to the edit mode.
4. Review the **Personal Data** section and note the following:
   - Notice the red asterisks next to certain fields indicate that you must enter information in those fields. See the steps below.
   - Other fields are optional and may be changed if needed.
   - Be sure to save the information you have entered when done.

5. To enter the **Form of Address**, click on 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.

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, click on the **Save** button.
11. Once your Personal Data 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 the shopping cart. The PVL may be accessed from a drop-down list in the field.
- Once in the 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 field that were set via Attributes. The drop-down list will be available to save keystrokes.
- In addition, you may also manually enter a value for a shopping cart field.

12. Click on the Edit button to switch to the edit mode (Save button will now display).

13. Click on the Drop-down button in the Attributes field to display the list of available attributes (see next page for descriptions).
14. Review the list of Attribute descriptions below to determine which Attributes to set and follow the next steps to set the values. **Some or all of the values listed below may be set by your business/administrative office.**

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
</tr>
</thead>
</table>
| Account Assignment Category   | Choose a value that indicates what type of Cost Object (Fund Code) will be used most of the time.  
  - **Asset** = used only by central administration departments  
  - **Cost Center** = indicates that the seven-digit fund being used for the purchase is a Cost Center (funds beginning with 15x, 4xx, 6xx, 8xx, and others considered to be non-restricted)  
  - **WBS** = indicates that the seven-digit fund being used for the purchase is a WBS Element/Project (restricted funds beginning with the 20x – 39x, as well as 7xx non-restricted funds) |
| Company Code                  | **DO NOT CHANGE THE VALUE ALREADY SET.** This value indicates the entity to which your department belongs.  
  - **Duke University** (including SOM, SON, and University departments) = 0010 |
| Cost Center                   | Enter as many lines as needed to list the seven-digit Cost Center value(s) that may be used on a cart (funds beginning with 15x, 4xx, 6xx, 8xx, and others considered to be non-restricted). Select one as the Standard. |
| Delivery Address              | Enter as many lines as needed to list the building numbers that correspond to the delivery address for a building to help suppliers know exact locations. Use drop-down to search by building name if needed. |
| Delivery Days                 | **DO NOT CHANGE THE VALUE ALREADY SET.** This value will not prevent deliveries from being made as soon as a vendor 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. |
| Goods Recipient               | Enter one or more lines as needed to tell the supplier who should receive the ordered items. If deliveries may be made to two different buildings, labs, or locations within a building, you may wish to list one goods recipient for each scenario. **Note this field displays only 14 characters; abbreviate the names as needed.** |
| Material Group                | Enter one or more lines to identify the three-numeral Material Group that describes the items ordered in a shopping cart. Department users should only enter Material Groups 001-019. |
| Non-Valued GR Flag            | If your department has directed that a goods receipt confirmation should be done for each cart to indicate that items were received from the vendor (whether you actually do the goods receipt in Buy@Duke or someone else in your department does this process), enter an **upper case X** in the value field. |
| Room Number                   | Enter one or more lines as needed to indicate the room number in a building where the goods should be delivered. |
| Team Shopping Cart            | If your department or division 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 (must be upper case). |
| WBS Element                   | Enter as many lines as needed to list the seven-digit WBS Element values that may be used on a cart (funds beginning with the 20x – 39x, as well as 7xx non-restricted funds). Remember to set one as a standard. |
15. Select the Attribute you wish to edit by clicking on its title in the list (use scroll bar as needed).

![Attributes for User BROCK005](image)

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

![Attributes for User Position/Manager](image)

17. Click on the button in the **Standard** column.

18. 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.

19. Click the **Check** button to see if the data you entered are correct. If not, make the correction.

20. If the data do not contain errors, click the **Save** button (may enter several Attributes and then click on the Save button if preferred).

21. Repeat steps 13-20 above to select other attributes from the Attributes list, enter the desired values, and check and save the data (make sure to click back on the **Edit** button after the Save button is used).
22. Once your Attributes are set, add **Team Members** (Procurement Substitutes) to your Team.

   **Note:** *Team Members are colleagues in your department who may view your shopping carts. **Shoppers must add their Submitters as Team Members.***

23. Click on the **User Account** tab.

24. Click on the **Edit** button to switch to the Edit mode (the Save button displays if Edit has been selected).

25. In the **My Procurement Substitutes** box, click on the **Add Line** button.

26. On the new line, click in the **Name of Substitute** field and click on the **Search** button.

27. In the Search box, enter the **last name** of the Team Member you wish to add and click on **Start Search**.
28. In the resulting list, click on the selection button to highlight the line that contains the User ID and name of the Team Member.

29. Once the team member is highlighted, click the OK button to display the User ID of the selected Team Member in the Name of Substitute field.

30. 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 end date use 12/31/9999 to leave open ended).

Note: If you expect the Team Member to be on your team for an extended period of time, enter the date 12/31/9999. This will ensure that the team assignment will not end, eliminating the need for you to update the assignment again. If you wish to end the assignment in the future, you will simply Remove the line at that time.

31. Click the Check button to verify the data.

32. To continue to add Team Members, repeat steps 25-32.

33. Shoppers must add their Submitters as Team Members.

34. After you have entered all your Team Members, click the Save button.
Shopper: Creating a Shopping Cart

1. Click on 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.

3. If you need to make any changes, follow the steps in the **Setting Defaults** section of this guide. Having current information in this section will save you time after you’ve selected items for your cart.

4. To change the name of the cart enter a new name in the **Name of Shopping Cart** field.

5. To change any of your default Attributes settings, if desired, click on the **Set Values** link.

   **Note:** Any changes you make in the Change Default Settings box will overwrite the SRM User Settings you previously set. The changes will apply only to this specific shopping cart.

6. Select the **Item Basic Data** tab and make the desired changes. For example, you might change the Room Number and the Goods Recipient (GR).

7. Click on the other tabs and make any desired changes.
8. Click **OK** to save the changes. This will return you to the Create Shopping Cart window.

9. If the box next to **Team Shopping Cart** is not checked, click in the box to place a check mark, which allows the Team members you selected to view and edit this shopping cart. **Shoppers must check this box in order for Submitters to review their carts.**

10. **DO NOT USE** the Approval Process and Document Changes links.

11. If you wish to submit a Note to your Approver, enter it in the **Approval Note** box.

   **Note:** *In the Firefox browser, you may resize the Approval Note field by dragging the lower right-hand corner. This will prove helpful in seeing many notes, eliminating the need for continuous scrolling.*

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 Hosted Catalogs;
   - Selecting items from Punch-Out (Supplier) Catalogs; and
   - Adding Non-Catalog (Text) Items.

   Follow the steps outlined below.
Shopper: Selecting Items from Hosted 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. On the Marketplace home page, select an item from a Hosted Supplier Catalog using the search function by clicking on the Supplier's button to open a Search Box specific to that Supplier.

4. Enter a description of the item or its catalog item number if you wish to place it in your cart, and then click on the Search button.

5. A list with all the items matching your criteria will appear in the Duke Marketplace window rather than in a separate supplier website.
6. Review the functions across the top and along the left side.

7. In the left-hand sidebar, add keywords to your search by entering the words and clicking on the Go button. In this example, using “glass” as keyword reduced the original list from 1401 items to 10 items that include the word “glass” in their descriptions.

8. In the Filter Results box, narrow or broaden the list by clicking on the various search criteria: Category; Packaging UOM (Unit of Measure); Result Type; or Manufacturer Name.

9. Click on the funnel icon to view the criteria list.
10. Click in the box next to the items you wish to include as filter criteria.

11. Click on the **Filter** button and review the resulting list.

12. 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.

13. To add an item to a **Favorites folder**, select it from the list and click on **Add Favorite** to open the Favorite window. Using favorites will save time by eliminating searches for specific items you order on a regular basis.
14. To create a folder, which must be done the first time you add a favorite, click on the **New** button and select **Top Level Personal Folder**.

15. When prompted, **enter a name for the folder** and an optional description. Then click on the **Save** button.

16. Once the folder is created and saved, click **Submit** to actually add the product to the newly created Favorites folder.
**Note:** In the future, you may begin your shopping cart by going directly to the Favorites folder, bypassing the various search functions.

17. Click on the **Close** button.

18. Notice that the item you placed in your Favorites folder now has a star in its listing.

19. To place items in the cart, review the list of items, select the specific item, and click on the **Add to Cart** button.

20. Whenever you wish to view the entire cart, click on the **cart name at the top right**. When you click on the cart name you will lose the current Search list.

21. To return to either the Hosted Supplier or Punch-Out Supplier catalogs, click on the **Home/Shop** page.

22. To conduct a search for an item using Hosted and select Punch-Out catalogs (marked with an asterisk *), enter the item description in the **Shop Hosted Catalogs** box and click on the **Go** button.
23. Once the list appears, notice the **By Supplier** list in the left sidebar.

24. Click on the **More** button to see the entire list.

25. Narrow your search by selecting criteria or begin searching the entire list of items.

26. Note that items from a Hosted Supplier Catalog will have the **Add to Cart** button in their boxes.

27. Note that items from Punch-Out Supplier catalogs will have an **Order from Supplier** link in their boxes.

28. Once you’ve added all the items you wish to place in your cart, review the cart by clicking on its name in the top right corner.

29. If you have finished shopping, click on the **Finish Shopping** button to return to the **Create Shopping Cart** page in the Buy@Duke website.

30. If you wish to add **Attachments** or **Notes** to the items in your cart, follow steps 32-35 below. **Some purchases require Attachments and Notes.** If you will not add these, proceed to step 41 to complete your cart.

31. If your department requires you to enter a Cost Object and G/L Account for the items in your cart follow steps 36-40 below. If not, proceed to step 41 to complete your cart; the financial codes will be entered by your Submitter at a later time.
**Shopper: Adding Notes and Attachments to a Shopping Cart**

32. Any quotes or other documentation received from suppliers should be referenced in the **Notes** section and attached to the shopping cart in the **Attachment** section. These fields are row specific.

33. Access the note option by clicking on the number in the **Notes** column of the line item or on the number in the **Line Item** column. This will open the Details section below the Item Overview. Two types of notes may be recorded with the cart:

- **Internal Notes** are intended for communication within Duke only. The notes are not visible on purchase orders sent to suppliers. Use this field for justifications, order notes, and other internal purposes.
- **Supplier Text** should be used to communicate details about the order with the supplier. The text will appear on the purchase order when it is sent to the supplier. This field could include reference quote numbers, promotional codes, detailed descriptions for item ordered, lot numbers, and other supplier-specific information.

34. Attach any supporting documentation to the cart by clicking on the number in the **Attach.** Column or on the number in the **Line Item** column. This will open the Details Section below the Item Overview.

35. Click the **Add Attachment** button to open the Add Attachment window. Use the **Browse** button to search for the file you wish to attach. Once file is selected, click **Open**. Enter a description to help identify what is attached. Check or uncheck **Visible Internally only** as needed. When checked this indicates attachment should not be shared outside of Duke. Repeat for each attachment.
Shopper: Assigning Financial Information to a Shopping Cart

36. To enter the financial information, scroll over to the **Account Category** column and select the appropriate **Cost Object** from the drop-down list.

37. Click into the **Account Assignment** field and enter the Cost Object.

38. Tab into the **G/L Account** column and enter the appropriate account.

39. Then press the **Enter** key on your keyboard.

40. Follow steps 36-39 for remaining line items.

41. Next, regardless of whether you entered financial information, notes, or attachments, click the **Check** button.
42. Review the white box at the top for any messages and take action as follows:
   • If you entered financial information and see error messages related to Account Assignments, make the corrections.
   • If you did not enter financial information, you may ignore the financial error messages as your cart Submitter will make the financial account assignments.

43. Follow any other instructions you see in the white box.

44. You may add more items to the Duke Marketplace shopping cart by:
   • Selecting items from another Hosted Catalog; or
   • Selecting items from a Punch-Out (Supplier) Catalog; or
   • Adding Non-Catalog (Text) items.
     Follow the steps outlined elsewhere in this document.

45. To save the cart, click the **Save** button. Notice that the Status indicator will change to Saved with a date and time stamp. You may return to the cart later to add other items or change other information.

46. If you wish to notify your Team Members (Purchasing Substitutes) that the cart is saved, click the **Notify** button and select All Team Members from the menu. This action will also save the cart, making the Save action above redundant.

47. If you have completed the cart and wish to notify your Submitters that the cart is ready for their review, click the **Notify** button and select from the menu either:
   • **Submitters** to notify all your Submitters; or
   • the email address of just one Submitter to notify only him or her.
     This action will also save the cart, making the Save action above redundant.

48. Close your browser.
Shopper: Selecting Items from Punch-Out (Supplier) Catalogs

1. Click on the **Add Item** button and select **Duke Marketplace**.

2. Shopping from a Punch-Out (Supplier) Catalog has a few limitations:
   - Supplier Catalogs are maintained by suppliers and not by Duke Procurement staff members. Therefore, changes in pricing, descriptions, item numbers, and other important purchasing information may change without notice.
   - Shoppers cannot identify product favorites on the supplier’s website and save them into the Favorites folder on the Duke Marketplace website. They will be saved only on the supplier’s punch-out site.
   - Shoppers cannot create draft carts at the supplier’s website and save them back into their Duke Marketplace cart.

3. Select a supplier for your items by clicking on the box with the supplier’s name.

4. 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.

5. Once in the supplier’s website, confirm that this is the Duke-specific supplier site by locating the Duke logo at the top of the page.
6. If you know the supplier’s catalog item number, enter the number and other requested information (quantity, unit of measure) in the appropriate fields and click on the Search, Find, or Add to Basket button.

7. If you do not know the supplier’s catalog item number, enter a description of the item you wish to view in the appropriate search field and click on the Search, Find, or Go button.

8. In the resulting list, narrow the list by selecting criteria using the various functions.
9. Use the various functions of the supplier’s website to learn more about items and compare them, if you wish.

10. Once you have selected an item for your shopping cart, click on the link describing the item. This action will direct you to an item detail screen.

11. Enter the quantity and add it to your cart, basket, list, or whatever term the supplier uses on the website.

12. Repeat steps 6-11 until you have placed all the items in the shopping cart.
13. Once you have placed all items in the shopping cart for this supplier’s website, perform the checkout functions as outlined. This action will return you to the Duke Marketplace.

14. Notice on the Duke Marketplace website that you have now created a shopping cart.

15. At the top right, notice that there is a link for the cart with a name that includes the date, your Net ID, and the cart number for the day (01 if it is the first cart).
16. Note that any time you are in the Marketplace you will see this cart link. Click on the cart link at any time to return to the cart.

17. If desired, change the name of the cart by entering new text in the **Name This Cart** field and click on the **Update** button.

18. Continue shopping by clicking on the **Continue Shopping** link.

19. When you finish shopping, click on the **Finish Shopping** button.

20. To view more information about the supplier, click on the **Supplier's name** or the **More Info** link.

21. To return to the supplier’s website:
   - Use the **Modify Items** link to return to the ordering screen and make changes; or
   - Use the **View Items** links to return to the ordering screen with a view-only display. No changes can be made in the view-only mode.

22. To delete an item, use the **Remove** button in the **Product Description** field.

23. To view detailed information about the product, click on the **item name**. This action will open a new window with the information.

24. The **Product Type** icon identifies the item as a Punch-Out item, coming into Duke Marketplace from a supplier’s website.

25. The remainder of the Product Information box summarizes the product information and pricing.

26. To change the quantity, simply change the number and click the **Update** button.

27. To return to either the Hosted Supplier or Punch-Out Supplier catalogs, click on the **Home/Shop** page or click on the **Continue Shopping** link.

28. You may add more items to the Duke Marketplace shopping cart by:
   - Selecting items from another Punch-Out (Supplier) Catalog; or
   - Selecting items from a Hosted Catalog; or
   - Adding Non-Catalog (Text) items.
     Follow the steps outlined elsewhere in this document.

29. Once you’ve added all the items you wish to place in your cart, review the cart by clicking on its name in the top right corner.

30. If you have finished shopping, click on the **Finish Shopping** button to return to the **Create Shopping Cart** page in the Buy@Duke website.
31. If you wish to add **Attachments** or **Notes** to the items in your cart, follow steps 32-35 outlined in “Adding Notes and Attachments to a Shopping Cart” on page 20. Some purchases require Attachments and Notes. If you will not add these or assign financial information, proceed to step 33 to complete your cart.

32. If your department requires you to enter a Cost Object and G/L Account for the items in your cart, follow steps 36-40 outlined in “Assigning Financial Information to a Shopping Cart” on page 20. If your department does not require you to enter the financial codes, the information will be entered by your Submitter at a later time.

33. Next, click the **Check** button.

34. Review the white box at the top for any messages and take action as follows:
   - If you entered financial information and see error messages related to Account Assignments, make the corrections.
   - If you did not enter financial information, you may ignore the financial error messages as your cart Submitter will make the financial account assignments.

35. Follow any other instructions you see in the white box.

36. You may add more items to the Duke Marketplace shopping cart by: selecting items from another Hosted Catalog; selecting items from a Punch-Out (Supplier) Catalog; or adding Non-Catalog (Text) items. Follow the steps outlined elsewhere in this document for these transactions.

37. To save the cart, click the **Save** button. Notice that the Status indicator will change to Saved with a date and time stamp. You may return to the cart later to add other items or change other information.
38. If you wish to notify your Team Members (Purchasing Substitutes) that the cart is saved, click the Notify button and select All Team Members from the menu. This action will also save the cart, making the Save action above redundant.

39. If you have completed the cart and wish to notify your Submitters that the cart is ready for their review, click the Notify button and select Submitters or a single Submitter’s email address from the menu. This action will also save the cart, making the Save action above redundant.

37. Close your browser.

**Shopper: Selecting Non-Catalog (Text) Items**

1. Click on the Create Shopping Cart link to open a cart.

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

3. Tab into the Supplier Catalog Number field and enter the supplier’s catalog number for the item.

4. Tab into the Supplier ID field. If you know the Supplier ID number, enter it in the field.

5. If you do not know the Supplier ID number:
   - Click on the drop-down button.
   - In the Business Partner box, type in a portion of the supplier’s name, using asterisks as text wildcards.
   - Click on the Start Search button.
   - In the resulting list, click once on the Business Partner number to select the number and populate the field.

6. In the resulting list, click once on the Material Group to select the number and populate the field.

7. Tab into the Material Group field.
8. If you know the three-digit Material Group number, enter it in the field.

9. If you do not know the Material Group number:
   - Click on the drop-down button.
   - In the Search Material Group box, enter an asterisk.
   - Click on the **Start Search** button.
   - In the resulting list, click once on the Material Group to select the number and populate the field. **Use only a Material Group between 001-019.**

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

11. Tab into the **Unit of Measure** field.
12. If you know the Unit of Measure, enter it in the field.

13. If you don’t know the Unit of Measure:
   - Click on the drop-down button.
   - In the Unit of Measure: All List, enter an asterisk in the Unit Text field.
   - Click on the Start Search button.
   - Review the Unit Text list and click once on the desired unit of measure to select that value and populate the field.

14. Tab into the Price field and enter the unit price for the item.

15. Check the value in the Delivery Date field. If you wish to change the date, click in the field and enter the new date.

16. To change the Room Number and Goods Recipient from your default settings, click on those fields and enter the changes.

17. If you wish to add Attachments or Notes to the items in your cart, follow steps 32-35 outlined in “Adding Notes and Attachments to a Shopping Cart” on page 20. Some purchases require Attachments and Notes. If you will not add these or enter financial information, proceed to step 25 to complete your cart.
18. If your department requires you to enter a Cost Object and G/L Account for the items in your cart, follow steps 36-40 outlined in "Assigning Financial Information to a Shopping Cart" on page 21. If your department does not require you to enter the financial codes, the information will be entered by your Submitter at a later time.

19. Review the information for this line item by clicking on the Details button or on the number in the Line Item column. The information appears on the series of tabs below the Item Overview box.

20. Click on the Supplier Info tab and enter the supplier’s assigned identification number in the Supplier field.
21. If you know the supplier number, enter it into the Supplier field and click the **Assign Supplier** button.

22. If you don’t know the supplier ID number:
   - Click the drop-down button.
   - In the **Supplier: General Value List**, click in the **Name 1** box and enter a portion of the supplier’s name, using asterisks as text wild cards.
   - Click the **Start Search** button.
   - In the resulting list, click once on the desired Business Partner entry to select that value and populate the field.

23. Returning to the Supplier Information tab, click the **Assign Supplier** button.

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

25. You may add more items to the Duke Marketplace shopping cart by:
   - Adding other Non-Catalog (Text) items;
   - Selecting items from another Punch-Out (Supplier) Catalog; or
   - Selecting items from a Hosted Catalog.
     Follow the steps outlined elsewhere in this document.

26. To save the cart, click the **Save** button. Notice that the Status indicator will change to **Saved** with a date and time stamp. You may return to the cart later to add other items or change other information.
27. If you wish to notify your Team Members (Purchasing Substitutes) that the cart is saved, click the Notify button and select All Team Members from the menu. This action will also save the cart, making the Save action above redundant.

28. If you have completed the cart and wish to notify your Submitters that the cart is ready for their review, click the Notify button and select Submitters or one Submitter’s email address from the menu. This action will also save the cart, making the Save action above redundant.

29. Close your browser.
Shopper: Adding or Changing Financial Information

Financial account information for Buy@Duke line items is set by default using Personalizations. However, there will be instances when this information might need to change. In some departments, Shoppers will be asked to make these changes. In other departments, these changes will be made by Submitters or Approvers. Check with your grant manager or business office for your department’s preference.

1. To review the detailed financial account information, click on the **Detail** button.

2. Click on the **Account Assignment** tab. Review and confirm the correct account assignments OR assign the correct accounting as outlined in the next steps.

3. Review the **Clipboard** field and if you see a Cost Object and GL Account combination you wish to use for the item, click the **Paste** button.

4. To use this same combination for all the items in the cart, click the **Change All Items** button.

5. Review the **Assign Number** field to confirm the assignment.

6. To use another combination of Cost Object and GL Account, manually enter the Cost Object and GL Account numbers directly in the **Assign Number** and **General Ledger Account** fields. (You may need to scroll to the right to see these fields.)
7. 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:
- Percentage,
- By Quantity, or
- By Value.

   **Note:** Notice how the column heading changes.

8. Click the **Split Distribution** button to display additional lines for more entries.

9. Change the amounts in the second column, however it is now labeled, adding the Cost Object and GL Account assignments for each line.
10. Click the **Check** button and look in the message box for any actions you must take for this line item.

11. Work through the other line items following steps 6-10 above to assign the accounts.

12. Click the **Save** button to save the entered data. You may save as often as you feel comfortable.

**Shopper: Creating a Confirming Order (Pay Invoice)**

Buy@Duke users may use the system to pay invoices. This requires creating a **Confirming Order**.

1. Create a **Text Order** as shown in the previous section.

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

3. In the **Approval Note** field, add the text **Confirming Order PO**.

4. Using the **Notes and Attachments** tab, add a note in the **Supplier Text** box indicating that this is a confirming order for the payment of an invoice.

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

6. After receiving department approvals, the cart will route to Procurement Services for processing with a PO number beginning with the numbers 8505.

7. Procurement Services staff will print the invoice and send it to Accounts Payable for payment. The purchase order will not be sent to the Supplier, generating another order.
Shopper: Creating a Personal Values List

The **Personal Value List** 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: Cost Center, WBS Element, G/L Account, Material Group, and Supplier.

1. Click in the Column that contains the value you wish to add to your Personal Value List.

2. Click on the Drop-Down icon.

3. In the resulting search box, enter the desired value in the corresponding box and click the **Search** button.

4. When a line containing the value appears in the subsequent field, right click on the line and select **Add to Personal Value List**.
5. When a line containing the value appears in the **General Values** field, highlight the line.

6. Click the **Add to Personal Value List** button and check the confirmation message.

7. Click **OK** to close the box.

8. Returning to the **Create Shopping Cart** screen, click the drop-down button in the field. This action will open a box that contains the personal values you have selected. Highlight the line of the value you wish to use and click **OK**.

9. In subsequent visits, you may wish to search for values beyond your personal list. To perform this action, click the **Go to the General Values** List link.

10. Search for a new value as outlined above.

11. Repeat these steps for the remaining values you wish to add to your Personal Value List.
Shopper: Checking the Status of Carts

1. Under the Create Shopping Cart icon, review the list of Shopping Carts displayed in the table.

2. To see the Shopping Carts you created, be sure the **Shopping Carts** tab is selected. (The tab color will be dark blue).

   **Note:** The current view on the Shopping Carts tab does not display all completed shopping carts (i.e., carts that have not been fully processed to a purchase order). The steps below outline how to show all carts, including completed carts.

3. To see the Shopping Carts your Team created, click the **Team Carts** tab.

4. To see all carts, including those completed and processed into a Purchase Order:
   - Scroll to the right of the screen, and click on the **Change Query Link**.
   - Find the **Include Completed Shopping Carts Selection** check box.
   - Click in the box to the right to display a check mark.
   - Click on the **Apply** button.
• Once the window closes, click the **Refresh** button. All shopping carts will be displayed on the Shopping Carts tab.

5. To narrow the list of Shopping Carts, click the **Show Quick Criteria Maintenance** button.

6. Select a single criterion or various criteria to use for the search (e.g., search by date, using either the Creation Date or Timeframe).

7. After selecting the criteria, click the **Apply** button.

8. To return to the original list, follow these steps:
   • Remove the search criteria.
   • Click the **Apply** button.
   • Then click the **Hide Quick Criteria Maintenance** button to close the box.
9. Once the list of carts has been selected, notice the column headings. The information in the columns may be sorted in numerical or alphabetical (and their reverse) order by clicking on the column header.

10. Review the Item Status entries. The most common entries are:
   - **Saved**, which indicates that the Shopping Cart is waiting for your Submitter to take action;
   - **Awaiting Approval**, which indicates that your Submitter has submitted your cart to your approver for his or her action;
   - **Approved**, which indicates that your Approver has approved the cart. Your cart may require further review and approval, such as approval by Procurement Services if an item’s cost is $2500 or more; and
   - **Follow On**, which indicates that a Purchase Order has been created and sent to the supplier.

11. Click on either the **Shopping Cart number** or the **Item Status** to see the actual Shopping Cart.

12. Once you have finished checking the status of your carts, close your browser or continue performing other Buy@Duke functions.
Shopper: Entering Goods Receipt Status, Single Cart Search

To search for a Cart using the list of all outstanding Confirmations, refer to “Entering Goods Receipt Status, Multiple Cart Search” in the Advanced Functions section.

1. On the Buy@Duke tab, click on the Receiving page.

2. Click on the Confirmation link in the left-hand sidebar.

3. In the resulting Confirmation window, enter the Purchase Order number in the Purchase Order number box. You will find the Purchase Order number on the packing slip that came with the items.
4. Click the **Search** button.

5. In the Search Results list, be certain that the line item is selected.

6. Click the **Start** button.

7. On the **Create Confirmation** page, make certain the **Overview** tab is selected.

![Create Confirmation page]

8. In the **Confirm Quantity** field, enter the number of items you have received. You may confirm receipt of multiple items at one time.

9. If you receive less than the number of items you ordered, but you choose not to wait for future delivery, click the **Last Delivery** box.

10. Once you've completed entering the confirmation quantities and clicking the appropriate Last Delivery boxes for all items, click the **Confirm** button.

11. Review the text in the **Confirm Document** box. Click **Yes** to continue.

![Confirm Document box]

12. Review the confirmation message in the dialog box. Click **Close**.

![Confirmation message dialog box]
Steps for Submitters

Submitter: Submitting Team Carts

1. On the Buy@Duke page, use the tabs to display shopping carts.
   - **Shopping Carts** tab to display the shopping carts that you have created as a Shopper;
   - **Confirmations** tab to display the shopping carts that are awaiting Goods Receipt;
   - **Team Carts** tab to display the shopping carts that were created by your Team Members; and
   - **Confirmations for Team Carts** tab to display the Team shopping carts that are awaiting Goods Receipt.

2. To begin the submission process, click on the **Team Carts** tab.

3. Notice the **Shopping Cart Number**, **Name**, and **Item Numbers**. Some carts have multiple line items to indicate that the cart has more than one item.

4. To review and submit a cart, click on the **Shopping Cart Number**. This will open a detailed view of the cart.
5. Once you’ve opened the detailed view, review the **General Data section** Check the **Notes** or **Attach.** box for information your Shopper has provided for you. The number zero (0) indicates there is not a note or attachment. A numeral indicates how many notes or attachments are present.

6. Review the **Item Overview** section. The first item will be highlighted. To select subsequent items, click on the button to the left of the item number or use the arrow on the Details for Items tab.

7. Once you’ve selected an item in the Overview section, work your way through the tabs on the bottom half of the screen.

8. On the **Item Data** tab:
   - Review the details about the item.
   - Click the **Take Over** button.
   - Make the desired changes.
   - Click the **Save** button.

9. Click on the **Account Assignment** tab. Review and confirm the correct account assignments OR assign the correct accounting as outlined in the next steps.
Note: This is an important step, as one of the Submitter’s primary responsibilities is assigning the correct fund information. For carts supporting Sponsored Research, it is the Submitter’s responsibility to assess and validate allocability, allowability, and reasonableness.

10. Note that carts created by some shoppers in departments will not have a Cost Object in the Assign Number field or a GL Account in the General Ledger Account field for their Line Items.

11. Review the Clipboard field and if you see a Cost Object and GL Account combination you wish to use for the item, click the Paste button.

12. To use this same combination for all the items in the cart, click the Change All Items button.

13. Review the Assign Number field to confirm the assignment.

14. To use another combination of Cost Object and GL Account, manually enter the Cost Object and GL Account numbers directly in the Assign Number and General Ledger Account fields. (You may need to scroll to the right to see these fields.)

15. 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:
   - Percentage,
   - By Quantity, or
• By Value.

**Note:** Notice how the column heading changes.

16. Click the **Split Distribution** button to display additional lines for more entries.

17. Change the amounts in the second column, however it is now labeled, adding the Cost Object and GL Account assignments for each line.

18. Click the **Check** button and look in the message box for any actions you must take for this line item.

19. Work through the other line items following steps 10-18 above to assign the accounts.

20. Click the **Save** button to save the entered data. You may save as often as you feel comfortable.

21. Move to the **Notes and Attachments** tab and check for any Internal Notes and Supplier Text Notes.
22. If any Notes are present, click on the link to open the Note, review the text, and then click the Close boxes.

23. Check the Attachments box for any attached documents.

24. If any attached documents are present, click on the link to open the attachment, review the attachment, and then click the Close boxes.

25. On the Delivery Address tab, check to see if the correct Delivery Address is present.

26. If the delivery address is not correct or is not displayed, follow these steps to edit:
   - Click the drop-down button on the top line.
   - In the Delivery Address box, type a portion of the name of the building in the addr1 box, using asterisks as text wildcards.
   - In the resulting list, double click on the line containing the name of the desired building to return to the Delivery Address tab and see the address detail.
27. On the **Supplier Info** tab, review the supplier's name and number.

28. On the **Approval Process** tab, review the various approvals required for the cart.

29. On the **Related Documents** tab, note that the Purchase Order information will be provided after the cart has received all approval and has been converted into a Purchase Order.
30. Purchase Order numbers use the following numbering scheme:

- 455xxxxxxx: One-time Purchase Order created using Buy@Duke
- 4605xxxxxx: Framework Order created using Buy@Duke
- 8505xxxxxx: Bill Only Purchase Order created using Buy@Duke

31. Once you have reviewed all the information about the cart and entered all the required data for each item, click the **Order** button to send the cart to the next step in the approval process.

32. Close your browser. The cart will automatically move to your Approver for review and further action if needed.
Steps for the Approver

Approver: Reviewing Team Carts

1. Approvers may view Shopping Carts requiring their approval by clicking on the link in the notification email.

2. Approvers may view also Shopping Carts by logging into the Duke@Work website (http://work.duke.edu) and clicking on the Universal Work List tab.

3. Be certain the Tasks tab is selected. If not, click on the tab, turning it dark blue.

4. You may have other documents (iForms, Journal Vouchers) to review and take action on.
5. Identify the Shopping Cart you wish to review and approve in the Subject column and highlight the row. This action will open a preview of the cart below the Universal Worklist.

6. You may take action on the cart by reviewing it in the preview window and clicking the appropriate button:

- Approve: approve the cart without opening a detailed view;
- Reject: reject the cart, returning it to its Submitter;
- Details: opens the detailed view of the cart;
- Print Preview: opens a print window of the cart's line items;
- Resubmit: removes the cart from your Universal Worklist and brings it back for review on the specified date;
- Forward: sends the cart to another Approver; or
- Assign to Me: permits you to be the sole “owner” of the cart’s workflow when there may be numerous approvers. If you click Assign to Me, other approvers will not be able to view or edit the cart.
7. You may also take action by clicking directly on the **Complete Shopping Cart** link to open a detailed view of the cart.

8. Review any Notes in the Approval Note box. If you wish to add a comment, click the **Add Comment** link and type it into the box.

9. Select an item in the Item Overview section and click the Details or on the number in the Line Item column button.

10. Work your way through the tabs on the bottom half of the screen.

11. If you need to make any changes to the data for the Shopping Cart, click the Edit button.
12. The Additional Information box cautions that any changes may lead to a change in or a restarting of the approval process.

13. Click OK or Cancel as appropriate.

14. On the **Item Data** tab, review the details about the item.

15. On the **Account Assignment** tab, review the financial account assignments.

16. On the **Notes and Attachments** tab, check for any Internal Notes and Supplier Text Notes.
17. If any Notes are present, click on the link to open the Note, review the text, and then click the Close boxes.

18. Check the Attachments box for any attached documents.

19. If any attached documents are present, click on the link to open the attachment, review the attachment, and then click the Close boxes.

20. On the Delivery Address tab, review the Delivery Address.

21. On the Supplier Info tab, review the supplier’s name and number.

22. On the Approval Process tab, review the various approvals required for the cart. If additional ad hoc approvals are needed, add them by following the steps beginning on page 52.
23. On the **Related Documents** tab, Note that the Purchase Order information will be provided after the cart has received all approval and has been converted into a Purchase Order.

24. Continue the above steps for each item.

25. If you have questions about the Shopping Cart or find things that need to be corrected, click on the **Add Comment** link and enter your question or request in the **Approval Note** field.
26. Then click the **Inquire** button. This action will return the cart to the Submitter for the information you seek or for corrections to be made.

27. Once you have reviewed all the information about the cart, click the **Approve** button to send the cart to the next step in the approval process.

28. **You should never click the Reject button.** If you have questions or concerns about a Shopping Cart, use the Inquire process outlined above.

29. Close your browser. The cart will automatically move forward to become a Purchase Order OR move to external departments for review and further action if needed.

### Approver: 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. Open the cart requiring the Ad-Hoc Approval or Review.
2. Click on the **Approval Process: Display/Edit Agents**.
3. From the **Approval Process Overview** window, click on the **Header** tab.

4. Click the **Add Approver** button to add an Approver or the **Add Reviewer** button to add a Reviewer.

5. In the **Add Approver** or **Add Reviewer** box, enter the approver’s Net ID or click the drop-down button to search for the Net ID by name. Then click **OK** to accept.
6. The Approver’s or Reviewer’s name will populate the **Processor** field.

7. Repeat steps above for all additional Ad Hoc Approvers or Reviewers.

8. Click the **OK** button and complete the order or approval process.

9. This specific cart will route to the Ad Hoc Approver or Reviewer after the initial approval has occurred.
Advanced Functions

Canceling Goods Receipt Confirmation

1. Obtain the Confirmation number by displaying either the Shopping Cart or the Purchase Order and viewing the Related Documents tab.

2. On the Shopping page, click on the Advanced Search link.

3. Search for the Confirmation document by entering the Confirmation number and clicking the Search button.
4. Select the Line Item of the item you wish to cancel by highlighting it. Then click the Cancel button.

5. Confirm the Cancelation by clicking Yes.

6. Repeat steps 4 and 5 for any other Line Items you wish to cancel. You can select multiple Line Items by holding the CTRL and SHIFT keys while clicking on the lines.

7. When you have canceled all the Line Items you wish, click the Confirm button.

8. You will receive a notification.
Entering Goods Receipt Status, Multiple Cart Search

1. On the Buy@Duke tab, click on the Receiving page.

2. The list labeled Purchase Orders-Confirmations Pending shows all currently pending confirmations in the Buy@Duke system.

3. Narrow the list by clicking on the Show Quick Criteria Maintenance button.

4. Enter your Requestor number by clicking on the search button in the Requestor field.
5. In the subsequent Business Partner Number box, enter your last name in the Name 1/last name field and click the Start Search button.

6. In the resulting box, select your name by clicking on the gray button on the left side of the line and click OK.

7. Click the Apply button. The resulting list will show the carts for which you are the Shopper or Submitter.
8. Narrow the list further by selecting other criteria, such as **Timeframe** or **Item Description**.

9. Click the gray button on the left side of the line that shows the Purchase Order whose Goods Receipt you wish to Confirm.

10. Click the **Create Confirmation** button.

11. Complete the Confirmation by following steps 7-12 on page 43.
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 **Setting** link on the far right of the screen.

![Setting link](image1)

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

![Display tab](image2)

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

![Hierarchy box](image3)

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**.

![Select columns](image4)
5. To save the settings, select **Save As**.

6. Enter a name in the **Description** field and click **OK**.

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

8. Click **Apply** to display the changes.
9. Below is an example of a shopping cart Work List view with the hierarchy set by cart approval status, then cart name, then item names.
10. Below is an example of a shopping cart Work List view with the hierarchy set by cart creator, then cart reviewer, then item status, then cart name, then item names.
Creating a Standing Order Shopping Cart

1. Click on 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 and add a note to the Approval Note field following your department’s guidelines.

3. Click on the **Add Item** button and select **Standing Order**.
4. In the **Add Item as Standing Order** box, fill in the fields:

   • **Description**: the goods or services to be ordered;
   
   • **Material Group**;
   
   • **Value Limit**: the upper limit of what you expect to spend for the duration of the Standing Order;
   
   • **Expected Value**: the amount you actually expect to spend for the duration of the Standing Order;
   
   • **Required**: the date of the duration of the Standing Order. 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.

5. Click **OK**. This will place the information from the Standing Order box in the Shopping Cart.

   ![Add Item as Standing Order](image)

6. Review the Detail information about the cart and make any appropriate changes.

7. Submit the Shopping Cart.

8. Once the Shopping Cart has been approved and the Standing Order is created, users will process orders as they have done previously.
## Appendices

### Glossary

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allocability:</td>
<td>Ensuring an expense that is charged to a sponsored project benefits the particular sponsored project to which it is charged. If the sponsored project only benefits from a portion of the expense, then only a reasonable portion of that expense should be charged to the sponsored project. In addition, the allocation method for determining the portion charged must be documented.</td>
</tr>
<tr>
<td>Allowability:</td>
<td>An expense that is necessary for performance of the project, consistent with the institution’s practices, and that is eligible for reimbursement by the Federal government.</td>
</tr>
<tr>
<td>Approver:</td>
<td>A Buy@Duke user designated to approve Shopping Carts as the final step in the department’s work flow.</td>
</tr>
<tr>
<td>Cost Center:</td>
<td>Financial code that identifies a specific department.</td>
</tr>
<tr>
<td>Cost Objects:</td>
<td>General terms that describes financial codes that identify a specific department or a specific project. Cost Objects may be either a Cost Center or a WBS Element. Commonly known as “fund codes.”</td>
</tr>
<tr>
<td>Duke Marketplace:</td>
<td>The part of the Buy@Duke system that contains Shopping Carts created with items from Hosted Catalogs and/or Suppliers’ Catalogs.</td>
</tr>
<tr>
<td>G/L Account:</td>
<td>Financial code that identifies the specific item being purchased.</td>
</tr>
<tr>
<td>Good Receipt:</td>
<td>Acknowledgement that an item or items that have been purchased have been received by the ordering department.</td>
</tr>
<tr>
<td>Hosted Catalog:</td>
<td>The part of the Buy@Duke system that contains products with Duke-negotiated pricing and descriptions. Hosted Catalogs are maintained by Duke’s Procurement Services to ensure best pricing.</td>
</tr>
<tr>
<td>Non-Catalog Items:</td>
<td>Items that are not contained in either Hosted Catalogs or Suppliers’ Catalogs. Descriptions and other information about the items must be entered into the Buy@Duke by the Shopper.</td>
</tr>
<tr>
<td><strong>Personal Values List:</strong></td>
<td>A list that contains information used frequently. The values that can be stored in the Personal Values List include: Cost Center, WBS Element, G/L Account, Material Group, and Supplier.</td>
</tr>
<tr>
<td>--------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Procurement Substitutes:</strong></td>
<td>See Team Members.</td>
</tr>
<tr>
<td><strong>Punch-Out Catalog:</strong></td>
<td>See Supplier's Catalog.</td>
</tr>
<tr>
<td><strong>Reasonableness:</strong></td>
<td>An expense that is necessary for the operation of the project. The cost paid for that good or service must be consistent with what a prudent person would pay for the same item.</td>
</tr>
<tr>
<td><strong>Shopper:</strong></td>
<td>A Buy@Duke user who initiates a Shopping Cart as the first step in a department’s work flow.</td>
</tr>
<tr>
<td><strong>Submitter:</strong></td>
<td>A Buy@Duke user who reviews, edits, and approves a Shopping Cart as the second step in a department’s work flow.</td>
</tr>
<tr>
<td><strong>Supplier’s Catalog:</strong></td>
<td>An electronic catalog maintained outside the Buy@Duke system. Supplier’s Catalogs maintain Duke-negotiated pricing and are accessible from Buy@Duke.</td>
</tr>
<tr>
<td><strong>Team Members:</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Text Items:</strong></td>
<td>See Non-Catalog Items.</td>
</tr>
<tr>
<td><strong>WBS Element</strong></td>
<td>Financial code that identifies a specific special project or grant. 3xx and 2xx codes.</td>
</tr>
</tbody>
</table>
Animal Ordering Process

1. The research lab obtains an approval protocol from the Institutional Animal Care and Use Committee (IACUC)

2. The research lab completes the “Request for Animal Housing” form if it doesn’t have approval housing space.


4. The ordering lab creates a text order cart in Buy@Duke, attaches the completed “Animal Order Request” form to the ordering cart, and submits the cart for processing.

5. Buy@Duke workflow electronically routes the cart to DLAR for approval.

6. DLAR reviews the cart. If DLAR staff members have questions about the request, they will route the cart back to the ordering lab for more information. Once DLAR staff members approve the cart, workflow electronically routes the cart to Procurement for processing. DLAR staff members print a copy of the “Animal Order Request” form for placing the order with the vendor.

7. Procurement staff members review the order for DLAR approval and then process the cart into a confirming purchase order to reflect the applicable delivery address in Buy@Duke (102416412) for orders shipping to the Vivarium or the Buy@Duke address (102416671) for orders shipping to the VA animal house. Procurement staff members print the hard copy of the purchase order so the order doesn’t fax to the vendor. DLAR staff members will obtain the purchase order number from Buy@Duke.

8. DLAR staff members place the order with the vendor. They have their own system, named Granite, in which they create an order to the vendor, print the order, and fax it to the vendor.

Note: All forms are found on the Division of Lab Animal Resources website: [http://www.labanimal.duke.edu/](http://www.labanimal.duke.edu/)

DLAR Contacts: Ted Powell, Arnette Williams, and Steve Pomeroy
Radioisotope Ordering Process

1. Begin by creating a Shopping Cart in Buy@Duke and populating it with radioactive items they wish to order. Follow these two important steps to ensure proper routing and avoid processing delays:
   a. Use ONLY G/L Account 649400 and Material Group 015.
   b. Order radioactive materials in a cart with no other items.

2. In the Supplier Text box found on the Details: Notes and Attachments tab, enter your Authorized User Name or ID, along with the authorized building and room number (e.g., “Smith LSRC C454” or “MC-999 LSRC C454”).

3. When the Cart is submitted, it will automatically route to OESO’s Radiation Safety Office for review and approval. Staff members may “inquire” (return) the Cart to the Submitter if they need more information or have questions.

4. After the Cart has been reviewed, Radiation Safety staff members will enter the order into OESO’s radioisotope website and approve the Cart in Buy@Duke. The Cart will automatically route to Procurement Services for review.

5. Procurement Services staff members will review the Cart for Radiation Safety’s approval and then process it into a Confirming Purchase Order, indicating the delivery address for orders shipping to the Radiation Safety Office.
   **Note:** Orders for the VA Hospital are placed with the vendor by the end users, who will coordinate the delivery of the radioactive materials through the VA Radiation Safety Office.

6. Once the Confirming Purchase Order has been created, the ordered items will be directed to the Radiation Safety office.

7. Radiation Safety staff members place the order with the Supplier and deliver the items to the lab using the standard process.

OESO Contact: Brian Gibbs
Select Agent Ordering Process

1. The ordering lab fills out an internal order form for Select Agents. The form is located on the OESO website: www.safety.duke.edu/BioSafety/selectagents.htm

2. The ordering lab submits the form to the OESO Biological Safety Office.

3. OESO staff members check to see if the requesting lab is qualified to order select agents.

4. OESO staff members enter the order electronically in Buy@Duke, using the lab’s Cost Object, to create a Purchase Order. In the Internal Note field of the Shopping Cart, they enter “Select Agent.” The order is not faxed to the supplier.

5. Procurement Services staff members print the Purchase Order.

6. Procurement Services staff members e-mail the Purchase Order number to the OESO office.

7. The Purchase Order number is added to the Select Agent order form and faxed to the Supplier.

8. The Supplier ships the Select Agent to the Biological Safety Office at Hock Plaza 1.

9. The Biological Safety Office delivers the Select Agent to the ordering lab.

OESO Contact: Christina Kelly