Sm@rtBuy Training Manual

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INTRODUCTION

Sm@rtBuy is York's on-line procurement system that streamlines purchasing at York, allowing for significant time savings for everyone currently involved in purchasing routine items. This training manual provides instruction on how to use Sm@rtBuy.

Accessing Sm@rtBuy

To access Sm@rtBuy users are required to authenticate through Passport York.

URL: <u>https://loginxml.apps06.yorku.ca</u> or click on the Sm@rtBuy link provided on York's Faculty & Staff homepage at <u>http://www.yorku.ca/yorkweb/fs.htm</u>

Upon successful authentication the Sm@rtBuy homepage **[Diagram 1]** will appear. The homepage is user friendly and easy to navigate.

USER PROFILE

- **A** Home Link to the Homepage
- **B** Shop Shopping, My Carts and Orders
- **C** Orders Document search and approvals
- **D** Contracts
- E Accounts Payable
- **F** User Icon Access to own Profile,
- **G** Action Items My Assigned Approvals, Carts Assigned to Me, Invoice to Approve
- **H** Notifications
- I My Cart Access to active cart
- **J** Welcome Notifications/messages from Procurement Services.
- **K** Shopping Categories list of available suppliers by category

Α	â	YORK U Sm@rtBuy		All 🕶	Search (Alt+Q)	0.00 CAD 💘	
В	1	Simple Advanced		Go to: Favourites	Forms Quick Order	Browse: Suppliers 0	G H F Categories Contracts
С	6	Search for products, suppliers, forms, part number, etc.					Q
D	9						Logout
E	11 梁 山	Welcome to Sm@rtBuy Sm@rtBuy is York's electronic procurement system, designed to improve purchasing processes and reduce costI Sm@rtBuy is your online "one-stop shop" to purchase and pay for anything you need, from office supplies to scientific equipment. Users may experience fluctuation of pricing and discontinuation of products	Apparel Contact YU Bookstore				v
	\$	Inclusion of pricing and discontinuation of products between the time that goods are ordered and invoiced. NEW USER EXPERIENCE Sm@rtBuy is moving to a new user experience (UX) on November 15, 2021. The new shopping experience is a redesign of the catalogue and non-catalogue shopping pages in Sm@rtBuy. The updated training manual will be available shortly. Thank you.	Computer Equipment/Supplies	Shipg offcampus	Dell.	T Requisitoner Instructions for	~~~~
		catalogue and non-catalogue shopping pages in Sm®rtBuy. The updated training manual will be available shortly.		Shipʻg offcampus <\$100			

[Diagram 1]

Updating Profile

Each user has a unique profile. If any information is incorrect or changes are required they can only be made through the HR Self-Serve system.

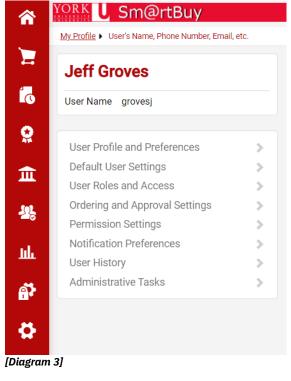
To access your Profile, from the Sm@rtBuy homepage, select the dropdown menu beside your user name and select **View My Profile**. [Diagram 2]

YORK U Sm@rtBuy		All 👻	Search (Alt+Q)	0.00 CAD	₩ ©	~	
Simple Advanced		Go to: Favourite	Jeff Groves				
Search for products, suppliers, forms, part number, etc.		\$	View My Profile Dashboards				
			Manage Searches Manage Search Exports Search Help For A Solution				
Welcome to Sur OxfDury	Apparel		You do	not have any rece	nt orders		
Welcome to Sm@rtBuy Sm@rtBuy is York's electronic procurement syst designed to improve purchasing processes and	reduce				Logout	н	lelp
costs! Sm@rtBuy is your online "one-stop shop" purchase and pay for anything you need, from o	office Contact YU Bookstore						

[Diagram 2]

On the My Profile page the following options are displayed [Diagram 3]:

- User Profile and Preferences
- Default User Settings
- User Roles and Access
- Ordering and Approval Settings
- Permission Settings
- Notification Preferences
- User History



User Profile and Preferences

User's Name, Phone Number, Email, etc.

The User's Name, Phone Number, Email, etc, link is read-only except for the Email Approval Code, which is only visible to Approvers. A minimum of a four digit number is required in this field in order for Approvers to action on a requisition remotely. Enter digits in the Email Approval Code box and click **Save.** [Diagram 4]

â	YORK U Sm@rtBuy				All 👻	Search (Alt+Q)	۹	0.00 CAD	Ä	♡ ■	* 1
_	My Profile 🕨 User's Name, Phone Number, Emai	l, etc.									4) Logout
Ξ	Jeff Groves		User's Name, Phone	e Number, Email, etc.				1	2		
í0	User Name grovesj		First Name	Jeff							
8	User Profile and Preferences	<	Last Name	Groves							
Â	User's Name, Phone Number, Email, Language, Time Zone and Display Se		Phone Number Mobile Phone Number								
-12	Early Access Participation			International phone numbers must begin with +							
-0	Default User Settings	>	E-mail Address *	-							
11h	User Roles and Access	>									
	Ordering and Approval Settings	>	Department	-							
A 7	Permission Settings	>	IT Support Group	~							
	Notification Preferences	>									
4	User History	>	Authentication Method	LoginXML 🗸							
	Administrative Tasks	>	User Name *	grovesj							
			★ Required					Save Changes			

[Diagram 4]

Custom Field and Accounting Code Defaults

To set up default Accounting Codes, on the My Profile homepage select *Custom Field and Accounting Codes Defaults* under *Default User Settings* selection menu.

Jeff Groves		Custom Field and Acco	ounting Code Def	aults	
Jser Name grovesj		Codes Code Favourites Syst	em Administration Use	Only	
					?
User Profile and Preferences	>	Custom Field Name	Default Value	Description	Edit Values
	· · · ·	Fund	No Defau	It Value	Edit
Default User Settings	< 	L Cost Centre	No Defau	It Value	Edit
Custom Field and Accounting Code I	Jeraults	Activity	No Defau	It Value	Edit
Default Addresses		Location	No Defau	It Value	Edit
Cart Assignees User Roles and Access	>	Time	No Defau	It Value	Edit
Ordering and Approval Settings	Ś				
Permission Settings	>				
Notification Preferences	>				
User History	>				
Administrative Tasks					



Step 2. Click the **Add** button to set up a combination of values to be used for checkout. *[Diagram 6]*

My Profile Custom Field and Accounting Code Defaults

Jeff Groves		Custo	m Field a	nd Accountin	g Code Defa	ults	
User Name grovesj		Codes	Code Favou	rites System Adn	ninistration Use O	nly	
User Profile and Preferences	>			for quick access to a			
Default User Settings	<	used o	ombination of a	accounting codes wi	th or without splits.	Code Favourites an	
Custom Field and Accounting Code	Defaults	checko profile		e codes section or b	by selecting it as yo	ur default accountin	g codes in your
Default Addresses			_				
Cart Assignees		Add	J				
User Roles and Access	>	Fund	/ Cost Cent	re			?
Ordering and Approval Settings	>						
Permission Settings	>		Fund	Cost Centre	Activity	Time	Location
Notification Preferences	>		no value	no value	no value	no value	no value
User History	>		no value	novalac	no value	no value	no value
Administrative Tasks	>	~ C	ode Favorit	es for Check Re	equests & Invo	ices	
					4		
		Add	T.				
		Fund	J / Cost Cent	TA			?
			Fund	Cost Centre	Activity	Time	Location
			i unu	ooot oentre	riourity	ie	Location

[Diagram 6]

Step 3. A pop-up window then displays. [*Diagram 7*]

ustom rielu a	nd Accountin	y code pera	uns			?	
des Code Favou	rites System Adm	inistration Use O	nly				
				?			
heckout. You may cr sed combination of a	for quick access to a reate a new Code Fav accounting codes wit ne codes section or b	ourite by clicking th th or without splits.	e "Add" button and Code Favourites a	d entering a commonly are accessed during			
Fund / Cost Cent	tre						?)
Nickname		De	fault				
Fund	d	Cost Cent	re	Activity	Time	Location	ado
Select from a	Il values			Select from all values	Select from all values	Select from all values	
				Save Cancel			
_							_
Add							
Fund / Cost Cent	tre			?			
		Activity	Time	Location			
Fund	Cost Centre	Houvity					

[Diagram 7]

- **Step 4.** Enter the nickname for the account code favourite. This should be a recognizable name that describes the use of the cost centre information you are about to create. (For example: Shopper1 Codes, Office Supplies, PER Grant). If creating more than one code favourite you need to add a different nickname for each one.
- Step 5. Indicate by the Default checkbox if this is your "standard" accounting code string that you would like defaulted in your Profile. Note: If you have more than one code favourite, only one can be defaulted.
- Step 6. To select the Fund click on the Select from all values... link and from the dropdown box choose from the available funds. Repeat this step for each accounting code. [Diagram 8]

ustom Field	and Accounting	J Code Defa	ults				?	
odes Code Fav	ourites System Admi	nistration Use O	nly		2			
checkout. You may used combination	es for quick access to ac create a new Code Favo of accounting codes with g the codes section or by	ourite by clicking the or without splits.	he "Add" button and e . Code Favourites are	entering a commonly accessed during				
Fund / Cost Ce	entre							? X
Nickname		De	efault					
	Fund	C	Cost Centre	4	ctivity	Time	Location	add split
Hi	de all values	~		Select fr	om all values	Select from all values	Select from all values	
	g Fund Services y Sponsored Research			Save	Cancel			
500 - External 600 - Trust & E 700 - Capital F				?				
· · ·			Time	Location				
Fund	Cost Centre	Activity	Time	Location				

[Diagram 8]

Step 7. Click the **Save** button.

To delete an accounting code set, click the **Delete** button. To edit an accounting code set, click the **Edit** button and make any necessary changes. **[Diagram 9]**

Custom Field and Accounting Code Defaults

oues	Code Favor	urites System Adm	inistration Use O	nly	
hecko sed c	out. You may c ombination of out by editing 1	o for quick access to ac reate a new Code Favo f accounting codes wit the codes section or by	ourite by clicking th h or without splits.	ne "Add" button and Code Favourites are	entering a common e accessed during
Func	」 I / Cost Cer e Supplies	ntre		(Edit Delete
Func		ntre Cost Centre	Activity	T ime	Edit Delete

[Diagram 9]

Default Addresses – Ship To and Bill To

The shipping address identifies where the supplier should ship the item(s).

Step 1. On the My Profile homepage select **Default Addresses** under **User Information and Settings** menu. [*Diagram 10*]

	Jeff Groves	
	User Name grovesj	
	User Profile and Preferences	>
	Default User Settings	<
	Custom Field and Accounting Code	Defaults
\geq	Default Addresses	
	Cart Assignees	
[[

Step 2. To add an address (typically the user's default address) press the Select Addresses for Profile button.[Diagram 11]

Jeff Groves		Default Addresses
User Name grovesj		No addresses defined in profile.
User Profile and Preferences	>	Ship To Bill To
Default User Settings	<	Select an address to edit
Custom Field and Accounting Code D	efaults	Select Addresses
Default Addresses		Solution of the second
Cart Assignees		Shipping Addresses
User Roles and Access	>	^
Ordering and Approval Settings	>	
Permission Settings	>	
Notification Preferences	>	
User History	>	
Administrative Tasks	>	

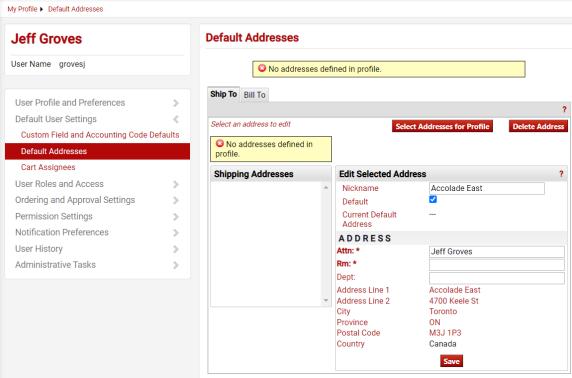
[Diagram 11]

- **Step 3.** To select an address using the search interface, use the following steps:
 - a. Type the building name in the **Building Name** field. Please do not search using acronyms (e.g. ACE).
 - b. Determine the desired number of results for display by selecting a number from the **Results per Page** drop-down box.
 - c. Click the **Search** button. See [Diagram 12]

Jeff Groves		Default Addresses		
User Name grovesj		S No addresses de	fined in profile.	
User Profile and Preferences	>	Ship To Bill To		
Default User Settings	<	Select an address to edit		
Custom Field and Accounting Code	Defaults		Select Addresses for	Profile
Default Addresses		ONO addresses defined in pro	ile.	
Cart Assignees		Shipping Addresses	Address Search	
User Roles and Access	>		Building Name accolade	
Ordering and Approval Settings	>		Results Per Page 10 V	
Permission Settings	>		Search	
Notification Preferences	>		Addresses Found: 2 Addresses Found: 2	of 1 [
User History	>		Name Address	
Administrative Tasks	>		 Accolade East Attn: Jeff Groves Rm: Dept: Accolade East 4700 Keele St Toronto, ON M3J 1P3 Canada 	
			 ○ Accolade West Attn: Jeff Groves Rm: Dept: Accolade West 4700 Keele St Toronto, ON M3J 1P3 Canada 	

[Diagram 12]

- **Step 4.** Select the radio button adjacent to the address desired for the current user ID.
- **Step 5.** Edit the **Nickname** and select the **Default** checkbox if this address is the desired default **Ship To** address.
- Step 6. Review the information and make any necessary changes. This includes entering freeform text such as Attn., Room Number and Department.
- **Step 7.** Press the **Save** button to save changes. The selected address displays in the **Shipping Addresses** list box. *[Diagram 13]*
- **Step 8.** Press the **Delete** button to remove an address if the address was selected in error or if it is no longer needed. *[Diagram 13]*
- **Step 9.** Repeat the steps above to add any additional shipping addresses to the profile.



[Diagram 13]

Address Bill To - The billing address identifies where the supplier should send the invoice. This address has been defaulted to Accounts Payable and cannot be changed.

Language, Time Zone and Display Settings

You can set the following preferences from the Language, Time Zone and Display Setting link: *Diagram 14]*

- Language:This field determines the language displayed on the screen.English and French are the two available options.
- **Country:** Only Canada can be selected.
- **Currency:** Select CAD.
- **Time Zone:** Set to EDT/EST Eastern Standard Time.
- **Color Theme:** Set to **York**
- Enable Accessibility Mode: This field should be enabled for those users who would like to use the application via a screen reading. Enabling this field will turn on field labels, noted as question marks. It will also enable a skip navigation link. This allows screen readers the ease of navigating to the content pane versus individual tabs.

Help on mouse over: This field determines whether or not field-specific help displays when "hovering" on a field in Sm@rtBuy. By default this setting is on.

Preferred e-mail format: Leave this blank; this is to be set by system administrators only.

My Profile Language, Time Zone and Display				
Jeff Groves		Language, Time Zone and Display S	Settings	?
User Name grovesj		Select a Language		
User Profile and Preferences User's Name. Phone Number, Email.	<	Country		
Language, Time Zone and Display Se		Currency		
Early Access Participation		Time Zone	~	
Default User Settings User Roles and Access	>	Color Theme	~	
Ordering and Approval Settings	>	Preferred email format	~	
Permission Settings Notification Preferences	>	Access Training Content Configuration	🔾 Yes 💿 No	
User History	>	Accessibility		
Administrative Tasks	>	Enable Accessibility Mode 🔿 Yes 💿 No		
		Help on mouse over 😧	~	
		Enable Limited Animation O Yes 💿 No		
				Save Changes

[Diagram 14]

Notification Preferences

The Notification Preferences screen **[Diagram 15]** is used to notify users when specific events happen in the system or an issue is pending that requires the user's attention. Notifications for specific users are managed through the Notification Preferences menu in the user profile. This includes configuring which notifications the user will receive and the method of delivery (in application, email, or both). Often, this information is inherited from a role but it can be overridden at the user level. If a notification preference is not inherited, it will default to None.

- Step 1. From the User Information Settings menu; select the Notification
 Preferences sub-link. Note: The notification options listed are dependent on a user's permissions.
- Step 2. Select a sub-menu to choose a specific notification preference. For example, the Administration & Integration, then locate and click the Edit Section on the screen
- **Step 3.** Radio button options will display to the right of the notification. To override the default status for the notification, click the Override radio button. If a status has been overridden and you would like to restore the default, click the Default radio button.
 - Email indicates that the user receives the notification by email.

- Notification indicates that the user receives the notification in the application. **Important Note**: In-application notifications are not available for all notifications. For those items, the Notification status option will not be available.
- Email & Notification indicates that the user receives the notification in both ways.
- None indicates that the user does not receive this notification.

Step 4. When you have completed the changes, click Save.

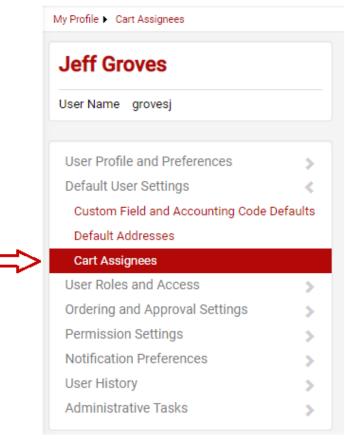
Jeff Groves	Notification Preferences:	Administration & Integration	Edit Section ?
User Name grovesj			
	Prepared By - PO Distribution Fail	lure Notice None	
User Profile and Preferences >	User Registration pending approv	val O None	
Default User Settings > User Roles and Access >	Search Result Export Confirmatio	Email & Notification	
Ordering and Approval Settings	PR Workflow Step error notice 🛛	Email & Notification	
Permission Settings	PR Export Failure Notification 🔮	Email & Notification	
Notification Preferences <	PO Workflow Step error notice	Email & Notification	
Shopping, Carts & Requisitions	PO Distribution Failure Notice 🥹	Email & Notification	
Notification Preferences: Adminis	tration & Integration		?
Prepared By - PO Distribution Failure Notice	Default 💽 Overri	None	
User Registration pending approval 🤮	Overright Overright	ide Email Notification	
Search Result Export Confirmation 😧	Default Overri	ide Email & Notification	
PR Workflow Step error notice 😧	Default Overri	ide Email & Notification	
PR Export Failure Notification 0	● Default 🛛 Overri	ide Email & Notification	
PO Workflow Step error notice 😧	● Default 🛛 Overri	ide Email & Notification	
PO Distribution Failure Notice 🤤	● Default 🛛 Overri	ide Email & Notification	
PO Export failure notification 🕄	● Default 🛛 Overri	ide None	
Invoice Export failure notification 😧	● Default 🛛 Overri	ide Email & Notification	
Contract Item XML Import Failure Notice 🥹	Default Overri	ide None	
Contract Item XML Import Warning Notice 🥹	Default Overri	ide None	
Supplier XML Import Failure Notice 🕄	Default Overri	ide None	
Supplier XML Import Warning Notice 🕄	Default Overri	ide None	
Supplier Export Failure Notice 😧	● Default 🛛 Overri	ide None	
Real Time Supplier Export Failure Notice 🧕	● Default 🛛 Overri	ide None	
Receipt Export failure notification 🤤	● Default 🛛 Overri	ide None	
User Export Failure Notice 😧	● Default ○ Overri	ide None	
		Save Cha	anges Cancel

[Diagram 15]

Cart Assignee

Users who only have the Shopper role can set up a default cart assignee. The preferred assignee is another individual who can submit and process the cart, also known as the Requisitioner.

Step 1. Navigate to View My Profile, click on the Default User Settings and select Cart Assignees. [Diagram 16] Any previously selected assignees are listed.



[Diagram 16]

Step 2. To add a user as a cart assignee, click the Add Assignee button. [Diagram 17]

leff Groves		Cart Assignees	
Jser Name grovesj	(Add Assignee	
		My Cart Assignees	?
User Profile and Preferences	>	Name	Action
Default User Settings	< L		
Custom Field and Accounting Code	Defaults		
Default Addresses			
Cart Assignees			

- *Step 3.* From the **User Search** pop-up window, enter the last name to locate the cart assignee
- *Step 4.* Click **Search**. *[Diagram 18]* Note: You do not need to fill out all fields in the **User Search** dialogue.

User Search - Google Chr	ome			\times
solutions.sciquest.cc	m/apps/Router/GenericUserSearch?Tmstmp=1637090817971696&returnFunctior	n=setUs	serFro	Q
User Search				?
Last Name 😧	[
First Name 😧				
User Name 😧				
Email 😧				
Department 😧	~			
Position 8	~			
Role 😧	~			
Results Per Page	10 🗸			
Search				
[Diagram 18]				

Step 5. The search results display only users that meet the requested criteria and are set up to submit carts. Locate the user from the list, and click the Select link from the Action column. [Diagram 19]

🤳 User Search - Google Chrome	3			-	
solutions.sciquest.com/	apps/Router/GenericUserSe	earch?returnFunction=set	UserFromPopupSea	rch&permissi	ions= Q
New Search					
Name 🔺	User Name 🗠	Email 🗠	Phone	Action	
Groves, Jeff	grovesj				[select]
[Diagram 19]					

Step 6. From the assignee list, click the **Set as Preferred** button to make the user the default Requisitioner for your orders. *[Diagram 20]*

Cart Assignees

Add Assignee	
My Cart Assignees	?
Name	Action
Jeff Groves	Set as Preferred Remove

[Diagram 20]

Repeat steps above to add additional cart assignees to your list.

To remove a Requisitioner as the preferred (i.e. default) Requisitioner, simply click the **Remove** button to the right of the Requisitioner's name. **[Diagram 21]**

My Cart Assignees ? My Cart Assignees ? Name Action Jeff Groves (Preferred Assignee) Remove

[Diagram 21]

User Access and Security

Assigned Roles

Provides a read-only list of the role(s) assigned to the user. Roles can only be changed by the eProcurement Administrators. *[Diagram 22]*

			All 👻	Search (Alt+Q)	Q 0.0	CAD 📜
rofile 🕨 Assigned Roles						
Jeff Shopper		Assigned Roles				?
User Name JeffShopper		Assigned Roles Shopper				
User Profile and Preferences	>					
Update Security Settings	>					
Default User Settings	>					
User Roles and Access	<					
Assigned Roles						
Access						
Fulfillment Center Access						
Ordering and Approval Settings	>					
Permission Settings	>					
Notification Preferences	>					
User History	>					
Administrative Tasks	>					

Access

The Document Search Access screen grants search access to documents. By default all users will have access to document search.

Permission Settings

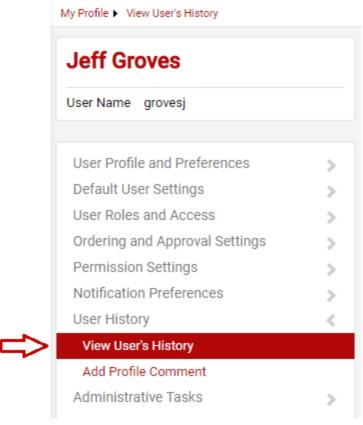
Permissions are set by the eProcurement Administrators.

User History

The **View User's History** link provides an audit trail that tracks changes made to a user's profile. This is an information-only screen that provides detailed information about potentially important changes such as changes to roles and permissions, Approvers, addresses and more. The History screens are used to track changes, additions and deletions.

To view all changes, additions and deletions related to a user's profile.

Step 1. Navigate to the **View My Profile** screen, click **User History** and select **View User's History**. *[Diagram 23]*



[Diagram 23]

Review the user profile history. The columns in the history table are described below **[Diagram 24]:**

- The date and time a change was saved. Date: User: The user who made the change. Action: The type of action the user took. Typically, either creating or modifying information for the user. Section: The section of the user profile in which the changes took place. Selection: The area or value added. This field is not always applicable to a change. Field: The specific field the user modified. This field is not always applicable to a change. The value prior to the change. This field is not always Old Value: applicable to a change.
- **New Value:** The value saved by the change. This field is not always applicable to a change.

View User's History	View	User's I	History
---------------------	------	----------	---------

	filter histo	_			-					Export CS
Results Per F	age 20	~			Recor	ds Fo	und: 31		🖪 Page 1 🗸	
Date 🔻	User 4	2	Action		Section		Selection	Field	Old Value	New Value
16/11/2021 2:36:35 PM	Jeff Groves	Mo	odified		Cart Assignees			Preferred Assignee	empty	Jeff Groves
16/11/2021 2:35:20 PM	Jeff Groves	As	signee Added		Cart Assignees		Jeff Groves			
16/11/2021 2:26:57 PM	Jeff Groves	As	signee Removed		Cart Assignees		Jeff Groves			
16/11/2021 12:51:47 PM	Jeff Groves	Co	de Favourite Remove	d	Code Favourites		Nickname : Office Supplies	Fund	200	empty
16/11/2021 12:51:47 PM	Jeff Groves	Co	de Favourite Remove	d	Code Favourites		Nickname : Office Supplies	AVP or Dean	empty	empty
16/11/2021 12:51:47 PM	Jeff Groves	Co	de Favourite Remove	d	Code Favourites		Nickname : Office Supplies	Research Cost Centre	empty	empty
16/11/2021 12:51:47 PM	Jeff Groves	Co	de Favourite Remove	d	Code Favourites		Nickname : Office Supplies	VP Designate	empty	empty
16/11/2021 12:51:47 PM	Jeff Groves	Co	de Favourite Remove	d	Code Favourites		Nickname : Office Supplies	Time	empty	empty
16/11/2021 12:51:47 PM	Jeff Groves	Co	de Favourite Remove	d	Code Favourites		Nickname : Office Supplies	Activity	empty	empty
16/11/2021 12:51:47 PM	Jeff Groves	Со	de Favourite Remove	d	Code Favourites		Nickname : Office Supplies	Director or EO	empty	empty
16/11/2021 12:51:47 PM	Jeff Groves	Co	de Favourite Remove	d	Code Favourites		Nickname : Office Supplies	Location	empty	empty
16/11/2021 12:51:47 PM	Jeff Groves	Со	de Favourite Remove	d	Code Favourites		Nickname : Office Supplies	Cost Centre	233000	empty
16/11/2021 11:57:05 AM	Jeff Groves		sign Cart Substitute moved						Elli Abaei	empty

[Diagram 24]

The History tab provides the ability to filter the audit trail based on certain criteria. To filter the data displayed in the table: Click the + sign at the top of the screen

🗄 Click to filter history

Enter the appropriate filter criteria to determine what historical data displays, then click **Apply**. The historical data updates immediately. **[Diagram 25]**

?

View User's History

Filters			1
Start Date			
	dd/mm/yyyy		
End Date			
	dd/mm/yyyy		
Action			~
Section			~

[Diagram 25]

SHOPPER



The Shopper role allows users to find items and create shopping cart(s), access catalogues and use forms to procure non-catalogue and specialty items. The cart is then assigned to a Requisitioner for processing and submission.

Items can be added to the cart through many of the screens in Sm@rtBuy. Listed below are the different places where products can be found from the homepage as shown **[Diagram 26]:**

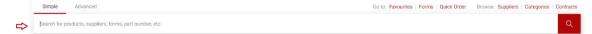
- A Simple Search
- B Advanced Search
- **C** Favourites
- D Forms
- **E** Click on the Supplier Logo

	1.1	0	-
i 🏫 🔛	RK U Sm@rtBuy	All Orders 👻 Search (Alt+Q) 0.00 CAD 📜 💙 🏴	, e
	В	C D	
	Simple Advanced	Go to: Favourites Forms Quick Order Browse: Suppliers Categories Con	ntracts
-	Search for products, suppliers, forms, part number, etc.		Q
6			
9			oqout
			5
血			
	Welcome to Sm@rtBuy	Apparel	• •
뵳	Sm@rtBuy is York's electronic procurement system, designed to improve purchasing processes and reduce		
Jul.	costs! Sm@rtBuy is your online "one-stop shop" to	Contract VI Bookstore	
	purchase and pay for anything you need, from office supplies to scientific equipment. Users may experience	Contact to Bookstore	
6 7	fluctuation of pricing and discontinuation of products		_
	between the time that goods are ordered and invoiced.	Computer Equipment/Supplies	• 🗸
- C	NEW USER EXPERIENCE Sm@rtBuy is moving to a new user experience (UX) on November		
	15, 2021. The new shopping experience is a redesign of the	ANIXIER (S10 Ship's offcampus DXLL IT Requisitoner Instructions for	
	catalogue and non-catalogue shopping pages in Sm@rtBuy. The updated training manual will be available shortly.	<\$100	
	Thank you.		

[Diagram 26]

Simple Search

From the homepage enter the product you are searching for into the search field. Then click the **Magnifying Glass** to button. This will generate a list of items matching your keywords. **[Diagram 27]**



[Diagram 27]

Advanced Search

From the homepage click the **Advanced Search** link. The following search fields are available: **[Diagram 28]**

- Keywords
- Supplier
- Part number (SKU)
- Manufacturer Name

- Commodity Code
- Other Options (e.g. exact phrases or word search)

Enter the criteria and click the **Search** button.

Simple Advance	d		Go to: Favourites Forms	Quick Order Brow	se: Suppliers Ca	tegories	Contracts
Advanced Search	Everything						
Find Results That Have	2:						0
All of These Words	1	Supplier					
Part Number (SKU)		Manufacturer Name					
Commodity Code	Q						
Other Options							0
Exact Phrase		Exclude Words					
Any of These Words							
					Search	Re	set

[Diagram 28]

Add Items to Favorites and How to Access Favourites

Step 1. Search for an item and then click on the **Heart Icon** \heartsuit to add favorite **[Diagram 29]**

	Simple Advanc			-		Go to: Favo	arites Forms Quick Order Brows	e: Suppliers Categories Contracts
	Advanced Search	Everything	•					
	Find Results That Hav	ve:						0
⇔	All of These Words	acid			Supplier			
	Part Number (SKU)				Manufacturer Name			
	Commodity Code		٩					
	Other Options							
	Exact Phrase				Exclude Words			
	Any of These Words							
								Search Reset
T Hide								OCULUI MEDEL
Search Resu	ults: 4000+						Logout Compare	BEST MATCH - 🕹 🗎
By Product	Flag	~) 🛛	♡	Ø	♡	
	ardous material		THE REG		u	ື ຫ	u	u
By Supplier	lidrich Canada Co.	~	States in the local division of the local di	The second second				
Life Tech	hnologies Inc.		Each-Orion Acid Buffer for Nitrogen Oxide Electrode, 475mL from Life Technologies Inc.	Each-Orion Acid Reagent for Residual Chlorine Electrode, 475mL from Life Technologies Inc.	(R)-2-Methyl-3-ureldopropionic acid from Sigma-Aldrich Canada Co.	(R)-2-Methyl-3-uneidopropionic acid from Sigma-Aldrich Canada Co.	ACETIC ACID (GLACIAL) 100% EMPROVE(R) ESSENTIAL PH EUR BP JP USP E 260	ACETIC ACID (GLACIAL) 100% SUITABLE FOR USE AS EXCIPIENT EMPROVE(R) EXP PH EUR BP JP USP E

[Diagram 29]

Step 2. Create a Destination Folder by clicking on the Create New and select Top Level Personal Folder, then name the folder and save. If you have previously created a destination folder and wish to add this item to it, then simply select the existing Destination Folder. [Diagram 30]

Add Favorite		×	Quick Order
Edit Item Details			
Sigma-Aldrich Canada Co., Catalogue I	No. C1909-25G		
Item Nickname 🖈	Each-Orion Acid Buffer for Nitrogen Oxide Electr		
Quantity 🖈	1	_	C u
Description			
Description		Top level persor	
		Top level shared	a folder
	500 characters remaining	Subfolder of se	lected folder
Select Destination Folder	⇔	Create New 💌	la Co.
Personal		*	
You have no personal favorites			r
Shared		~	
furtest			<
Sm@rtBuy Forms			- U
★ Required	Save C	hanges Close	

[Diagram 30]

Step 3. Click Save Changes.

Step 4.Go to the **Favourites** *[Diagram 31]* (which you can access from the link below the **Shop Everything** product search bar or simply select the Shopping Cart icon and then click on **View Favourites**).

Simple Advanced	Go to: Favorites Forms Quick Order Browse: Suppliers Categories	Contracts
Search for products, suppliers, forms, part number, etc.		Q
Shop + Shopping + View Favorites		
Favorites ?	Manage Favorites	?
Q Search Add New ▼ Expand All Collapse All Y Personal Test Y Shared furtest Sm@rtBuy Forms	Click Add New to begin creating a folder or select a folder to view the contents.	

[Diagram 31]

Step 5.Locate and select the appropriate personal folder where the item resides.

Step 6. From the right side of the pane, locate the item, update the defaulted quantity if needed, and click **Add to Cart**.

Add Items to a Cart

- **Step 1.** On the **Home/Shop** screen a list of available suppliers is displayed.
- **Step 2.** Select the logo or name of the supplier.
- **Step 3.** A search box will be available for certain supplier catalogues. Type in the product name or number and click **Search**.
- Step 4. For certain supplier catalogues, Sm@rtbuy redirects to the suppliers' web site. Search for products and add products to the cart in the suppliers' website. This checkout process varies from supplier to supplier. Use the suppliers' mechanism to complete the order process and return to Sm@rtbuy.
- Step 5. Upon returning to Sm@rtbuy the user will be on the Shopping Cart page. The user can either click on Assign Cart or Proceed to Checkout to complete the address and account code details.

For certain suppliers a form will open. Populate the form. Select Add and go to Cart from the available drop-down menu at the top right corner of the form, then click **Go**.

Using the Non-Catalogue Form

This form is used to purchase more than one item at a time. See Instructions to the left on the Form. To add additional lines to your Requisition, select Add to Cart and Return option from the Available Actions drop down menu at the top right corner of the form.

Step 1. From the Home Page, under the Forms category, choose Non-Catalogue Form [Diagram 32]

Forms		
Change Order Request DO NOT USE	New Supplier Request DO NOT USE	Non-Catalogue Form

[Diagram 32]

- **Step 2.** Populate the form.
- **Step 3.** Select **Add and go to Cart** from the Available Actions drop down menu at the top right corner of the form.
- Step 4. Click Go.

Searching Items from Product Comparison

The product comparison functionality is available for most Catalogues.

Step 1.	From the Search results click on the Inverted Arrows	🖓 Icon under
	the Add Favorite Icon. [Diagram 33]	

T Hide					× Q
earch Results: 100				Com	BEST MATCH 👻 😫
By Supplier	~				
Mandel Scientific Co. Inc. (31)		5	U	U	• (1)
BIO-RAD Laboratories (Canada) Ltd. (26)					
Diamed Lab Supplies (26)					
FroggaBio Inc. (7)		Aluminum Test Tube Basket 6 x 6 x 6 from Mandel Scientific Co. Inc.	Aluminum Test Tube Basket 10 x 6 x 6 from Mandel Scientific Co. Inc.	Aluminum Test Tube Basket 12 7/8 x 9 x 7 from Mandel Scientific Co. Inc.	Test Tube rack for 41 x 15 ml tubes from Mandel Scientific Co. Inc.
Sarstedt Inc. (5)		Part Number HW-HS20341A	Part Number HW-HS20341B	Part Number HW-HS20341C	Part Number BEN-B2000-4-T150
		31.20 CAD	35.20 CAD	45.60 CAD	88.80 CAL
By Category Test Tubes (21)	~	1 Add To Cart 🔻	1 Add To Cart 🝷	1 Add To Cart 💌	1 Add To Cart

[Diagram 33]

Step 2. Once you have selected at least 2 items for comparison, the Compare button will become active. Clicking the Compare will give you a side by side comparison of the product details for each item. [Diagram 34 & 35]

Y Hide test tubes						×	Q
earch Results: 100					2 Compare	BEST MATCH 👻 🖏	=
By Supplier Mandel Scientific Co. Inc. (31)	~	● (t)	1	♥ (h)	୍ଦ ୟ	•	© €
BIO-RAD Laboratories (Canada) Ltd. (26)							
Diamed Lab Supplies (26) FroggaBio Inc. (7)		Aluminum Test Tube Basket 6 x 6 x 6 from Mandel Scientific Co. Inc.	Aluminum Test Tube Basket 10 x 6 x 6 from Mandel Scientific Co. Inc.	Aluminum Test Tube Basket 12 7, from Mandel Scientific Co. Inc.		est Tube rack for 41 x 15 ml tubes om Mandel Scientific Co. Inc.	
Sarstedt Inc. (5) Show all		Part Number HW-HS20341A 31.20 CAD	Part Number HW-HS20341B 35.20	Part Number HW-HS20341C		art Number EN-B2000-4-T150 88.80	CAI
By Category Test Tubes (21)	~	1 Add To Cart	1 Add To Cart		o Cart	1 Add To Car	

Compare 2 Items		×
		ACTIONS FOR 0 SELECTED ITEMS *
Add to Cart	1 Add To Cart	Add To Cart
Product Image		
Product Details	Aluminum Test Tube Basket 6 x 6 x 6	Aluminum Test Tube Basket 10 x 6 x 6
Catalogue No.	HW-HS20341A	HW-H520341B
Price	31.20 CAD	35.20 CAD
Supplier	Mandel Scientific Co. Inc.	Mandel Scientific Co. Inc.
Category	Miscellaneous hardware	Miscellaneous hardware
UOM		
Price per UOM	31.20 CAD / unit	25.20 CAD / unit
Product Size		
Price per Product Size Unit		
Category UNSPSC	21-16-28-00	21-16-28-00
Color		
Manufacturer Name	HEATHROW	HEATHROW
Packaging UOM	EA	EA
Product Size		
UNSPSC	31-16-28-00	31-16-28-00

[Diagram 35]

Step 3. To add items from comparison page simply:

a. Click the Add to Cart button for a single item. OR

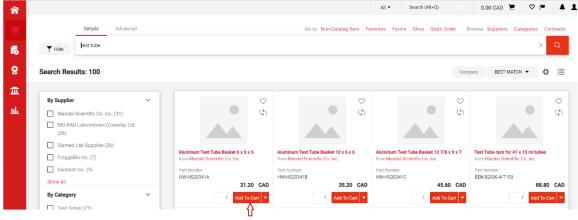
b. Place a check in the desired items' Select checkboxes and choose
 Add to Active Cart in the dropdown menu then click Go [Diagram 26]

30] ompare 2 Items		
		ACTIONS FOR 0 SELECTED ITEMS. +
		\Box ×
tid to Cart	1 Add To Cart	1 Add To Cart
Yroduct Image		•
roduct Details	Aluminum Test Tube Basket 6 x 6 x 6	Aluminum Test Tube Basket 10 x 6 x 6

[Diagram 36]

To Add Items to a Cart

- **Step 1.** Search for products using any of the search tools mentioned in this handbook. Search results display at the bottom of the screen.
- Step 2. Click on the Product Name to open its Product Details.
- Step 3. Set the desired quantity and choose Add to Active Cart in the dropdown menu, then click **Go**. [Diagram 37]
- Step 4. You can access the cart by clicking on the Shopping Cart icon at the top right corner of the screen, then select View My Cart.



[Diagram 37]

Adding and Removing Items from a Cart

The following actions can be taken on an active cart: [Diagram 38]

Update the item quantity Α В Remove an item from a cart С Remove all items from a cart D Proceed to Checkout / Assign Cart â Search (Alt+Q) 228.26 CAD 📜 🛇 🏴 Shopping Cart • 3406178 • - -Assign Cart D Empty Cart C 6 Simple Advanced Create New Cart Details View Carts Q Search for products, suppliers, for Jeff Shoppe View Cart history - -3 Items 血 Name 2021-11-19 JeffShopper 01 ···· 🗆 BIO-RAD Laboratories (Canada) Ltd. · 3 Items · 202.00 CAD hh PLIER DETAILS 🐨 Fulfillment Center 1 : 1329 Meyerside Drive, Mi... Estimate (228.26 CAD) Unit Price Ext. Price Subtotal 202.00 Item Catalog No Size/Packag Quantity HST/GST ng 26.26 0.00 Shipping Micro Test Tubes 2239501 500UNIT EA 29.00 2 EA 58.00 ... 🗆 0.00 Α Remove B 228.26 Add to Favorites ITEM DETAILS Move to Another Cart Add to Draft Cart or Pending PR/PO Test Tube Rack 1702961 **1UNIT EA** 144.00 1 EA 144.00 ITEM DETAILS

[Diagram 38]

A Update the Quantity for Specific Supplier Catalogue Items

Step 1. Go to a shopping **cart** with a **catalogue item**.

Step 2. In the **Quantity** field for the product modify the desired quantity.

The **Total** items will be auto revised in the left corner below the search bar of the application.

Update Information from a Form or Non-Catalogue Item (accessed via the cart)

- **Step 1.** Access your cart by clicking on the **Shopping Cart** icon at the top right corner of the screen.
- Step 2. Select My Carts and Orders then click on the View Carts.
- **Step 3.** Select the Non-Catalogue item.
- Step 4. Click on the Product Name to open the form.
- **Step 5.** Update the appropriate fields (catalogue #, price, etc.).
- **Step 6.** Select **Save** from the dropdown list at the top right of the screen.
- **Step 7.** Click the **Go** button followed by the **Close** button.

The form refreshes on the screen and the **Cart** reflects the updated values. You may now **Assign the Cart** or **Proceed to Checkout**.

Update Specific Vendor Catalogue Items

- a. Access your cart by clicking on the **Shopping Cart** icon at the top right corner of the screen, then select **View My Cart**.
- c. To select additional items, click on the supplier logo and depending on the supplier you will either remain on the Sm@rtbuy page or be taken to the supplier website and add new products. Follow the submit order process either within the Sm@rtbuy page or from the supplier website.

B Remove Selected Items from a Cart

- **Step 1.** Access your cart by clicking the **Shopping Cart** icon at the top right corner of the screen.
- Step 2. Select View My Cart.
- **Step 3.** In a multi-line cart select one or more items to be removed by placing a check in the **Select** checkbox.
- **Step 4.** Next, choose **Remove Selected Items** in the available actions dropdown list (above the items in the cart).

The system removes the selected items and updates the **Cart** values in the upper Left corner of the screen. Alternatively, you can click on the **Remove** button on the left side of each line item in the cart.

C Remove All Items from a Cart

- **Step 1.** Access your cart by clicking on the **Shopping Cart** icon at the top right corner of the screen, then select **View My Cart**.
- **Step 2.** Click on the **Empty Cart** button from the dropdown menu on the top left of the screen which is next to cart number.

Assigning a Cart to a Requisitioner

- **Step 1.** Access your cart by clicking on the **Shopping Cart** icon at the top right corner of the screen, then select **View My Cart**.
- **Step 2.** At this stage, you can choose to **Assign the Cart** (Shoppers) or click the **Proceed to Checkout** button and enter the shipping and account code information.
- **Step 3.** Click the **Assign Cart** button at the upper right corner of the screen. The Assign Cart popup displays. *[Diagram 39]*

â					All -	Search (Alt+Q)		66.67 CAD 📜	∞ ■	4 1
	Shopping Cart • 3406178 •	Assign Cart: Use	r Search		×		= •	Assign Cart	Proceed To Checko	out
6	Simple Advanced	Assign Cart To: Note To Assignee:	no value SELECT V or SEARCH				Details			~
8	Search for products, suppliers, forms, part number, etc.	Note to Assignee.	1			Q	For Jeff Shop	oper		
Â	3 Items						Name			
	1155105 Ontario Inc. + 1 Item + 1.00 CAD			Assign	Close			1-19 JeffShopper 01		
	SUPPLIER DETAILS Fulfillment Center 1 : 165 Cowan Ave., Toronto 💌						Estimate	(66.67 CAD)		>
	ltem C	atalog No. Size/I ng	Packagi Unit Price	Quantity	Ext. Price					
	1 test 6	37999 EA	1.00	Qty: 1 EA	1.00					
	ITEM DETAILS									



Determine the Assignee

If a preferred assignee is defined in the user's profile, this user displays by default.

Step 1. If a default assignee has not been assigned, click on the Search link to assign the cart to assignee. The User Search box will appear. Search by name for eligible assignees. Note: You do not need to fill out all fields in the user search. First or last name will suffice. [Diagram 40]

a				All - Search (Alt+Q)	66.67 CAD	1	2 🖛 🔺 1
	User Search						×
16	New Search						
0	Name 个	User Name	Email		Phone	Action	
	Requisitioner, Jeff	JRequisitioner	dkrishnani@grovesandcompany.com			+	
Ê							_
nh.							Close
	Item		Size/Packagi Unit Price Quantity ng	Ext. Price			

[Diagram 40]

- **Step 2.** Locate the user from the list, and click the **Select** link from the **Action** column.
- Step 3. OPTIONAL: Enter a note to the assignee, explaining the reason for this order, or any other relevant information to assist the Requisitioner processing your cart.
- **Step 4.** Click **Assign**. You will see a confirmation screen for your assigned cart.

Viewing/ Un-assigning Previously Assigned Carts

- **Step 1.** To view the previously assigned cart prior to it being submitted by the assignee, you can access it via the **Shopping Cart** icon.
- **Step 2.** Select **My Carts and Orders** as shown below.
- **Step 3.** Click the **View Carts** link to view details of the cart that was assigned or click the **Unassign** button to withdraw the cart assignment [Diagram 41(a)].

From there, carts can be updated and/or reassigned.

â						All 👻	Search (Alt+Q)	۹	0.00 CAD 📜	♡ ⊨	* 1
	Shop My Carts	and Orders View Carts A	ssigned Carts								
	Cart Mana	gement								Creat	ate Cart ?
6	Draft Carts	Assigned Carts									
8											
血	Filter Assign	ed Carts									
	Туре 🗠	Cart Number 🗠	Shopping Cart Name	Cart Description	Date Created	Total 🗠	Created By	As	signed To 🗠	Action	
. tik	Normal	3406178	2021-11-19 JeffShopper 01		19/11/2021	66.67 CAD	Jeff Shopper	Je	ff Requisitioner	View	
									View		Show menu
									Unassign		_

[Diagram 41(a)]

Deleting Shopping Carts

- **Step 1.** Select the **Shop** navigation tab and then select **My Carts and Orders** on the menu,
- Step 2. Click View Carts, select Draft Carts tab.
- **Step 3.** Use the **Delete** button on the right of the page to delete selected carts. After selecting **Delete**, the system deletes the cart

immediately. For **Drafts Assigned to Me**, a message box appears to specify a reason for deleting the cart. Once a cart is deleted, it is permanently removed and it cannot be restored. *[Diagram 41(b)]*

合					All 👻	Search (Alt+Q)	۹	0.00 CAD 📜	♡ ■	Å 1
	Shop 🕨 My Carts and Or	rders View Carts Draft Carts								
	Cart Managen	nent							C	reate Cart ?
۵۵ ي	Draft Carts 🗮	Assigned Carts								
	> Filter Draft Carts									
血	Туре 🗠	Cart Number 🗠	Shopping Cart Name	Cart Description	Date C	reated 🔺	Tota		Action	
Id.	Normal	3406178	2021-11-19 JeffShopper 01		19/11/	2021		66.67 CAD	View 💌	J
	Normal	3406206 Active	2021-11-19 JeffShopper 02		19/11/	2021		0.00 CAD	View	
									Activat Delete	

[Diagram 41(b)]

REQUISITIONER



The Requisitioner has all access as outlined in the Shopper section in addition to the following:

- A. Receiving and Reviewing Assigned Carts
- B. Adding or Changing Ship-to Addresses and Accounting Codes
- **C.** Updating Cart Information
- D. Return/Delete a Cart
- E. Submitting Carts
- F. Copying Previous Requisitions to a New Cart
- G. View Document History and Comments
- H. Assigning/Un-assigning a Substitute Requisitioner
- I. Receiving

A. Assigning and Reviewing Carts

As a Requisitioner, you will receive email notifications to let you know that a cart has been assigned to you for review and submission in Sm@rtBuy. The email contains a link that will take you to the cart. You can also log into Sm@rtBuy and review any new carts in the **Action Items** box on the upper right side of the

pag	ge . [Diagram 42]				
^		IIA	 Search (Alt+Q) 	0.00 CAD 💘	v 💌 🔎
1	Simple Advanced	Go to: Non-Catalog Item Favo	ction Items		tracts
	Search for products, suppliers, forms, part number, etc.		ly Assigned Approvals		
0		•	and Assigned To Me		

[Diagram 42]

Step 1. Click on the **Action Items** link on the **Home/Shop** page.

Step 2. Click the Carts Assigned to Me option.

Step 3. There will be list of carts available under **Assigned Carts** tab. **Click** on the Shopping Cart Name to open the cart. **[Diagram 43]**

*						All 👻	Search (Alt+Q)	٩	0.00 CAD	E	♡	P 1
	Shop My Carts	and Orders 🕨 View Carts 🕨	Assigned Carts									
	Cart Mana	igement									Cre	ate Cart ?
Го О	Draft Carts	Assigned Carts										
	> Filter Assign	ned Carts										
血	Туре 🗠	Cart Number	Shopping Cart Name	Cart Description	Date Created	Total 🗠	Create	d By 🗠	Assigned	To 🗠	Actio	on
.tile	Normal	3404356	2021-11-18 JeffShopper 01		18/11/2021	10,0	00.00 CAD Jeff Sh	opper			Viev	w 🔻

[Diagram 43]

Step 4. To review the order, click Proceed to Checkout. You will need to verify that the details like Shipping and Accounting Codes are correct. If there is a required information missing, these will be highlighted under Correct These Issues section on the right side of

the screen. Requisitioner would need to populate these required details before the request can be submitted. **[Diagram 44]**

Requis	ion • 3404356 •		_			= •	🖶 😰 Assign Cart	Submit Requisition
Summa	Taxes/S&H PO Preview	Comments	2 Attachments History					
Gener		ø ····	Shipping	ø* ···	Billing	ø v	Draft	
Cart Na	ne 2021-11-18 JeffShoppe	er 01	Ship To		Bill To		Correct these issues. You are unable to proceed until	addressed.
Descrip	on no value		Attn: Jeff Requisitioner Rm: 102		Accounts Payable East Office Building		Required: Fund	
Prepare	by Jeff Requisitioner		Dept:		4700 Keele Street		Required: Cost Centre	
Prepare	for Jeff Shopper		Accolade East 4700 Keele St Toronto, ON M3J 1P3		Toronto, ON M3J 1P3 Canada		Total (10,000.00 CAD)	
P0 Cla	es 1 View details		Canada		l		Subtotal	10,000.
	t Funds no value						HST/GST	0.

Step 5. If any information needs to be changed for shipping or accounting codes, detailed information can be found in Section B - Changing Ship-To Addresses and Accounting Codes (below).

B. Changing Ship-To Addresses and Accounting Codes

- **Step 1.** From the **Action Items** box on the **Home/Shop** page, click the **Carts Assigned to Me** option.
- **Step 2.** Select a cart that was assigned to you.
- Step 3. Click Proceed to Checkout.
- Step 4. Click on the Pencil icon in the Shipping section to update it. You can choose from one of the Default Addresses in your profile (marked with a star) or click on the Magnifying Glass in the Search Additional field to search for a different address.
- Step 5. Save when you have selected the appropriate address. [Diagram 45]

Edit Shipping		×
CURRENT ADDRES	SS	C
Attn: *	Jeff Requisitioner	Add to my addresses
Rm: *	102	
Dept:		
Address Line 1	Accolade East	
Address Line 2	4700 Keele St	
City	Toronto	
Province	ON	
Postal Code	M3J 1P3	
Country	Canada	
O My Address – Je Search additional	ff Requisitioner, 102, [Dept.], Accol:	de East, 4700 Keele St, Toronto, ON M3J 1P3, Canada
🖈 Required fields		Save Close

[Diagram 45]

Step 6. Scroll down the Accounting Codes section. Review fund and cost centre information at the header level. If you need to add the missing fund or cost centre information, click on the text Required.

If you need to change these details, click on the **Pencil** icon on the right side of the page and choose the appropriate Account, fund and cost centre combination by clicking on the **Magnifying Glass** on these fields.

Step 7. Save when you have selected the appropriate fund and cost centre. *[Diagram46]*

Edit Accounting Codes	um40j			
Account Number				
Account *		301000	٩	
Fund / Cost Centre				
Fund * Cost Cer	tre * 높 Activity	Time	Location	
200 🖌 11302	Q Search	Q Search	Q Search	Q

[Diagram 46]

Step 8. Review the **Account** number for each item at the line level or if applicable, at the header level under the **Accounting Codes** section. If the account number is incorrect, correct it by clicking on the **Pencil** icon on the right side of the page and choose the

appropriate Account using the **Magnifying Glass** option to search for an account code.

Step 9. Save when you have selected the appropriate account code. *[Diagram 47]*

2	Test item 2			EA 1,0	00.00 15 EA 🍈 15,000.00	🗆	What's next f	for my order? Cost Centre Approval	~
	∧ ITEM DETAILS						Approvers	There are no approvers	
	Contract:	no value		Internal Note	no value				c3.0
	Taxable	\checkmark		Internal Attachments	Add		Workflow		년 🖶
	∧ ACCOUNT				Values have been overridden for this line	/ #		ive f Requisitioner	
	Account		472200 Rentals-Office Equipment		12		On	behalf of: Jeff Shopper	
			Meritala-Onitive Edupment				PR	Validation	

[Diagram 47]

C. Updating Cart Information

If you have a cart that has been submitted to you with an error in the Type or Quantity of an item ordered, you can alter the quantity or remove lines from the cart.

Updating Quantities

To update the quantity of an item ordered, open the cart, alter the number in the **Quantity** field then proceed with checkout as normal. **[Diagram 48]**

This is possible for most Catalogues. If the **Quantity** field cannot be changed, you will need to remove the line item, return to the Punch-Out site, reselect the appropriate item and quantity and add it to the cart.

						🗆	Draft	
∧ SUPPLIER DETAILS M Fulfillment Center 1 : 1329 F	Meyerside Drive, Mi 🔻						S Correct these issues.	~
Contract no value	PO Number To Be A	signed					You are unable to proceed until addressed.	
							Required: Shipping address	
Item	Catalog No.	Size/Packagin	Unit Price	Quantity	Ext. Price		Required: Fund	
		g					Required: Cost Centre	
1 Micro Test Tubes	2239501	500UNIT EA	29.00	2 EA	58.00	…	Total (65.54 CAD)	~
∧ ITEM DETAILS							Subtotal	58.00

[Diagram48]

Removing Line items

If you wish to remove a line item from the shopping cart, scroll down to the Line Item section and click on the **Ellipsis (three dots)** icon on the right side of the screen beside the **Ext. Price** for the line you want to remove. Select **Remove** from the dropdown options available. **[Diagram 49(a)]**

Summary	Taxes/S&H PO P	Preview Comments Attachr	nents History					
Iter	m		Catalog No.	Size/Packaging	Unit Price Quantity	Ext. Price	Draft	
1 Me	cro Test Tubes		2239501	500UNIT EA	29.00 2 EA	58.00	Correct these issues.	nddressed.
^	ITEM DETAILS						Override	
	Manufacturer Name	Bio-Rad Laboratories - Life Sciences	Contract:	no value	Internal Note	no value	Ship To	
			Taxable	\checkmark	Internal Attachments	Add	Bill To	
	Manufacturer Part Number	2239501					Credit Card Info	-
							Account Number	
	More Information URL	http://www.bio- rad.com/prd/en/US					Fund / Cost Centre	20,0
	MSDS URL	http://www.blo-					Remove	2,60
		rad.com/msds/ 📑					Add to Eavorites	

[Diagram 49(a)]

Additionally, if you wish to remove multiple line items, you can click on the checkbox for each line item on the right side of the screen (the check box next to the Ext. Price of the line item) and scroll up above the first line item and click on the small **Red Dropdown Arrow** and click on select **Remove Selected Items** from the dropdown menu. **[Diagram 49(b)]**

									Draft
152	ltems							2 –	Correct these issues. You are unable to proceed until addressed.
BIO-	RAD Laboratories (C	anada) Ltd. • 152 Ite	ms · 20,058.00 CAD						Add to Favorites Remove Selected Items
^ si	UPPLIER DETAILS 📆 FU	Ifiliment Center 1 : 1329 Mey	yerside Drive, Mi 🔻						Remove All Items
0	ontract	no value	P0 Number	To Be Assigned					Move to Another Cart > Change Supplier
	ltern		Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price		Add to Draft Cart or Pending PR/P0 > 20.0
1	Micro Test Tubes		2239501	500UNIT EA	29.00	2 EA	58.00		HST/GST 2,0 Shipping
	49(b)]								Handlino

Finally, if you have been assigned a cart, you can return the whole cart to the Shopper with comments requesting the removal of line items or item quantities, or you can delete the cart altogether. Instructions for Returning and Deleting a cart are in the next section. **[Diagram 50 and 51]**

D. Returning and Deleting Carts

As a Requisitioner, in addition to **Updating** carts, you can also **Return** a cart to the Shopper that submitted it to you, or **Delete** the cart completely.

If you have reviewed a cart and wish to return it to the Shopper for correction:

Step 1. Click the dropdown arrow next to the Shopping Cart number and select Return Cart option from the dropdown list. Alternatively, click on the Return Cart button at the upper right side of the screen. [Diagram 50]

â		_				All 🕶	Search (Alt+Q)		22,665.54 CAD	Ä	♡ 🟴	و م
	Shopping Cart • 340617	•					= =	Return Cart	Assign Cart		Proceed To Ch	eckout
		Return Cart										
6	Simple Advanced	Empty Cart						Details				~
9	Search for products, suppliers, for	Create New Cart					Q	For				
		View Carts						Jeff Requisitio	ner			
血	152 Items	View Cart history					· ·	Name				
	BIO-RAD Laboratories (Canad	da) Ltd. · 152 Items ·	20,058.00 CAD					2021-11-19	JeffShopper 01			
1th		,										
[Diag	(ram 50]											

- **Step 2.** You will be asked to enter a reason for the return of the cart, and instructions for what the Shopper needs to fix before resubmitting the cart. The note you leave here will appear in the **Comments** section of the requisition and as part of the **History**.
- **Step 3.** Click **Return** when you have completed the note. The cart will be sent automatically to the Shopper for correction. **[Diagram 51]**

									22,003.54 040	
12	Shopping Cart • 3406178 •	Return Cart		×				= +	Return Cart Assign Cart	Proceed To Checkout
16	Simple Advanced	Return Cart To:	Jeff Shopper				_		Details	~
8	Search for products, suppliers, forms, p	Note:	Please attach a quote and u code	pdate the acconting				Q,	For Jeff Requisitioner	
血	152 Items		949 characters remaining	expand clear			1	-	Name	
11h	BIO-RAD Laboratories (Canada		_	_			[2021-11-19 JeffShopper 01	
	SUPPLIER DETAILS		R	eturn Cancel					Estimate (22,665.54 CAD)	~
	Item		Catalog No.	Size/Packaoing	Hait Price	Ourantitu	Ext Price		Subtotal	20.059.00

[Diagram 51]

If you have reviewed a cart and wish to **Delete** it completely, ensure you are deleting the correct cart as once you have deleted a cart, you can no longer retrieve it. **[Diagram 52]**

- **Step 1.** From the **Action Items** icon on the **Home/Shop** page, click the **Carts Assigned to Me** option.
- **Step 2.** Click the **Delete** button available in the dropdown list on the right of the page.
- Step 3. You will be asked to enter a reason for deleting the cart. The note you leave here will be sent to the Shopper via an email. Click OK when you have completed the note. The cart will be removed automatically from your Drafts Assigned to Me list.

â							All 👻	Search (Alt+Q)	۹	22,665.54 CAD 📜	∞[••]
	Shop 🔸 My Carts an	d Orders 🕨 View Carts 🕨 Assigned Cart	\$								
2	Cart Manage	ement									Create Cart
6	Draft Carts	Assigned Carts									
8	Assign Substitute										
血	 Filter Assigned 	Carts									
	Туре 🗠	Cart Number 🗢	Shopping Cart Name	Cart Description	Date Created	Total 🗠		Created By 🗠	4	Assigned To	Action
հե	Normal	3406178 Active	2021-11-19 JeffShopper 01		19/11/2021		22,665.54 CAD	Jeff Shopper	J	leff Requisitioner	View 💌
										View	
										Return	
										Delete	
[Dia	gram 52	1									

E. Returned Requisition from Approver

- **Step 1.** Returned requisitions will be assigned back to the Shopper. Click on the **Action Items** icon and select **My Returned Requisitions** to open the returned cart
- **Step 2.** Select **Comment** tab to view reason for return.
- **Step 3.** Make changes as required, and then resubmit the requisition by using the **Assign Cart** button.
- Step 4. If you cannot make a change, and instead decide to withdraw your cart, then go to Action Items and select My Returned Requisitions.
- **Step 5.** Use the **Delete** option from the **Action** dropdown on the right of the page

F. Submitting a Cart

Once your **Shipping** and **Accounting Codes** information are entered, review the requisition and click **Submit Requisition**. *[Diagram 53]* The system generates a confirmation message that summarizes the requisition.

	am 531								
8	Cart Name 2021-11-19 JeffS	nopper 01	Ship To		Bill To		Total (2	2,665.54 CAD)	~
	General	ø ····	Shipping	ø ····	Billing	ø ····	~	Draft	
6	Summary Taxes/S&H PO Pr	view Comments	Attachments History						
	Requisition • 3406269 •					=	• 🖶 🕄	Assign Cart	Submit Requisition
合						All 👻 Search (A	(P4)	22,665.54 CAD 📜	∞ 🕛 🔎

[Diagram 53]

G. Copying Previous Requisitions to a New Cart

- **Step 1.** Select **Orders** icon located on the left-hand menu Bar and then select **My Orders– My Requisitions**
- **Step 2.** The list of your requisitions displays, select the appropriate requisition number.
- Step 3. Select Copy to New Cart from the Available Actions drop-down option available next to the Requisition Number on the left corner of the page. [Diagram 54]
- Step 4. A new shopping cart is created, and all line item(s) and requisition custom information are copied to this new shopping cart. The user is brought to shopping cart page, ready for further action to process the order.

Requisition	· 151072001	•			= • f	2 Logout	2 of 2378 Results	· • <
Summary	Taxes/S&H Cor	Copy to New Cart						
		Add Comment						
General		Add Notes to History		Billing	🗸		Completed	
Status	Completed	View My Orders (Last 90 Days)		Bill To		Total (2,444.53 CA	D)	
	(16/11/2021 10:2	Continue Shopping		Accounts Payable		Subtotal		2,163
Submitted	16/11/2021 10		P	4700 Keele Street Toronto, ON M3J 1P3		HST/GST		281
Cart Name	2021-11-11 jch	View Carts		Canada		Shipping		0
Description	no value	View Cart return message(s) See configuration for this requisition				Handling		0

[Diagram 54]

H. Viewing Document Comments and History

Reviewing the **Comments** and **History** for an order is a common way to track status and view an audit trail of events. Requisitioners can select to view the comments only for the document that is open (the PR, PO, etc.) or, for all associated information for all document types (requisitions, purchase orders, invoices and receipts). This provides the ability to see all related comments on a single comments tab and saves valuable time toggling to different screens.

- Step 1. Open the document (the PR, PO, etc.). You can find documents by using the My Requisitions or My Orders links under Orders icon on the left hand side, and via keyword search. Once you have found your document, click on the Requisition or PO number hyperlink to open it.
- Step 2. Go to the Comments tab to view comments. [Diagram 55] By default, only those comments specific to the opened document will display. Use the Show comments for dropdown menu to view any associated comments on related Invoices, POs and PRs.

Buy			Requisitions •	Search (Alt+4	2) 0.0	0 CAD 📜	∞ ⊨	0
51049849 🕶				≡ ⊖	C Logout	2 of 2379 Results	• • <	>
S&H Comments 2 Attachments	History							
2		Show comments for	All	+		Completed		
			Requisition		Total (52.38 CAD)			~
5/11/2021 10:52:09 AM		Requisition - 1510498	Purchase Order	Ξ.	Subtotal			46.35
			Invoice					6.03
			Receipt		Handling			0.00
1/11/2021 9:42:53 AM		Requisition - 1510498-	49 Requisition assigned 5	ii i				52.38
:	51049849 Comments Datachments Comments Datachments Comments Parachments Comments Co	2/521 Comments 2 Attachments History 2 16/11/2021 10:52:09 AM	2 Show comments of the characteristic structure of the charact	22 Comments Distanchments History	Indeged a startments History	S1049649 C Logot USSUT Comments @ Logot USSUT Comments @ Logot 16/11/2021 10:5209 AM Requiring Tissue Purchase Order Support Receipt Support Receipt	Comments Co	Comments Co



Step 3. Go to the History tab to view system history. [Diagram 56] By default, only those actions for the open document will display. Use the filter options available to view the history for all associated documents. Enter the applicable details such as start/end date etc. and then choose from the Document Type dropdown menu the type of document you want to see history for.

A YORK L Sm@rtBuy					Requisiti	ions 👻 Search (Alt	+Q) (0	.00 CAD 📜	♡ ► 🔎
Requisition • 151049	9849 -					= =	Logout	2 of 2379 Results	• < >
Summary Taxes/S&H	Comments 😢 Atta	chments History							
01/11/2021	(16/11/2021	Action	▼ User		٩		Total (52.38 CAD)	Completed	~
All							Subtotal HST/GST		46.35 6.03
Requisition Purchase Order						Export CSV	Shipping		0.00
Invoice Receipt	1-20 of 26 Results					20 Per Page 🔻			52.38
Line Date/Time	L llear	Stop(c) Action	Field	From To	Noto				

[Diagram 56]

I. Assigning/Unassigning a Substitute Requisitioner

- **Step 1.** Navigate to the **Shop** cart icon on the upper left corner of the screen.
- Step 2. Click the My Carts and Orders Open My Active Shopping Cart-Assigned Carts
- Step 3. Click the Assign Substitute link, as shown below in Diagram 57

^	YORK U Sm@rtBuy	Requisitions 🔻	Search (Alt+Q)	٩	0.00 CAD 📜	♡ ■ .	1
	Shop + My Carts and Orders + View Carts + Assigned Carts						Cogout
2	Cart Management					Create Ca	art ?
6	Draft Carts Assigned Carts						
♀ ⊕	Assign Substitute						

[Diagram 57]

- Step 4. From the User Search popup, enter the criteria to find the user that you would like to assign as the substitute Requisitioner. Once the user criteria are entered, click the Search button. Only those with the appropriate role will be displayed on the search results list. [Diagram 58]
- **Step 5.** Select the appropriate user by clicking the **Select** button to the right of the user's name.
- **Step 6.** When you are ready to end the substitution, click **End Substitution** on the **Assigned Carts** tab to remove or end the substitution.

📕 User Search - Google	Chrome — 🗆	×
solutions.sciquest	com /apps/Router/GenericUserSearch?Tmstmp=1637081843208511&returnFunction=setAssign	Q
User Search		?
Last Name 😧		
First Name 😧		
User Name 😧		
Email 😧		
Department 😧	✓	
Position 0	~	
Role 9	~	
Results Per Page	10 🗸	
Search		

[Diagram 58]

J. Receiving Items (Creating Quantity Receipts) on POs

Receiving is only required for purchase orders greater than or equal to \$5,000. To create a receipt for goods and services you will need to locate the purchase order. To do this:

Step 1. Select Orders icon located on the left side and then select My
 Orders- My Purchase Orders

	DrtBuy		Requisitions 🔻	Search (Alt+Q)		0.00 CAD 🗮	V 🖷 🔎
Simple Ad	anced		Go to: Favourite	s Forms Quick	Order Brows	e: Suppliers C	Categories Contracts
Orders	Quick search Q						Q
Search My Orders	My Requisitions My Purchase Orders						Logout
Approvals	My Invoices My Purchase Orders My Receipts Apparel My Procurement Requests						v
[Diagram 59]	my Friodurenteau nequesta						
Step 2	. Click on the Order numl	ber you are re	eceiving				
	Select Receipts tab fror	n the options	availab	le at t		•	the
		n the options	availab	le at t		•	
Step 3	Select Receipts tab fror	n the options	availab	le at t Diagra)]	♥ ♥ ♥ ₽
Step 3	 Select Receipts tab from page and click on the + er · P50001544 Revision 0 • 	n the options	availab	le at t Diagra	im 60	0.00 CAD	♥ ♥ ♥ ₽
Step 3	 Select Receipts tab from page and click on the + er • P50001544 Revision 0 • may revisions Confirmations Stipments Receipts motices 	n the options icon to add re	availab	le at t Diagra	im 60	0.00 CAD	r ♥ ♥ ↓♥, esuits ▼ < >
Step 3	 Select Receipts tab from page and click on the + er • P50001544 Revision 0 • may revisions Confirmations Stipments Receipts motices 	n the options icon to add re	availab	le at t)iagra Search (AN+O)	am 60 ≡ ⊕	0.00 CAD	r ♥ ♥ ↓♥, esuits ▼ < >

Step 4. Scroll down to the **Line Details** section, the **Status** by default would be **Received**. Validate the Quantity or update it if needed to match

the number of items received. Click on **Complete** at the top right side of the screen to create the receipt. **[Diagram 61]**

合				All 👻 Search (Alt+0		0.00 CAD 🗑 🗢 🔎
1	Quantity Receipt • 472037				= •	Save Updates Complete 🔻
íð	Summary Comments Attachments History Canada					
8	Line Details				Details	Draft 🗸 🗸
Ш Ш	P0 • P50001544			0.0	Creation Date	19/11/2021 4:45:06 PM Manual
	Line Item	Catalog No.	Quantity Status		Supplier	Aramark Canada Ltd.
	1 Continental Package 15 @ \$9.99 Hot Beverages 15 @ \$3.98	58088 1	1 Received	• • • •	Received by	Jeff Requisitioner

[Diagram 61]

Note: If you have returned a portion of the order or you have only received a partial amount of the quantity of items ordered, please contact a Sm@rtBuy Administrator.

APPROVER



The role of the Approver is to review requisition details; then either approve, reject or return to the Requisitioner and if applicable, or forward approval authority to another Approver.

- A. Reviewing Action Items
- B. Moving Documents to My Approvals Folder
- C. Approving a Requisition
- D. Rejecting a PR
- E. Forwarding a PR
- F. Assigning a Substitute Approver
- G. Adding a Comment
- H. Returning a Requisition
- I. Viewing Approvers

A. Reviewing Action Items

The Action Items Flag icon is located on the top right side of the page. [Diagram 62] Click on Action Items to view action items for My Assigned Approvals. To review and approve new requisitions click on the Requisitions under Unassigned Approval.

â		All Search (Alt+Q)	0.00 CAD 🗶 🔍 🏴 💵
	3 JAGGAER revised its Sandse Privacy Policy effective May 25, 2018. By closing this banner, you acknowledge that when you use our Solution, we process your personal information as descri	t Action Items	×
- 22		My Assigned Approvals	
6	Simple Advanced Go	Requisitions To Approve	2 tracts
<u></u>	Search for products, suppliers, forms, part number, etc.		۹.

[Diagram 62]

B. Moving Documents to My Unassigned Requisition/Approvals Folder

Step 1. From the Action items – click on Requisitions under Unassigned Approval you will be taken to the appropriate sub-tab in the approval navigation tab. [Diagram 63]

â		All 🕶	Search (Alt+Q)	0.00 CAD 📜 🔍 🏴 💶
	3. JAGGAER revised its Sandon Primey Policy effective May 25, 2018. By closing this banner, you acknowledge that when you use our Solution, we process your personal information as descri	Action	1 Items	×
-		My As	signed Approvals	
6	Simple Advanced Go	Requisi	tions To Approve	2 tracts
<u>8</u>	Search for products, suppliers, forms, part number, etc.			Q.,

[Diagram63]

Step 2. To move requisition to My PR Approvals folder, click the check box and from the Select an action dropdown select assign button.
 [Diagram 64]

						All 🕶	Search (Alt+Q)	0.00 CAD	v 🏴	1
3 JAGGAER revised its Service Privacy Policy effect	ive May 25, 2018	By closing t	this banner, you acknow	vledge that when you use our Solution, we	process your personal information	n as described in our Servi	ce Privacy Policy.			
Approvals								e s	ubmit Date Newes	t Firs
Requisitions (2) Involces										
Your Selections	(4-	Total Re	esults 2 Display 2	0 per folder 👻						
Date Range		~ MY	PR APPROVALS							
All Dates	•	\sim	REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUISITIONER	AMOUN	t.	
Assigned Approver + Test Test21 \times			3405938	401 Glass & Window Hardware	Test Test21	19/11/2021 4:36 AM	Jeff Requisitioner	226,000.00 CAD	<u>ک</u>	· ~
Filters			Requisition Name No. of line items	2021-11-19 JRequisitioner 01 1	Folders	0 Days in fol	der [My PR Approvals]			
		\square	3404348	1200519 Ontario Inc.	Test Test21	18/11/2021 1:05 PM	Jeff Groves	11,300.00 CAE) Ľ	· ~
401 Glass & Window Hardware 1200519 Ontario Inc. Select Multiple (5	1		Requisition Name No, of line items This PR has notes	2021-11-18 jeffgroves 01 1	Select an action Assign Approve/Complete Forward	L.	der [My PR Approvals]			
DEPARTMENT No Department					Return to Shared Folder Place PR On Hold					
No Deparament	2	\sim	ITEMS SELECT	ED	Add Notes to History					

[Diagram 64]

Step 3.The requisition is now in the user's Requisitions to Approve
folder. [Diagram 65] To approve requisitions, click on the Action
Item Menu on the top right-hand side of the page and select
Requisitions to Approve.

*		All 🔹	Search (Alt+Q)	A,	0.00 CAD	¥	♡ ⊨	1
	3 JAGGAER revised its Sandsa Physey Policy effective May 25, 2018. By closing this banner, you acknowledge that when you use our Solution, we process your personal information as describ	Action	items					×
2-1		My As	signed Approvals	>	1			
6	Simple Advanced Go	Requisi	tions To Approve				0	tracts
8	Search for products, suppliers, forms, part number, etc.							Q

[Diagram 65]

Step 4. A list of all requisitions will be displayed. Click on the **Requisition Number** to open and review the requisition before approval. To quickly move multiple Requisitions to your approval folder:

- **Step 1.** Enable the **Select** checkbox for the individual items that you would like to assign to my approvals folder next to the **Action Column** OR enable the checkbox at the Header bar to enable all available line items.
- **Step 2.** After you have selected which documents to assign, select the **Assign** option from the **Action** drop-down. **[Diagram 66]**

Regulation Invoices Your Selections Total Results 2 Display 20 per folder • Date Range NY PR APPROVALS Assigned Approver • Test Test21 × MY PR APPROVALS Assigned Approver • Test Test21 × Regulation No. SupPLIERS Assigned Approver PR bATE/TIME Regulationer 226,000.00 CAD Filters SupPLIER 340593 401 Glass & Window Hardware Test Test21 19/11/2021 4.36 AM Jeff Regulationer 226,000.00 CAD Regulation Rame 2021-11-19 JRegulationer 01 Roders 0 Days in folder [My PR Approvals] No. 11,300.00 CAD Regulation Rame 2021-11-19 JRegulationer 01 Reders 0 Days in folder [My PR Approvals] Jeff Groves 11,300.00 CAD Regulation Rame 2021-11-19 JRegulationer 01 Result Test21 18/11/2021 1.95 PM Jeff Groves 11,300.00 CAD Regulation Name 2021-11-19 JRegulation Inc. Test Test21 18/11/2021 1.95 PM Jeff Groves 11,300.00 CAD Regulation Name 2021-11-19 JRegroves 01 Select an action Select An	All • Search (Alt+Q)	0.00 CAD 📜	♥ №
Perspectation Perspectation Perspectation Perspectation Regulations Perspectation Total Results 2 Display 20 per folder + Date Range Assigned Approver - Test Test 21 × MY PR APPROVALS Assigned Approver - Test Test 21 × MY PR APPROVALS Assigned Approver - Test Test 21 × PR DATE/TMME Regulation No. SupPLIER Filters SupPLIER 3405190 Ontation Inc. 1 Fidders 0 Days in folder [My PR Approvals] Add Groves 11,300.00 CAD Regulation No. SupPLIER 3405190 Ontation Inc. Test Test 21 18/11/2021 1.95 PM Jeff Groves 11,300.00 CAD Regulation No. SupPLIER 3405190 Ontation Inc. Test Test 21 18/11/2021 1.95 PM Jeff Groves 11,300.00 CAD Regulation No. SupPLIER 10001910 Ontation Inc. Test Test 21 18/11/2021 1.95 PM Jeff Groves 11,300.00 CAD Regulation Name 2021-11-18 [effgroves 01 Select an action Select Multiple (Complete Forward	Phone Palley effective May 25, 2018. By closing this banner, you acknowledge that when you use our Solution, we process your personal information as described in our Service Privacy Policy.		
Your Selections It total flexults 2 Display 20 per folder + Date Range: All Dates MY PR APPROVALS © All Dates MY PR APPROVALS © Resigned Approver • Test Test21 × M PR APPROVALS © Filters 401 Glass & Window Hardware Test Test21 19/11/2021 4.36 AM Jeff Requisitioner 226,000.00 CAD Requisition Name 2021-11-19 JRequisitioner Test Test21 19/11/2021 4.36 AM Jeff Requisitioner 226,000.00 CAD Requisition Name 2021-11-19 JRequisitioner Test Test21 19/11/2021 4.36 AM Jeff Requisitioner 226,000.00 CAD Requisition Name 2021-11-19 JRequisitioner Test Test21 19/11/2021 1.35 FM Jeff Groves 11,300.00 CAD Requisition Name 1 200519 Ontanio Inc. Test Test21 18/11/2021 1.35 FM Jeff Groves 11,300.00 CAD Requisition Name 1 2021-11-18 Jeffgroves 01 Select an action Ider My PR Approvals Vector No of Inst tenss 1 This PR has notes Vector Prover (Complete Forward Vector Vector		📌 Submit	Date Newest Fin
Call Calculation MY PR APPROVALS MY PR APPROVALS MY PR APPROVALS SuppLetes Assigned Approver • Test Test21 × SuppLetes SuppL	ices		
Date Range All Dates All Dates ASSIGNED APPROVER PR DATE/TIME REQUISITIONER AMOUNT Assigned Approver • Test Test21 × Image: Control of the second s	c- Total Results 2 Display 20 per folder 🕶		
Assigned Approver • Test Test21 × Image: Constraint No. SUPPLIES Assigned Approver PB butEntTime RequisitionKeR Autourt Filters 3405938 401 Glass & Window Hardware Test Test21 19/11/2021 4.36 AM Jeff RequisitionKeR 226:000.00 CAD Filters Image: Constraint Name 2021-11-19 Allequisitioner 01 Folders 0 Days in folder [My PR Approvals] 226:000.00 CAD Monoi filter items 1 2021-11-19 Allequisitioner 01 Folders 0 Days in folder [My PR Approvals] 11,300.00 CAD Monoi filter items 1 2021-11-19 Jeffgroves 01 Select an action Ker [My PR Approvals] 11,300.00 CAD No. of line items 1 Select Multiple 13 The PR has notes V Assign	V MY PR APPROVALS 📀		
Filters Projection Solution Name 2021-11-19 JRequisition Name Poders 0 Days in folder [My PR Approvals] SuPPLIER 401 Glass & Window Hardware 1 401 Glass & Window Hardware 1 1200519 Ontation Inc. 1 Select Multiple C3 1	REQUISITION NO. SUPPLIERS ASSIGNED APPROVER PR.DATE/TIME REQUISITIONER	AMOUNT	
No. of line items 1 SupPLICE 401 Glass & Window Hardware 1 1200519 Ontario Inc. 1 1200519 Ontario Inc. 1 Select Multiple 13 1	t Test21 X 2405938 401 Glass & Window Hardware Test Test21 19/11/2021 4:36 AM Jeff Regulationer	226,000.00 CAD	Ľ,
SUPPLIER Regulation Name 2021-11-18 jeffgroves 01 Select an action Ider [My PR Approvals] Select Multiple 1 This PR has notes Proverd			
Requisition Name 2021-11-18 jeffgroves 01 Select an action Ider [My PR Approvalia] 401 Glass & Window Hardware 1 No. of line items 1 Approve/Complete 1200519 Ontario Inc. 1 This PR has notes Approve/Complete Select Multiple (3 Forward	3404348 1200519 Ontario Inc. Test Test21 18/11/2021 1:05 PM Jeff Groves	11,300.00 CAD	Ľ 、
	Ave 1 No. of line items 1 Assey 1 This PR has notes Approve/Complete		
DEPARTMENT Place PR On Hold			
No Department 2 2 17EMS SELECTED Add Notes to History	2 Add Notes to History		

[Diagram 66]

C. Approving a Requisition

After you have moved the item(s) to your approvals folder, the next step is to review the requisition or purchase order for processing.

Quick Approval Process

If you do not need to open a requisition before it is approved:

- **Step 1.** Click on the **Requisitions** under **Unassigned Approval** link for a list of requisitions.
- **Step 2.** Find the requisition and click on the corresponding checkbox.
- **Step 3.** From the dropdown list select **Approve/Complete** and click **GO**. *[Diagram 67]*

						All 🕶	Search (Alt+Q)	0.00 CAD 👻	∞ 🕫 🕻
JAGGAER revised its Service Privacy Policy effective M	lay 25, 2018. I	By closing t	this banner, you acknowl	edge that when you use our Solution, we	process your personal informati	on as described in our Servic	e Privacy Policy.		
Approvals								🛷 Submit I	Date Newest First
Requisitions (2) Invoices									
Your Selections	←	Total R	esults 2 Display 20	per folder 👻					
Date Range		~ MY	PR APPROVALS						
All Dates	•	1	REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUISITIONER	AMOUNT	
Assigned Approver + Test Test21 \times			3405938	401 Glass & Window Hardware	Test Test21	19/11/2021 4:36 AM	Jeff Requisitioner	226,000.00 CAD	Ľ ~
	_		Requisition Name	2021-11-19 JRequisitioner 01	Folders	0 Days in fold	ier [My PR Approvals]		
Filters			No. of line items	1					
∧ SUPPLIER		\sim	3404348	1200519 Ontario Inc.	Test Test21	18/11/2021 1:05 PM	Jeff Groves	11,300.00 CAD	Ľ ~
			Requisition Name	2021-11-18 jeffgroves 01	Select an action	le	ler [My PR Approvals]		
401 Glass & Window Hardware 1200519 Ontario Inc.	1		No. of line items This PR has notes	1	Assign				
Select Multiple 🖾			This PR has notes	· <	Approve/Complete	\rightarrow			
△ DEPARTMENT					Forward Return to Shared Folde				
No Department	2	~	ITEMS SELECTE	D	Place PR On Hold Add Notes to History				

[Diagram 67]

Standard Approval Process

With standard approvals, the Approver opens the order and reviews the information, then approves the order.

- **Step 1.** Click on the **Requisition Number** to open the requisition page.
- **Step 2.** Review the information and make updates and comments as needed.
- Step 3. Select the Approve & Next to approve the requisition. [Diagram 68]

Requisition • 3405	938 -				≡ ⊛ 🖶	I of 2 Results ▼ < (>	Approve & Next
Summary Taxes/S&H	PO Preview Comments 🕚	Attachments History					
General	1	Shipping	1	Billing	ø v	Pending	
Status	😳 Pending	Ship To		Bill To		Total (226,000.00 CAD)	
Submitted	Cost Centre Approval (Test Test21) 19/11/2021 4:36 AM	Attn: Jeff Requisitioner Rm: 102		Accounts Payable East Office Building		Subtotal HST/GST	200,000 26,000
Cart Name	2021-11-19 JRequisitioner 01	Dept: Accolade East 4700 Keele St		4700 Keele Street Toronto, ON M3J 1P3 Canada		Shipping	0
Description	no value	Toronto, ON M3J 1P3 Canada		Callada		Handling	0
Prepared by	Jeff Requisitioner						226,000
PO Clauses	1 View details					What's next?	
Overdraft Funds Request (use only with resubmission)	no value					Workflow	C2 (
						Submitted 19/11/2021 435 AM	
Accounting Codes					ø v	Jeff Requisitioner	
Account Number						Completed	2

D. Rejecting a Requisition

The Approver is required to open a requisition in order to reject it. Once a requisition is rejected it cannot be reinstated.

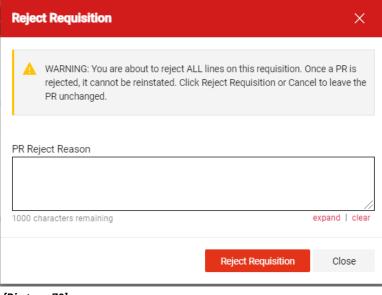
- **Step 1.** Follow the Standard Approval Process noted above in Steps 1 & 2.
- **Step 2.** Go to the **Available Actions** drop down menu at the top of the Requisition and select **Reject Requisition** to reject the entire requisition. *[Diagram 69]*

Summary Taxes/S&H	PO Preview Comments						
	Contractor Contractors	Attachments History					Approve
General	1	Shipping	ø	Billing	1	Pendi	Return to Share Place on Hold
	Cost Centre Approval (Test Test21)	Ship To		Bill To		Total (226,000.00 CAD)	Return to Requ
Submitted Cart Name Description	19/11/2021 4:36 AM 2021-11-19 JRequisitioner 01 no value Jeff Requisitioner	Attr: Jeff Requisitioner Rm: 102 Dept: Accolade East 4700 Keele St Toronto, ON M3J 1P3 Canada		Accounts Payable East Office Building 4700 Keele Street Toronto, ON M3J 1P3 Canada		HST/GST	Forward to Reject Requisit
PO Clauses Overdraft Funds Request (use only with	1 View details no value					What's next? Workflow	[
resubmission)						Submitted 19/11/2021 4:35 AM Jeff Regulstioner	
Accounting Codes					1 v	PR Validation	

[Diagram 69]

Step 3. Enter a rejection reason in the pop-up box. **[Diagram 70]**

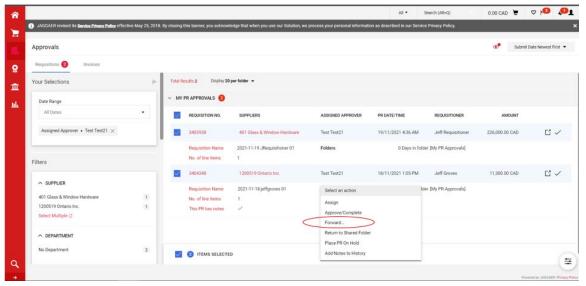
Step 4. Select the **Reject Requisition** button to save the comment and complete the process.



E. Forwarding a Requisition

There are two options when forwarding a requisition that has been assigned to you.

- **OPTION 1:** If you know you want to forward a requisition or order that has not been reviewed (opened).
 - **Step 1.** From the **Action Items** on the top right side of the Home Page, select **Requisition to Approve**.
 - **Step 2.** Select the checkbox on the left side of the folder where the requisition number and click on **Select an** action dropdown.
 - Step 3. Select the Forward... option from the drop-down box and click theGo button. Skip to the next step #3 from option2. [Diagram 71]



[Diagram 71]

- **OPTION 2:** If you would like to forward a requisition once it has been opened (accessed).
 - **Step 1.** Follow the Standard Approval Steps 1 & 2. Then follow steps 2-7 below.
 - **Step 2.** Select the **Forward...** option from the **Available Options** dropdown box and click the **Go** button.
 - **Step 3.** Enter specific user criteria to find the recipient of the forwarded requisition. *[Diagram 72]*
 - **Step 4.** Click the **Search** button.
 - **Step 5.** Select the appropriate user by clicking the Select (+) button to the right of the user's name. Only users with the Approver role will appear on the search results list.

Step 6. Enter a note for the user that explains the reason for forwarding the requisition.

Requisition • 34055	138 •				≣ ⊛ ⊕	0 1d2Reuts • <	Approve & Next	Last Name 👩		
Summary Toos/Silv	PO Preside Comments 🚺	Abdreta Hibri					Approve Return to Shared Folder	First Name 🔵		
General	P	Shipping Ship Ta	1	Billing Bill To	/ v	Pend Total (225,000.00 CAD)	Place on Hold Return to Requisitioner	User Name 👩		
Submitted Cart Name	19/11/2021 4:36 AM 2021-11-19 .Requisitorer 01	Attr. Jeff Requisitioner Bm: 102 Dept Accolute East		Accounts Payable East Office Building 4700 Keele Street Toronts, ON M3J 1P3		Subtral HSTLOST Sheping	Forward to	Email 👩		
Description Prepared by	no value Jeff Requisitioner	4700 Keele St. Toronto, ON MSJ 1P3 Canada		Canada		Handling	0.00 225,000.00	Department 👩		
PO Classes Overbalt Funds Request (use only with	1 View details no value					What's next? Workflow	Če.	Position 👩		
(use only wan resubmission)						Submitted		Role 👩		
Accounting Codes					1 ···· v	PR Valdation		Results Per Page	10	
Account Number						Comparison				

Step 7. Click the **Forward** button.

[Diagram 72]

F. Assigning a Substitute Approver

Step 1. Use the Orders icon on the left side of the screen, then choose Approvals and click the Assign Substitute Approvers-Requisitions option. [Diagram 73]



[Diagram 73]

Step 2. To assign a substitute for all your workflow folders click the labeled **Assign Substitute to All Requisition Folders** button at the upper right corner of the screen. *[Diagram 74]*

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	Orders + Approvals + Assign Substitute App	provers-Requisitions								
2	() JAGGAER revised its Service Privacy	Policy effective h	lay 25, 2018. By closing this banner, you acknowledge tha	st when you use our Solution, we process your personal information as	described	in our Service Privacy	Policy.			×
6			Showing 1 - 1 of 1 Results	All Folder Results	Ass	ign Substitute to All Re	quisitions F	Iders End Substitute		itions Folders on Actions 👻
8	Search Details	•	Results Per Page 20 🗸	Sort by: Folder name ascending 🗸					+ Pag	1 of 1 1 7
î			Folder Name	Approver		Sub	stitute		Action	0
	Filtered by		My PR Approvals	Test Test21					Assign	0
ш	Type: Requisitions									

[Diagram 74]

- **Step 3.** Select the checkbox. Include **Date Range for Substitution** [*Diagram 75*]
- **Step 4.** Type the assignee's name into the **Substitute Name** search field, as you type, the system will look for a match. Click on the match for the name you typed.
- **Step 5.** Set a date and time for the start and end of this substitution. Once you have completed all fields, click **Assign**.

Include Date Range for	Substitution		
Substitute Name *	Type to filter	Q	
Start Date *		•	
	dd/mm/yyyy hh:mm a		
nd Date *		•	
	dd/mm/yyyy hh:mm a		

[Diagram 75]

To assign substitute Approvers for individual folders:

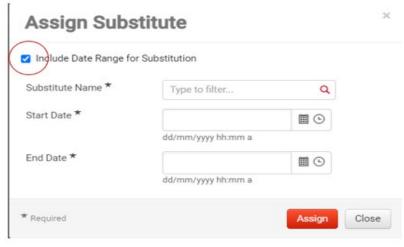
- **Step 1.** First you will need to select the check box next to the appropriate cost centre folder.
- Step 2. Then from the drop-down select Assign Substitute to Selected Folders

ŵ						All 🔻	Search (Alt+Q)	٩	0.00 CAD	e 🗢 🍋	1
	Orders + Approvals + Assign Substitute Approve	rs-Requisitions								0	
7	JAGGAER revised its Service Privacy Pol	icy effective M	ay 25, 2018. By closing this banner,	; you acknowledge that when you	use our Solution, we process your personal information as	described i	n our Service Privacy	Policy.		C+	×
							Assign Substitute	o All Invoice	s Folders End 5	0	0
0			Showing 1 - 1 of 1 Results		All Folder Results			Y	-	Substitute	TABLES -
	Search Details	•	Results Per Page 20 🗸		Sort by: Folder name ascending 🗸			K	Assign	Substitute to Select	ed Folders
m				Folder Name	Approver			Substit	-	000	0
m	Filtered by		My Invoice Approvals		Test Test21					Assign	
ш	Type: Invoices										
	Refine Search Results										
	Туре										
	Invoices 🗸										
	Approver										
	Test Test21 (1)										

[Diagram 76]

[Diagram 76]

- **Step 3.** Select the checkbox. **Include Date Range for Substitution**.
- **Step 4.** Type the assignee's name into the search popup box, as you type, the system will look for a match. Click on the best match for the name you typed. *[Diagram 77]*
- **Step 5.** Once you have a match click **Assign.**



[Diagram 77]

The selected substitute will be indicated in the **Substitute** column. *[Diagram 78]*

Showing 1 - 1 of 1 Results	All Folder Results	5		Substitutio	on Actions 👻
Results Per Page 20 🗸	Sort by: Folder name a	ascending 🗸		Rage	1 of 1 🕨 ?
Folder N	lame Approver	(Substitute	Action	
My Invoice Approvals	Test Test21	Jeffrey Sperling)	Remove	

[Diagram 78]

G. Ending Substitutions

If you did not set a date for the end of your substitution, you have to end it manually.

To end a substitution that is applied to all of your workflow (cost centre) folders, click the **End Substitute for All Folders** button.

To end a substitution for a <u>specific folder</u>, click the **Remove** button in the **Action** column. *[Diagram 79]*

			AI •	Search (Alt+Q)	٩	0.00 CAD		♥ №	0
Orders Approvals Assign Substitute Approve JAGGAER revised its Service Privacy Police	senegulations isy effective May 25, 2018. By closing this banner, you acknowledge that	at when you use our Solution, we process your personal information as	described in	n our Service Privacy	Policy.				
				Assign Substitute	to All Invok	es Fold ars Er	nd Substi	itute for All In	woices Fold
	Showing 1 - 1 of 1 Results	All Folder Results						Substituti	ion Actions
Search Details	* Results Per Page 20 V	Sort by: Folder name ascending 🐱						Page	e 1 of 1 🕑
Filtered by	Folder Name	Approver		Subs	titute			Action	0
Type: Invoices	My Invoice Approvais	Test Test21	Jeffrey Sp	erling			(Remove)•
Refine Search Results									
Туре									
Invoices 🗸									
Approver									
Test Test21 (1)									
Substitute Jeffrey Sperling (1)									

[Diagram 79]

H. Adding a Comment

- **Step 1.** To add comments to a PR, open the PR and click the **Comments** sub-tab.
- Step 2. Click the (+) to Add Comment. [Diagram 80]
- **Step 3.** The **Add Comment** overlay window displays. From this window, you can determine who will be notified via email of the comment, enter a note, and attach one or more supporting documents (if applicable).

- Step 4. Enable the checkboxes for the users that you would like notified of the comment via email. For example, if you are an Approver, you would probably like to notify the Requisitioner. If you are a Requisitioner responding to a comment, you may want to email the Approver. Click the Add Email Recipient... link to find other Sm@rtBuy users to copy via email.
- **Step 5.** Enter the note / comment in the text box. Max characters are 1000.
- **Step 6.** If you would like to attach a file (e.g. email) or a link for a URL, choose the **File Type**, enter the **File Name** (for reference purposes later), and click **Browse** to select the file.
- **Step 7.** Click the ✓ button to save the comment and attachment. The appropriate parties will be emailed.

Once the comment has been added, the number of comments for the PR will display in parenthesis on the comments tab.

Note: An attachments tab is now available on the PR. If an attachment was added via a comment, the attachment will reference the comment and will also display the number of comments on the tab.

After the comment is submitted, a history can be found in the **Comments** tab. Users can reply directly to a comment by clicking the **Reply to** button, as shown below.

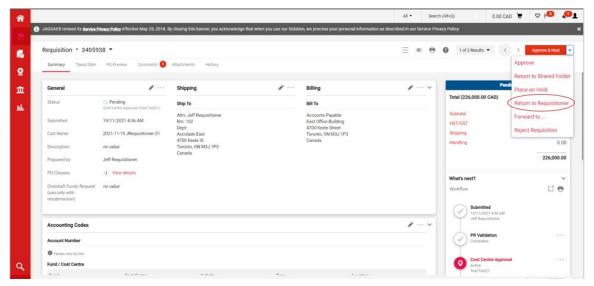
Summary Taxes/S&H PO Preview	Comments 1 Agachments History
Records found: 1	Show comments for Requisition
ADD COMMENT	
	This will add a comment to the document. If you select a user they will receive an email indicating comment has been added to the document.
	Email notification(s) Add recipient Jeff Groves (Approved) <jeffgroves@grovesandcompany.com></jeffgroves@grovesandcompany.com>
1000 characters remaining	expand I clear Jeff Requisitioner (Prepared by, Approved) <dkrishnani@grovesandcompany.com> Test Test21 (Approver) <trggoodnight@hotmail.com></trggoodnight@hotmail.com></dkrishnani@grovesandcompany.com>
1000 characters remaining	
1000 Characters Lethanmy	Attach file (optional) Attachment Type File File Name

I. Returning a Requisition

Access the purchase requisition. The requisition must be open in order to perform this function.

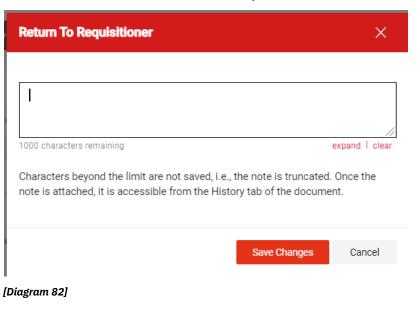
- **Step 1.** Follow Steps 1 & 2 under the **Standard Approval Process.**
- **Step 2.** From the **Available Actions** drop-down box in the upper righthand corner, select **Return to Requisitioner**.

[Diagram 81]





Step 3. From the overlay window display enter the Reason for the Return. [Diagram 82] The note will be available via the Comments tab and will be sent in an email to the Requisitioner.



The Requisitioner can access the requisition from the **Action Items** menu on the home page on the top right hand side of the page, where **Returned Requisitions** are listed in the **My Returned Requisitions.** From there, they can be opened, updated and resubmitted.

J. View Approvers

- **Step 1.** Open the PR document.
- **Step 2.** You will be able to locate the workflow on the right, scroll down on workflow to view the PR approvers.
- **Step 3.** Double click on the workflow name to view the approver under the workflow. *[Diagram 83]*

					∃ ⊛ 🖶	Ø 1 of 2 Results ▼ < >	Approve & N
Summary Taxes/S&A	PO Preview Comments	Attachments History					
General	ø	Shipping	ø	Billing	1	What's next?	
Status	Cost Centre Approval (Test Test21)	Ship To		Bill To		Workflow	Ľ
Submitted	19/11/2021 4:36 AM	Attn: Jeff Requisitioner Rm: 102 Dept:		Accounts Payable East Office Building 4700 Keele Street		Submitted 19/11/2021 4.36 AM	
Cart Name	2021-11-19 JRequisitioner 01	Accolade East 4700 Keele St		Toronto, ON M3J 1P3 Canada		Jeft Requisitioner	
Description	no value	Toronto, ON M3J 1P3 Canada				PR Validation	
Prepared by	Jeff Requisitioner						
PO Clauses	1 View details					Cost Centre Approval Active Test Test21	
Overdraft Funds Reques (use only with resubmission)	t no value					Pending Approval Group	
resubmission)						Test Test21 trggoodnightgihotmail.com	
Accounting Codes					ø v	Pending Approval Group Test Test21	
Account Number						triggoodnightgihotmail.com Pending Approval Group	
						Test Test21 ●	

[Diagram 83]

IT REVIEWER



IT reviewers have the same access as a Requisitioner, plus they will:

- Assist all Sm@rtBuy users with IT purchases.
- Help ensure that IT internal policies and procedures are followed in regards to asset management, support, warranty, etc. by approving the requisition accordingly.

Follow the same step as approving a Requisition under the Approver role section of the manual, once you have reviewed the purchase requisition.

CONTACT INFORMATION

For assistance please contact the Sm@rtBuy eProcurement Administrator at smartbuy@yorku.ca

For more information visit the Sm@rtBuy website at http://smartbuy.info.yorku.ca