1.1. Overview

The WUSTL Marketplace is a web-based electronic requisition purchasing program.

Washington University has contracted with SciQuest, the leading provider of electronic procurement solutions for higher education, to develop this program to interface with our financial system. The Marketplace will provide:

- a web-based requisitioning tool using on-line supplier catalogs and a "shopping cart" format
- ability to have staff that submit paper or email requisitions to create and submit electronic requisitions
- ability to eliminate redundant requisition data entry and reduce associated errors with a manual process
- searchable supplier catalogs providing product details and contract pricing
- ability to shop and compare items within the hosted supplier catalogs
- order acknowledgement and status via emails
- order history information
- ability to create "favorites" list for frequently ordered items

The program is customized to interface with the University’s financial system. Current business rules and budget controls will remain in place.

1.2. Roles

Shopper – a person that initiates an order by creating a shopping cart requisition, but typically does not access AIS to create purchase requisitions. (Lab researcher, etc.)

Reviewer – a person that approves a requisition within Marketplace but typically does not access AIS (Lab supervisor/PI). *Note: This is an optional function, as not all departments have this requirement.

Requisitioner – a person that historically entered the order in AIS. This person can also serve as a departmental shopper.

1.3. How do I find vendors in Marketplace

All vendors that are active in AISystem are available in Marketplace. There are 3 ways to shop different vendors.

Hosted catalogs are contained within Marketplace and can be used for a generic search when either the specific supplier is unknown or the shopper wants to search and compare items from multiple sources.

Punch-out catalogs link directly to Wash U/Supplier-specific sites and is used when the shopper knows the supplier and wishes to use the extra functionality of the supplier’s punch-out site.

Non-Catalog vendors – Vendors that do not have a punch-out or hosted catalog. The employee keys in all information about the items being ordered. Note: See the Quick Reference guide that is located in the Marketplace Help link on the Marketplace profile page.

1.4. Rules

- Must have a current employee/non employee relationship with the University
- Marketplace will be accessed by using a Wustl key and Wustl key password
- Anyone can shop, but only a Requistioner (one that can enter POs in AISystem) can push the Purchase Order to AISystem
- All purchase orders (except Blanket Order and Lease Maintenance) are currently entered in Marketplace.
- The DCM flag must be selected if ordering animals and RAM flag needs for radioactive orders.
- Only 1 vendor can be listed on a Purchase Order

1.5. Logging into Marketplace

From your AISystem home page – click Main Menu > Marketplace > Profile or Marketplace.wustl.edu

1.6. Profile page

The Marketplace Profile page displays information from the HRMS and AISystem databases. The system initially displays 3 tabs, but will display additional tabs if the department is participating in the University’s Hazardous Chemical Tracking program or if the RAM order flag is clicked. The fields on these additional pages must be completed in order for those types of orders to advance properly through Marketplace.
The table below defines the fields on the Profile page.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Empl ID</td>
<td>The employee’s 6-digit employee ID from HRMS</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the employee launching Marketplace</td>
</tr>
<tr>
<td>Email Address</td>
<td>This pulls the email address from HRMS – can be changed if applicable</td>
</tr>
<tr>
<td>Phone number</td>
<td>Pulled from HRMS – Can be changed if applicable</td>
</tr>
<tr>
<td>Fax #</td>
<td>Complete with your 10 digit fax number if applicable</td>
</tr>
<tr>
<td>Shopping Dept</td>
<td>This defaults to the department that is on your job – can be changed if applicable. Requisitioners– this should be a department for which you have PO entry in AlSystem.</td>
</tr>
<tr>
<td>Shop For RAM Flag</td>
<td>Click this flag if you are shopping for Radioactive Materials. Another page will display that will require you to list the Authorized User of the RAM materials and the location that they will be stored.</td>
</tr>
<tr>
<td>Chemical Flag</td>
<td>Shoppers: Click this flag if your department is participating in the hazardous chemical tracking program and you are purchasing chemicals. Requisitioners – This flag will be checked automatically for you if your department is participating in the Hazardous chemical tracking program. Click on the Chemical Information page tab and verify the Authorized person and location are listed.</td>
</tr>
</tbody>
</table>

Note: This detail is pulled from a table. Required fields must be completed before the PR can transfer to AlSystem.

Marketplace Help        | This hyperlink contains quick reference guides to assist you during your shopping experience. |
Ship to                 | This is your ship to department. The system defaults based on the shopping department. You can use the magnifying glass to select a different ship-to address. |
Room/Attn line          | This is a required field and must be completed by the dept. |
Go to Marketplace button| Clicking this button launches Marketplace and the shopping experience begins. |
Marketplace Roles        | This table displays the Marketplace roles for which the user has security. |

1.7. Accessing Marketplace

Click on the Go to Marketplace button. The Home/Shop page displays along with vendor stickers for the Hosted and Punch-out vendors.

This page can be divided into 4 sections:

Section 1 – Top Menu Bar

The View My Profile hyperlink, located in the dropdown with user name, allows the user to set up email preferences, account code favorites and approvals through emails for review.
The drop-down search box displays when you click on the looking glass icon on the far right-hand side of the top of the page allows the user to limit their searches 6 different ways. In addition, the user can retrieve a PR or PO and copy this to create a new document by using the copy to new cart in the action bar that displays below the top tool bar.

Section 2 – Side Menu Bar
There are 8 Icons on the left side bar, clicking on them display different information.

Section 3 – Hosted and Punch Out Catalogs
The third section is where the catalogs (hosted and punch-out) display. There is a square box in the upper right-hand corner of the vendor sticker to assist you in identifying the punch-out vendors.

Section 4 – Message Board
The message board is maintained by Purchasing. It contains news about upcoming events and new changes happening in Marketplace.

1.8. Creating Favorites

There are several ways to save your favorite items in Marketplace. You can save favorites from the hosted or punch-out catalogs or from a non-contract suppliers (non-catalog). However, it is strongly recommended that if you are using a punch-out catalog, you should save your favorite items in the supplier punch-out. This insures that the pricing and description information is always accurate.

Marketplace allows you to create favorites from a punch-out catalog or a non-catalog supplier in your favorite’s folder. However, be cautioned that the pricing information may become outdated. Pricing information for “favorites” created from the hosted catalogs is dynamic and will update as the catalog pricing is updated.

1.9. Shopping using a Punch-out vendor

Once you have launched Marketplace, click on the punch-out vendor sticker that you want to shop from. The system will leave Marketplace and advance to the vendor’s website.

Note: Navigation and the shopping experience may change for each vendor because you are on their website. Once you have finished shopping and taken the necessary steps to check out, the shopping cart will integrate back into Marketplace.

The system assigns a Draft Requisition number at the top of the page. This will become the PO document number. Follow these steps to complete the information on this shopping cart.

1. Complete the Cart Name and or the Description field with something that makes sense to you. This will allow you to find the cart at another time. The department/lab information can be adjusted if applicable by clicking on the hyperlinks by that field.

2. If this should be a Telephone Order - TO (one that does not go to the vendor) use the Select from profile values hyperlink to adjust. Internal or Supplier notes can be added in this section.

Order Type
Selected from profile values...
Clear selected value...
Request Requires Check to be mailed?
Internal Note
Supplier Note
3. Click the **Proceed to Check out** button and the system will advance to the Requisition Summary page. If you are a shopper, you can click the **Create Requisition** button which is located in the Upper Right-hand corner of the page and you are finished.

4. **1.10. Shopping using the hosted vendors**

You can shop a specific vendor by clicking on their name in their sticker. A search box will display that will allow the user to enter item information (description, sqn number, etc). If the user clicks on the Search box, the system will advance to the vendor’s catalog to allow a more in-depth search.

A second way that you can search all vendors is by using the Shop everything search bar at the top of the page.

The system will search all vendors (hosted and punch-out) for that item. It will display the results below the search box and display filters on the left that you can use to further limit your search.

**1.12. Entering Account Codes at the header level**

The header level is located in the Accounting Codes section and is usually used if all or a majority of the items are being charged to the same account. This section can be accessed two ways – by scrolling down the requisition or by clicking on the ‘Accounting Codes’ tab. **It is imperative that the correct format be used when entering account information.** Please follow this format when entering your account information – the fields marked with * are required:

- **Ledger Class** – 2 digits
- **Department Fund** – six (6) digit department number, a space, and the five (5) or six (6) digit fund number if applicable.

**Note 1:** There is no hyphen between the department and fund number.

**Note 2:** Zero funds are not allowed in this field

- **Subclass/object** – complete with the appropriate four (4) digit combination.

**Note:** No spaces or dashes are used in this field.

- **SR code** – two (2-6) alpha, numeric or alpha/numeric characters - (if applicable). If using alpha characters, they must be in upper case.

- **Zero fund** – five (5) or six (6) digit fund number if applicable

Click save once all account information is entered. The edit button can be used to open the fields back up.

**1.13. Entering accounts at the item level**

If you have an item that has to charged to a different account than is listed at the header level, you can enter the account at the item level. Clicking on the ‘Accounting Codes’ section that is located at the top of the PR makes it easier to get to each item.

This will advance the user to the ‘Accounting Codes’ section.

**1.11. Completing the PR as a Requistioner**

The account information fields have to be completed before the PR can be pushed to AISystem. There are two ways to enter this account information – the header level or the item level.
To enter accounts at the item level, click on the ‘edit’ button in the lower-right portion of the item. This will open the account fields up for editing. Follow the same criteria for entering accounts at the header level. Once finished, click the Create Requisition Button located at the top of the page.

1.14. Viewing the PR after it has been submitted.

There are several ways you can view the PR after it has been submitted.

1. When you click the Create Requisition button, the page below displays. You can click on the view hyperlink and the PR will display.

   ![Congratulations! You have successfully submitted your request. If you need to view or print a copy, click Quick View or view its status on the Approvals Tab.](image)

   Here is a summary of the request. You can also retrieve this request at any time via the document history search page.

   - Requisition number: 34678947
   - Requisition status: Pending
   - Cart name: 123-0987654321
   - Requisition date: 12/11/2022
   - Requisition type: Item
   - Requisition number: 26.13 USD
   - Number of line items: 2

   What would you like to do next? Here are links to some common actions.
   - Search for another item
   - View order history
   - Check the status of an order
   - Return to your home page
   - Create new draft cart

2. Click on the Shopping Cart Icon select My Carts and Orders, and then View My orders (Last 90 Days) to view your requisitions.

3. You can use the Search for drop down box located in the upper right hand corner. Click the looking glass icon to open up the quick search feature.

1.15. FAQ

Q. How do I enter multiple accounts to charge my item?
A. This is done by using the Add Split hyperlink located in the Account codes section either at the header level or the item level.

There are 3 ways to split the charges at the header level and 4 ways at the item level.

Q. Can I change the color of My Marketplace?
A. Yes, you can find the instructions at Purchasing.wustl.edu > Marketplace.

Q. Where can I find other quick reference guides?
A. Go to the Marketplace.wustl.edu or Marketplace profile page and click on the Market place Help hyperlink or

   ![Marketplace Help](image)

   Production Website address: https://aisinfo.wustl.edu/ps.html

   FIS Help desk: 314-935-5707
   Purchasing Services: 314-935-5649