End User Basics Guide

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Section 1: Accessing KnightSource

KnightSource can be accessed from myGeneseo at https://my.geneseo.edu or by going to the following site: https://www.geneseo.edu/purchasing/knightsource

To sign into KnightSource you will use your Geneseo user ID and password.

If you are accessing KnightSource for the first time, please make sure you have reached out the Purchasing department first to make sure you are set up with the correct access.

Section 2: Site Navigation

In Appendix A: Site Navigation Overview, there is a detailed guide that focuses on navigating the site and the main menu options. It is strongly encouraged that all users review this guide to get a better understanding of navigating the KnightSource main screen.

Section 3: Ordering Overview

There are three ways to create orders in KnightSource. Users can submit a catalog order, non-catalog item order, and an order using a form. This section will provide detail on these different order types so users can have a better understanding of what they are and which order type to use.

- The first step is determining if the items you need to purchase are available with one of the KnightSource eMarketplace catalog suppliers. This can be done by shopping on a Hosted Catalog, Punch-out Catalog or by using the Shop Search. Please refer to the descriptions listed below for each of these methods.
- If the items you are purchasing are either non-catalog items or services, then check to see if one of the forms listed under Special Requests on the KnightSource eMarketplace is applicable for your order. Please refer to the descriptions listed below for details on the appropriate use of each form.
- If the items or services you are purchasing are not catalog items and do not meet the form criteria, you will need to create a Non-Catalog Item order.

1. **Catalog Orders** - A catalog is a supplier's product offering. There are two types of catalog, hosted and punch out. These are described below.

   A. Hosted Catalog – In simplest terms, a hosted catalog is an online version of a supplier's printed catalog. Hosted catalogs contain product data and details, along with pricing information for each item. When a product search is performed, the products in all of the hosted catalogs are searched. Hosted catalog search results contain product information from all suppliers depending on the search criteria entered by the user.

   B. Punch-out Catalogs – Punch-out catalogs are integrated external links to a supplier's web based catalog. The user exits the application to search and select products from a supplier's

web catalog, then returns the items to the JAGGAER shopping cart. The selected items are then submitted through the standard requisition/order process.

C. **Shop Search –** On the Shopping home screen, there is a search field at the top of the screen that lets you search all Hosted Catalogs and some Punch-out Catalogs. This is a good tool to use if you would like to search multiple supplier catalogs at once. For some Punch-out Catalogs you will see "Order from Supplier" where the price should be in the search results. For these items, you will need to click on that to be directed to the Supplier's Punch-out site to see the pricing.

2. **Non-Catalog Item Orders –** A non-catalog item order is an order for goods or services where there is not a catalog available in KnightSource for these goods or services.

3. **Forms –** Forms assist users with collecting the necessary information for specific types of orders or payments. Please see below for descriptions on the different types of forms available in KnightSource.

A. **Standing Order Request –** This form is to establish an account with a supplier to obtain specific goods and services during a set period of time with agreed upon pricing.

B. **Trademark Materials Request –** This form must be used for any requests involving Campus logo imprinted materials. This includes; apparel, signage, banners, giveaways, exact reprints etc.

C. **Payment Request –** This form is used for payment of goods or services that have been received without an existing Requisition or Purchase Order. Four different payment types can be used for this form and are described below.

a. **Supplier Payment –** A supplier payment is for rare circumstances for payment of goods or services that have been received without an existing Requisition or Purchase Order. As a reminder, New York State procurement regulations require that a purchase order be issued prior to the delivery of goods or services. All supplier payment submissions must comply with all OSC, State, RF, and University policies and procedures.

b. **RF Reimbursement –** This payment type is used for Research Foundation funded, employee reimbursements only.

c. **Advance Payment –** This payment type is to be used exclusively for memberships, subscriptions and event registrations where the supplier requires advanced payment in full.

d. **Direct Pay** – This payment type is to be used exclusively for transactions such as utility payments and teacher stipend payments that do not go through the Procurement office.

D. **Honorarium Request –** This form is used for payments to lecturers, guest speakers and performing artists performing a service related to our academic program. Honoraria are for

short-duration service (usually just one day, but not to exceed four consecutive days) and relatively small dollar amount (generally under $1,000). An honorarium is an ex gratia payment (i.e., the College has no obligation or liability to pay it); honorarium payments may not be used for the services of an independent consultant or independent contractor. Payee must be an individual (not a business entity) and payee cannot be a NYS employee. An Honorarium Request Form and W9 must be attached to this form.

Section 4: Shopping a Hosted Catalog

1. When purchasing through Hosted Catalog vendors, you search for the items directly in KnightSource.

2. Click on a Hosted Catalog vendor's name. (You will know a vendor is Hosted Catalog if a search box displays when you click on the vendor name.) Alternatively, type the number or name in the Shop search box at the top of the page and click the Search icon. (This will allow you to search multiple catalogs

3. In the search box that pop ups, type the part number or item name and click the Search icon.

4. You can filter the search results by using the Filter Results on the left of the screen.

5. For the item you would like to purchase, enter the quantity needed and click “Add to Cart.”

6. Continue to search for and add any other items needed from that supplier and then go to your cart by clicking the shopping cart icon at the top of the page and then click “View My Cart.”

7. Note: For hosted catalog (and punch-out) purchases, do not add a Non-Catalog item to your cart.

8. You should then assign a name to your cart at the top of the screen (Next to the word Shopping Cart it defaults your cart name to your user name and the date. It is recommended that you replace this with a brief order description to help identify the order later on. i.e. February 2021 Office Supplies) and then continue with your order. Click “Assign Cart” if you need to assign the order to someone else to complete the order or click “Proceed to Checkout” if you are ready to complete the order by turning the cart into a purchase requisition.

Section 5: Shopping a Punch-out Catalog

When purchasing through Punch-out vendors, you will be redirected to their website, where you will create your cart, and then when you checkout of that website, you will return to KnightSource. Back in KnightSource, the items added at the vendor's website will be in one KnightSource cart.

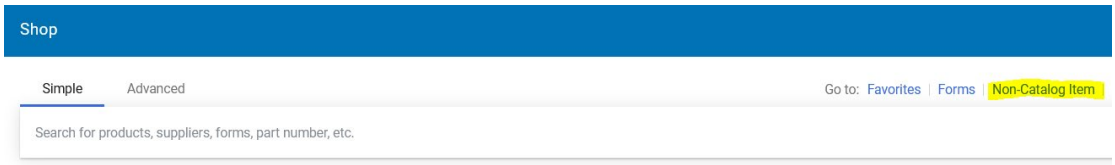
It is important to note that a single KnightSource cart cannot mix contract and non-contract items, so once back in KnightSource, be sure to check that your cart only has one type of item.

1. On the Shopping home page, click on a punch-out supplier's icon.
2. Create your order at the vendor's website and click "Checkout or Submit" (appearance/wording of supplier websites will differ).
3. Back in KnightSource, carefully look at all lines to be sure each has a contract number. If any items do not, check the box to the right of the item and then click the 3 dot icon (…) next to it. From there, select "Move to Another Cart" (which will then need to be processed in the separate cart, see step 6).
4. Note: For punch-out (and hosted catalog) purchases, do not add a Non-Catalog Item. These need to be done on a separate order.
5. Once all items either have a contract number or don't, you should then assign a name to your cart at the top of the screen (Next to the word Shopping Cart it defaults your cart name to your user name and the date. It is recommended that you replace this with a brief order description to help identify the order later on. (i.e. February 2021 Office Supplies)). Click "Assign Cart" if you need to assign the order to someone else to complete the order or click "Proceed to Checkout" if you are ready to complete the order by turning the cart into a purchase requisition.
6. If any items were moved to another cart (in step 3), navigate to the draft shopping cart and then continue with that cart by proceeding with steps 4 and 5.

Section 6: Ordering a Non-Catalog Item

Before placing a non-catalog order, always search for the product using Shop Search as this is the only way to ensure contract pricing. If you do not find the item, place the order as non-catalog as follows:

1. Click "Non-Catalog Item" from the Shortcuts options on the home page.



2. In the Non-Catalog Item pop up window, enter the supplier by either typing the name and then selecting from the options or clicking the search icon and selecting the supplier there. If the supplier you wish to use cannot be found, you <u>must</u> type and select New Supplier as the supplier.
3. A default address Fulfillment Address (PO Address) will be assigned. You may select a different fulfillment address if desired. Procurement Services will be reviewing and editing fulfillment

addresses for these orders. Please note that addresses that start with an S are State addresses and addresses that start with a 190 are Research Foundation (RF) addresses.

4. You may also enter a Distribution Method (fax or email address where the PO should be sent). This may already have a default distribution method that has been previously set up. Again, Procurement Services will be reviewing and editing distribution methods for these orders.

5. Complete fields as follows:

    A. Description: enter a detailed product description of the goods or services.

    B. Catalog No: enter catalog number, if applicable.

    C. Quantity: enter how many units.

    D. Price: enter price.

    E. Packaging: enter unit of measure. **Please note:** If you are submitting an order for a service that may include multiple payments against one line, you <u>must</u> select USD as the unit of measure.

    F. Check boxes for any relevant features, if applicable (e.g., Recycled, Hazardous Material, etc.)

6. Click "Save and Add Another Line" to add any additional items (up to a total of 39 items). Users must enter each separate item as a separate line (This includes any shipping costs, if applicable.).

7. When finished adding items, click on "Add Internal Attachments" and then click on "Select Files." You should select and attach all necessary attachments (i.e. quotes, justifications, back-up documentation, etc.) and then click "Save Changes." Note: If attaching multiple quotes or different files, it is helpful to Procurement if these files can be attached as separate documents when possible.

8. Click "Save."

9. Click the "shopping cart icon" at the top of the page and click "View My Cart."

10. You should then assign a name to your cart at the top of the screen (Next to the word Shopping Cart it defaults your cart name to your user name and the date. It is recommended that you replace this with a brief order description to help identify the order later on. (i.e. February 2021 Office Supplies)).

11. Click "Assign Cart" if you need to assign the order to someone else to complete the order or click "Proceed to Checkout" if you are ready to complete the order by turning the cart into a purchase requisition.

Section 7: Ordering using a Form

Before placing an order using a form, please review Section 1: Ordering Overview to make sure the appropriate form is being used in the correct way. Once you have determined that a form is the appropriate way to place your order, use the instructions below:

1. Select the appropriate form and follow the instructions while entering information for all of the required fields. If a form requires attachments, you must include the required attachments by clicking on the Add Attachments button. If a supplier cannot be found, you must enter "New Supplier" as the supplier name.

2. Once all sections of the form are complete, scroll to the top of the form and select "Update" from the Available Actions dropdown and then click on "Go."

3. After that, select "Complete Form and Go To Cart" from the "Available Actions" dropdown and then click on "Go."

4. Click the "shopping cart icon" at the top of the page and click "View My Cart."

5. You should then assign a name to your cart at the top of the screen (Next to the word Shopping Cart it defaults your cart name to your user name and the date. It is recommended that you replace this with a brief order description to help identify the order later on. (i.e. February 2021 Office Supplies)).

6. Click "Assign Cart" if you need to assign the order to someone else to complete the order or click "Proceed to Checkout" if you are ready to complete the order by turning the cart into a purchase requisition.

7. If you forgot to include any required information on the form, you will be prompted with an error message at the top of the Requisition screen after you click "Proceed to Checkout." If you click on the error message it will take you back to the form and highlight any required fields that were left blank. Once all sections of the form are complete, scroll to the top of the form and select "Update" from the "Available Actions" dropdown and then click on "Go." Then click "Close." The error message referencing the form should be gone.

Section 8: Assigning a Cart

End users can either assign their carts to other users or proceed to checkout to complete their order. An end user may want to assign their cart to another user for a few reasons. The most common being the end user does not know what account to charge the order to. When applicable, end users should make sure all necessary documentation has been attached before assigning a cart to another user. Follow the steps in this section to assign a cart to another user.

1. In your shopping cart, click the "Assign Cart" icon.

2. Click on "Search."

3. Use the “Last Name” field to enter the user’s last name and then click on “Search.”

4. Click on the plus icon for the user you wish to assign the cart to.

5. If you regularly assign carts to this user, you may select the “Add to Profile” box. Otherwise, add a note to the user in the “Note To Assignee” field to provide detail to the end user on why you are assigning this cart to them.

6. Click “Assign.”

7. The cart has now been assigned to the user selected and they have been notified.

If someone has assigned you a cart, you should receive an email notification. The email should contain comments from the user on why they assigned you the cart (usually to add an account number). Either click on the link in the email or copy and paste it into your web browser. Once at the requisition, you may need to activate your cart and then you should now be able to add an account number and any other needed information to complete the order.

Section 9: Purchase Requisitions Navigation and Overview

Once you click Proceed to Checkout on your Shopping Cart, you will be brought to your purchase requisition. The purchase requisition is broken down into many sections. Below is an overview on each section. To edit any information in any of the sections, click the pencil (edit) icon. If any required information is missing (i.e. account number) from one of the sections in the requisition, the system will alert you to correct these fields in the upper right corner of the requisition. You can click on these messages to directly take you to the area of the requisition that needs to be corrected. Once the sections below have been reviewed and the necessary information has been included with the purchase requisition, users can click on “Place Order” to submit their purchase requisition.

1. **General** – The General section would be used to change the “Prepared for” field. The “Prepared for” field is the user whose name will appear on the purchase order to have questions directed to. It will also be the user who will get email notifications to acknowledge receipt of the order, when applicable. To change the “Prepared For” user, click on search icon for this field and search for the user you would like to have in this field. You can also use this section to update your cart name if you haven’t already done so.

2. **Shipping** – The Shipping section is where the order will be shipped. This field is automatically defaulted to be Central Receiving. This shouldn’t need to be changed unless you are placing an office supply order with Gholkars. If so, you will need to click the edit icon on the Shipping section. There will be a pop-up screen that has a listing of the available Ship To addresses. Select “Geneseo-DesktopOffice Supplies” and then enter your Building and Room number. Once entered, click on “Save Changes.”

3. **Billing** - The Billing section is where the order invoice will be sent. This field is automatically defaulted to the Accounts Payable office for the funding source (State or RF) that the user has access to. This section should never be used unless you are a user who has access to State and Research Foundation funds. If you are one of these users, the Bill To address should be defaulted to the office where you have most of your spend. If you are placing an order with your other funding source, you will need to click on the edit icon in the Billing section. There will be a pop-up screen that has a listing of the available Bill To addresses. Select "Geneseo – BillTo – State" or "Geneseo – Bill To – RF" depending on what funding source you are using. Once entered, click on "Save Changes."

4. **Purchasing Information** – This section is used by the Purchasing and Accounting departments only.

5. **Accounts Payable Use Only** – This section is used by the Accounting department only.

6. **RF Approval Certification** – This section is for RF orders only and is just a statement certifying that approval of this order certifies exclusive scientific or programmatic use for the project charged.

7. **Accounting Codes** – The Accounting Codes section will almost always need to be completed. This is where you assign the account number(s) that you wish to charge the order to. Click on the "Edit" icon in the Accounting Codes section to select the account codes. For most users, some of the fields in the Accounting Code section will default and the system will highlight any required fields that still need to be entered (i.e. Account-SUNY for State order or Project, Task, Award for RF orders). If you need to change any of the fields, click the arrow icon in the field to search for the information needed. You can then click on "Search" under Organizational Values in order to search for the needed account number.

   If you need to split the order between multiple accounts, click on "plus sign" icon to the far right of the pop-up window. From there you can select from the dropdown if you would like to split the order by percentage of price or percentage of quantity (Users are encouraged to use splits by percentage of price and convert dollar amount splits to a percentage whenever possible. If a split can't be converted to a percentage, it will need to be done at the line level by clicking on each line of the requisition). Then you can enter the additional account number and the amounts you would like charged to each. If more accounts are needed, keep clicking on the "plus sign" until all of your accounts and percentages/amounts for the order are added. Once finished, click on "Save Changes."

   Users do not need to assign a UNSPSC Code or Object Code as Procurement Services can enter this during their review.

8. **Internal Notes and Attachments** – In this section, users should attach any documentation for the purchase (i.e. quotes, justifications, W-9's, etc.) that would be needed by their office, Purchasing, and Accounting offices. These attachments would only be internal, meaning that

they would not go to the supplier. Users can also click on edit in this section to write an internal note for the order.

9. **External Notes and Attachments** - In this section, users should attach any documentation for the purchase (i.e. certain quotes, forms, etc.) that would be needed by the supplier. These attachments would be external, meaning that they would go to the supplier. Users can also click on edit in this section to write an external note for the supplier.

10. **Workflow** – On the right side of the screen there is a section that shows the current and future workflow for your requisition once you place your order. Users can see where the requisition will go and who needs to review and approve it before it becomes a PO. Users can click on any of the PR Approval workflow steps to see the name and contact information for the approvers in that step.

11. **PO Preview** – This section gives a brief preview of what the PO may look like

12. **Comments** – This section is used for internal comments and to send these comments to other users on campus if needed. Click on the "Plus" icon to add a comment. This will bring up a window for you to enter your comment or message. If you would like to email this message to specific users, you need to click on the box next to the recipient listed or select "add recipient" and search for the person(s) you wish to send the comment to. Once selected, click on the boxes next to the people you wish to have the email go to. Files may also be attached to the comment if desired. Once finished, click on the "check" icon to add/send the comment.

13. **Attachments** – This section shows a summary of all attachments.

14. **History** – This shows a detailed history of every edit made to the order in the system.

Section 10: Purchase Requisition Approvals

Once a purchase requisition has been submitted, it will stop at different approval steps to ensure that all necessary parties have reviewed and approved the requisition before it goes to the supplier as a purchase order. Approvers should get an email notifying them that they have a purchase requisition to approve. In Appendix B: Approvals Quick Reference Guide, there is a guide for approvals and it's strongly encouraged that all approvers review it to get a better understanding of the approval function and what you can do. This section here will focus on the approval basics and Ad-hoc approvers, which is not covered in the reference guide.

1. When an approver receives an email notifying them that they have a requisition to review, they should click on the "View Requisition Approvals" link in the body of the email. Approvers can also click on "Documents/Approvals/My Approvals" on the home screen at any time to see if they have any pending approvals or view any action items under the "Action Items Flag".

2. On this screen, the approver should see a list of folders, separating any pending approvals by account number and possibly other workflow approval steps. You can click on the individual

folders to see the orders waiting approval. If the approver would prefer to see a list of all pending orders for approval not grouped in folders, they can select the "eye icon" on the upper right side of the screen and change the filter view to "View Details."

3. You should assign a requisition to yourself before reviewing and approving it. There are two options on how to do this form this screen. Either option A or B below is fine.

    a. Click on the "portrait icon" on the far right hand side of each requisition that you want to assign to yourself for review.
    b. Click on the box on the left hand side for the screen for each requisition that you want to assign to yourself to review. A dropdown will appear at the bottom of the screen with available actions for the selected requisition(s). Select "Assign." (This option may be more efficient is you have multiple requisitions to review.)

4. Now that the requisitions are assigned to you, click on the Requisition Number for the first order you wish to review.

5. Review the purchase requisition and make any edits if needed. (Please see Section 7 for a review on the different areas of a purchase requisition.)

6. Once your review is complete, you can click on the blue Approve button on the upper right side of the screen. If the blue button says "Approve & Next" that just means that you have multiple requisitions to approve and the system will automatically take you to the next requisition for review and approval.

7. If you would like to return the requisition to the user who created it, for them to make revisions and then resubmit, you can click the down arrow next to the approve button and you will see a choice to "Return to Requisitioner." If you don't want the order resubmitted, you can also select "Reject" from this dropdown.

Ad-hoc approvals: On occasion, approvers may have a need to add an additional approver, who is not already listed in the requisition workflow when looking at the PR Approvals section of the purchase requisition. When this happens, approvers can add an Ad-Hoc Approver by clicking on the "General" section of the requisition. In this section, there is an area at the bottom under Additional Approver that says Ad-Hoc Approver. Click on "Select" next to this area and search for the additional approver you would like to add. You can also include comments for that approver on why you are adding them as an approver for this requisition. Once finished, click on "Update" and the individual will be added under PR Approvals as an additional approver, after you approve and complete your review.

Section 11: Receiving

Central Receiving will do the receiving for all purchase orders that are delivered to the Receiving department, with the exception of Standing Order purchase orders. For other purchase order types, (i.e. services, desktop delivery office supplies, standing orders) the end user who was listed on the purchase

requisition in the General section under “Prepared for” will do the receiving for the order. The end user will acknowledge the receipt of the goods or services on the purchase order so the Accounts Payable office can pay the invoice when it comes in.

1. The user listed under “Prepared for” on the purchase requisition may get an email notification reminding them to acknowledge receipt of the order once the Accounts Payable office receives an invoice for the order. The email will list the purchase order number and the lines on the PO that have been invoiced. Users should click on the “Click here to view purchase order” link in the email. Please note that users do not have to wait for the reminder email to acknowledge receipt. Best practice would be that when goods or services are received, the end user would search for the corresponding PO using any of the options listed in Section 12 and then go to Step 2 below.

2. Once at the purchase order, click on the Receivers section at the top of the screen to verify if any receiving against this PO has already been done.

3. Click on the “plus” icon to create a new Receiver for the PO.

4. You will now be brought to the Receiver screen. On this screen, go to the Receiver Date field and select the date the goods or services were received.

5. Then scroll down to the bottom of the screen and you will see the lines on the PO that need to be received. You will need to enter the quantities or costs received depending on the PO and what fields are listed on the Receiver to edit.

6. Once finished entering the quantities, click “Complete” in the upper right-hand corner of the screen. The Receiver for this PO is now finished.

   Receiving Notes:

   If some lines have been received, but other lines have not come in yet, you should click on “Remove Line” (trash can icon) for the lines that have not been received yet.

   If you are unsure what the unit of measure is that you should be receiving, click on the “printer icon” next to the PO number on the left side of the screen to see a PO summary, which has this information.

   It is also important to know that if you accidentally duplicate a Receiver and receive the same items twice, you will need to submit another receiver using a negative quantity to remove the duplicate amount.

   If you ever need to include a comment for Accounts Payable with your Receiver, you can use the Notes section in this screen.

Section 12: Searching Order Status

There are many ways users can search for their order status in KnightSource. Below are four examples.

1. Users can search for any document status by using the "Quick Search field" on the upper right hand corner of the home screen. More information on the Quick Search field, and what you can search for, can be found in Appendix A: Site Navigation Overview.

2. Users can click on the portrait icon at the top of the screen. There could be four choices listed: My Pending Requisitions, My Recently Completed Requisitions, My Pending Purchase Orders, and My Recently Completed Purchase Orders. Click on any of these to see a list of orders.

3. Users can also use the My Requisitions section, located at the bottom of the Shopping Home screen to find their requisitions.

4. Users can click on the "Orders" main menu Item and click "Search All Orders" to search for any of their orders.

Notes:

- Once you have located the order you wish to check the status on, view the Workflow section on the right side of the screen to see where the order is.

- When you have determined where the order is, you can elect to send a comment to the individual(s) listed in that step using the Comments section to inquire about the status or ask any questions.

- If there are any related documents associated with the order (i.e. purchase requisition, purchase order, receiver, voucher) you can view them as well on the right side of the screen next to the Workflow section under Related Documents. You may click on any of these documents as well to view.

Section 13: Returned Requisitions

Sometimes requisitions may be automatically returned to the end user by KnightSource when submitted. This is usually due to one of the two reasons detailed below.

A. Insufficient funds: If your requisition is returned due to insufficient funds, you should receive an email notification from KnightSource saying that it has been returned with an insufficient funds message. You will need to determine either if a different account should be used or if an override request is needed while the account issue is being addressed. Once determined, please take the following steps to correct the issue.

1. Click on "View Requisition" in the body of the email.

2. Click on “Activate Cart” at the right side of the screen.

3. If you are going to use a different account, go to the Accounting Codes section of the requisition to edit the account number to another one. You can then click on “Place Order” to resubmit your order. If you are going to ask for an override request, click on “Assign Cart.”

4. Click on Search for an assignee.

5. Search for Jeffrey Nordland, Director of Accounting & Budget.

6. Select the assignee by clicking the “plus” icon.

7. Add a note in the Note To Assignee field to provide detail on why you are assigning this cart.

8. Click “Assign.”

9. The cart has now been assigned to the Director of Accounting & Budget who will review your request. Once reviewed, the cart may either turned into a requisition with the override approved or will be assigned back to you with approval or disapproval of the account override request. If returned, you should receive an email notification detailing whether or not the override was approved.

10. Click on the link in the email or copy and paste it into your web browser.

11. Once at the requisition, click on “Activate Cart.”

12. If a one-time account override request has been approved, you should now be able to click “Place Order” to complete the order.

B. Mix of Contract and Non-Contract Items for a Catalog order: Some catalogs in the KnightSource eMarketplace contain a mix of contract and non-contract items. Contract items and non-contract items need to be submitted on separate purchase requisitions. You can take the following steps below to fix a returned requisition due to this issue.

1. Click on “View Requisition” in the body of the email.

2. Click on “Activate Cart.”

3. Carefully look at all lines in your cart to be sure each has a contract number. If any items do not, check the box to the right of the item and then click the 3 dot icon “…” and select “Move to Another Cart” (which will then need to be processed in the separate cart, see step 5).

4. Once all items have a contract number, you can continue with your order and click “Proceed to Checkout.” Click “Place Order” to resubmit the requisition.
5. If any items non-contract items were moved to another cart, navigate to that draft shopping cart and then continue with that order by clicking on “Proceed to Checkout.” Add the necessary information to the purchase requisition and click “Place Order” to resubmit the requisition for the non-contract items.

Section 14: Notifications

KnightSource can send a variety of notifications to users. There are email notifications and internal KnightSource notifications (accessed by clicking on the Bell icon on the home screen). The most necessary notifications have already been defaulted for you to receive. With that said, some users may want more or less email notifications depending on what they feel is useful and helpful. If you would like to see what email notifications are available and how you can edit your notification preferences, please follow the steps below.

1. Click on the Portrait icon at the top of the home screen.
2. Click on “View My Profile.”
3. Click on “Notification Preferences.”
4. Click on “Shopping, Carts & Requisitions.”
5. Review the different types of notifications that are available. To get more information on what a notification is for, click on the “?” symbol.
6. If you would like to change any of your notification preferences, click on “Edit Section” in the upper right corner.
7. If you would like to turn a notification off that you are currently receiving, select “None” from the dropdown for that notification. If you would like to receive a notification for something that you currently are not receiving, click on “Override” and then select “Email & Notification,” “Email,” or “Notification” from the dropdown depending on what type of notification you would prefer to receive.
8. Once finished editing your notification preferences, click on “Save Changes.”

Section 15: Change Notice Requests

If you require a change notice to be made to an existing purchase order, please use the following steps.

1. Locate the PO in KnightSource that needs a change notice. This can be done by using any of the methods detailed in Section 12 of this guide.

2. Click on the “PO number.”

3. Click on the “Comments” section of the PO.

4. Click on the “plus” icon to add a new comment.

5. Click on “add recipient.”

6. Search for the user in Purchasing that you need to do the change notice (i.e. Kristi O’Dell). Click the “plus” icon to add the user. Please note: If you are requesting a PO increase and you do not have signing authority for the account on the PO, you must also search for and also select and include the end user who does have signing authority (i.e. department head).

7. Make sure the boxes next to the individual(s) you added are checked under Email notifications.

8. Enter a detailed message to Purchasing, describing what change you would like made to the PO.

9. If you have any back-up documentation for the change notice request, click “Choose File” to add the files.

10. Click the “checkmark” icon to send the comment.

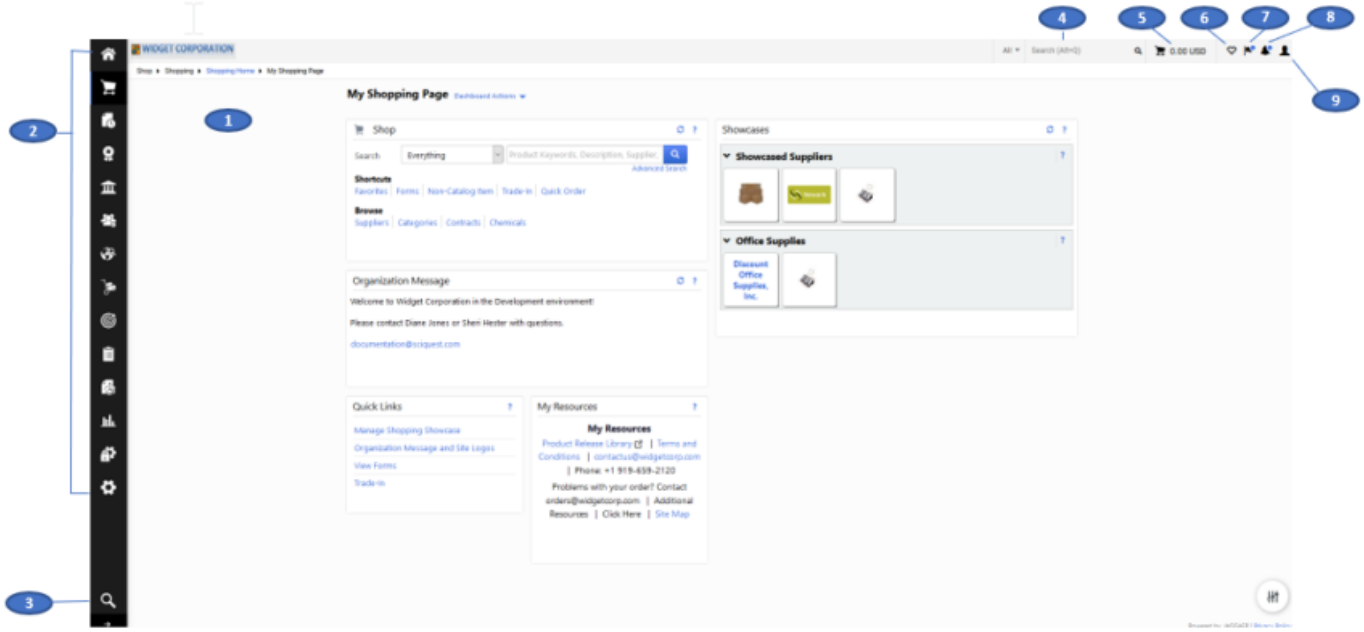
11. The Purchasing department will review the request and comment back to you with any questions.

Appendix A: Site Navigation Overview

Site Basics: Navigating the User Interface

The user interface is designed to provide a clean, intuitive user experience. The site is easy to navigate and provides several features to help you locate and manage your tasks. The menu items and features displayed are dependent on 1) the solutions your organization has purchased, 2) your role, and 3) your permissions.

NAVIGATION DETAILS…(CLICK ON AN ITEM IN THE LIST FOR A DESCRIPTION OF THE CORRESPONDING AREA OF THE INTERFACE)



1. **Homepage**
2. **Main Menu Options**
3. **Menu Search**
4. **Quick Search**
5. **Cart Preview**
6. **Bookmarks**
7. **Action Items**
8. **Notifications**
9. **Quick Search**

Site Basics: Main Menu Option Descriptions

The table below contains a description for each main menu item. Your site may not display all the following menu options. **Important Note**: Menu items displayed depend on your organization's licensed solutions, your role and/or your specific permissions. Some of the items below may not be applicable.

Menu Option	Description
	Clicking on the **Homepage** icon will return the user to the site page that is configured as the homepage.
	The **Shop** menu contains the menu options related to shopping tasks including product quick search, access to the shopping page, forms and favorites and access to carts and orders.
	The **Orders** menu provides access to document search and approval-related tasks.
	The **Contracts** menu is primarily used to access features related to the Contract Lifecycle Management solution. In addition, organizations that manage their hosted catalogs, consortia or org catalog can access those features from this menu.
	The **Accounts Payable** menu contains all tasks related to Invoicing solution, including invoice management and AP administration.
	The **Suppliers** menu contains all tasks related to the configuration and management of your organization's suppliers. JAGGAER ONE Process Flows customers - see **Site Basics: JAGGAER ONE Process Flows Navigation** for additional options.
	The **Sourcing** menu contains tasks related to creating and managing sourcing events. **JAGGAER ONE Process Flows** customers - see **Site Basics: JAGGAER ONE Process Flows Navigation** for additional options.
	The **Inventory** menu provides access to information and orders related to inventory (including chemical inventory management).
	The **Portfolio Savings Management** menu provides access to all tasks related to the Savings Management solution.
	The **Project Based Procurement** menu provides access to all tasks related to the Project Based Procurement solution.
	The **Budget Manager** menu provides access to all tasks related to the Budget Manager solution.
	Reports are accessed from the **Reporting** menu. The sub-menus are organized by report type and there is a separate sub-menu for downloading report extracts and exports. The Reports menu also provides access to the Spend Analytics (Spend Radar) solution.
	Tasks related to the administration of the site are located in the **Administer** menu. The most commonly used Administer option is user management. Other sub-menu options including shopping settings, find and fix errors, managing imports and accessing self-help tools.
	The **Setup** menu contains all tasks related to configuring the site. This includes workflow setup, hosted catalog configuration, general site settings, site appearance and behavior and user communications.
	Menu Search is a keyword search that returns a list of pages containing that keyword. Search results are clickable and take you directly to the page.

Site Basics: Managing Page Bookmarks

This feature allows you to create and access bookmarks for commonly used pages. This is useful for accessing pages quickly without having to use the menu search or navigate through the site.

Accessing the Bookmarks Menu

- Click on the **Bookmarks** icon in the top banner OR
- Use the quick-key access combination **Alt + K**

Saving a Page as a Bookmark

1. Go to the page you would like to bookmark.
2. Click on the **Bookmarks** icon in the top banner. The **My Bookmarks** menu will display.
3. Click **Bookmark this page**. The page will be saved as a bookmark. You can rename the bookmark by clicking the **Edit** button and typing over the bookmark name.

Accessing a Page from a Bookmark

1. Access the **Bookmarks** menu.
2. A list of your bookmarks will display. Locate the bookmark for the page you want to access and click on it. You will be taken to the appropriate page.

Removing, Renaming or Re-ordering Bookmarks

1. Access the **Bookmarks** menu.
2. Click **Edit**.
   - To rename a bookmark, click the icon. Type over the existing name and then click the **Done** button.
   - To remove a bookmark, click the icon to the left of the bookmark name.
   - To move a bookmark, order click and drag the icon to the right of the bookmark name to the appropriate location in the list.

Site Basics: Configuring Your Homepage

The site homepage (the page to which the site will default when the application is accessed) is configured at the organization level. However, in some situations it may be more appropriate to set a different page as the homepage. For example, if you are an administrator, you may want to the Admin Dashboard to display by default. You can set that page to be your homepage. **Note**: In order to perform this task you must have the **Set My Homepage** permission. If you do not have this permission enabled, please contact your system administrator.

Step-by-Step

1. Go to the page that you would like to set as your homepage.
2. Click on your **User** menu in the top banner.
3. Select **Set My Home Page**. An overlay displays.
4. The dialog box will contain possible selections for the homepage. Choices will include the default homepage (as set by your organization) and the current page. By default, the current page will be selected. To save the current page as the homepage, select that option, and click **Save**.

Note: The user-specific home page can also be set in the user profile in the Language, Time Zone and Display Settings section. For information about configuring this section, please see **Site Basics: Updating Language, Time Zone, Currency, and Display Settings in the User Profile**.

Site Basics: Using Quick Search

The **Quick Search** feature allows a variety of searches, such as supplier profile, user profile, etc., to be performed from anywhere in the application.

Step-by-Step

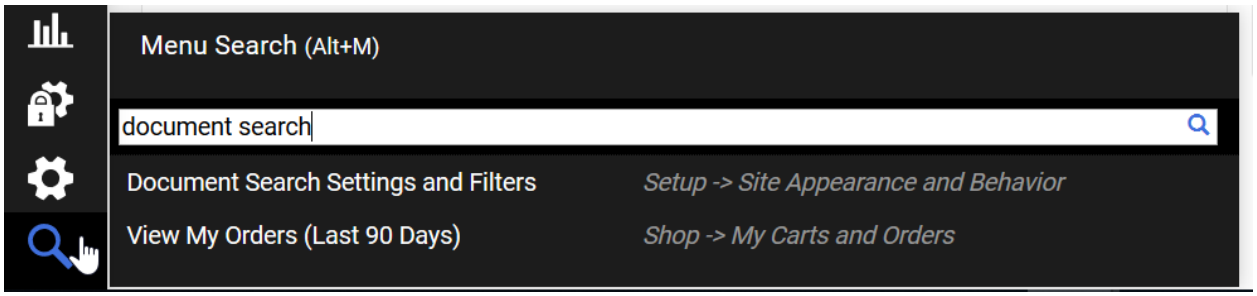
1. Access Quick Search in one of the following ways:
    - Click the Quick Search icon in the top banner.
    - Use the quick-access key combination **Alt +Q**.
2. The **Quick Search** displays. In the drop-down menu, select the type of search you would like to perform. **Important Note**: Options will vary based on your organization licensed solutions and your individual user permissions and access.
    - **All**: Select this search type to search by keyword or document number across all search types.
    - **Contract**: Select this search type to search for contracts by contract number or keyword.
    - **All Orders**: Select this search type to search ALL orders by document number or keyword.
    - **Requisitions, Change Requests, Purchase Orders, Invoices, Receipts**, **Sales Orders, Sales Invoices**: Select these search type(s) to search for a specific document type by document number.
    - **AP Requests, Procurement Requests, Contract Requests, Sourcing Requests, Budget Transfer Requests, Supplier Requests**: Select these search type(s) to find a specific request by name or number.
    - **Supplier Invoice Number**: Select this option to search for a specific supplier invoice number.
    - **Sourcing Event**: Select this option to search for a sourcing event by ID or name.
    - **Supplier Profile**: Select this search type to search for a supplier profile by supplier name or ID number.
    - **Field Display Name**: Select this search type to search for fields in Field Management.
    - **Users**: Select this search type to perform a user search by username or name.
3. After selecting the search type, enter the search term in the text field. **Note**: You must enter a term in the field in order to perform a search.
4. Click the Search icon. A list of options displayed. You can use the up or down arrow keys on your keyboard to scroll through the options.
5. Click the appropriate options. You will be taken to that area of the application.

Site Basics: Using Menu Search

Menu Search allows you to locate menu items and functions without having to navigate through the interface. This feature is useful for accessing site pages when you are unsure of the location in the navigation menu or the specific name of a menu.

Step-by-Step

1. Access Menu Search in one of the following ways:
    - Click the Menu Search icon on the side navigation bar.
    - Use the quick-access key combination **Alt + M**.
2. The **Menu Search** field displays. Begin typing the search term in the search field. A list of menus and screens that match the search term will display below the search field as you type. The display includes the menu/screen name and breadcrumbs that show you the navigation path. You can use the up or down arrow keys on your keyboard to scroll through the options.



3. Locate the appropriate menu or screen in the list and click on it. You will be taken to that screen.

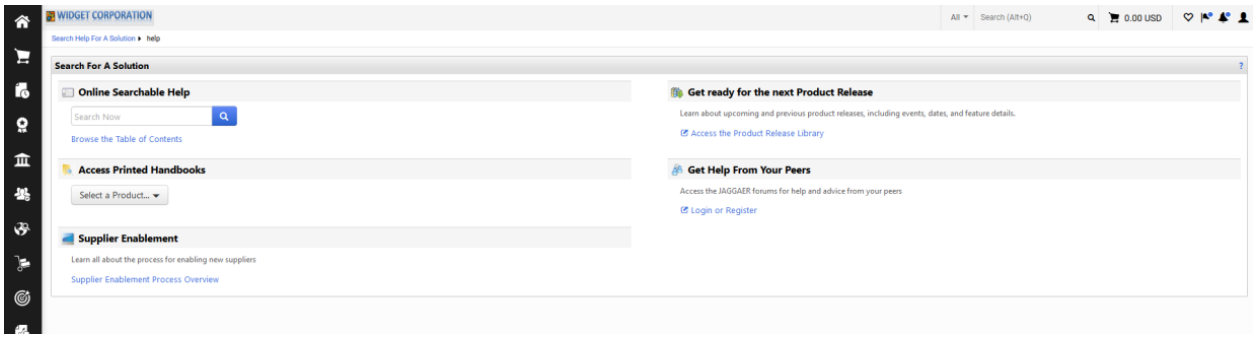
Note: Organizations have the ability to update the keywords associated with a menu option that can be matched on menu search. **The Keyword Menu Search** option is available in Field Management for each menu item. For information about accessing and updating fields in Field Management please see the **Field Management** topics.

Site Basics: Accessing Self-Help Tools

There are self-help tools available in the application including searchable help, handbooks and links to other documentation and forums. This task demonstrates how a user can access self-help tools. **Note**: In order to access this page, you will need the **Access Self-Help Tools** permission. Contact your system administrator to have the permission turned on.

Step-by-Step

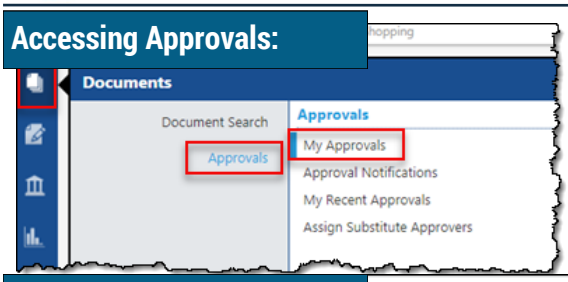
1. Access your user menu by clicking on the drop-down icon beside your name in the top banner.
2. If you have permission to access the self-help tools, select the **Search Help for a Solution** menu option.
3. Available self-help tools will be visible on the screen.



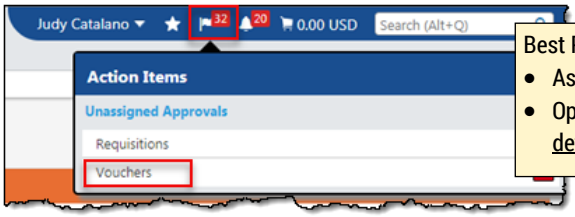
Approvals Quick Reference

Applies to all System Documents (PR, PO, Invoice, Form Requests, etc.), regardless of examples shown.

Accessing Approvals:

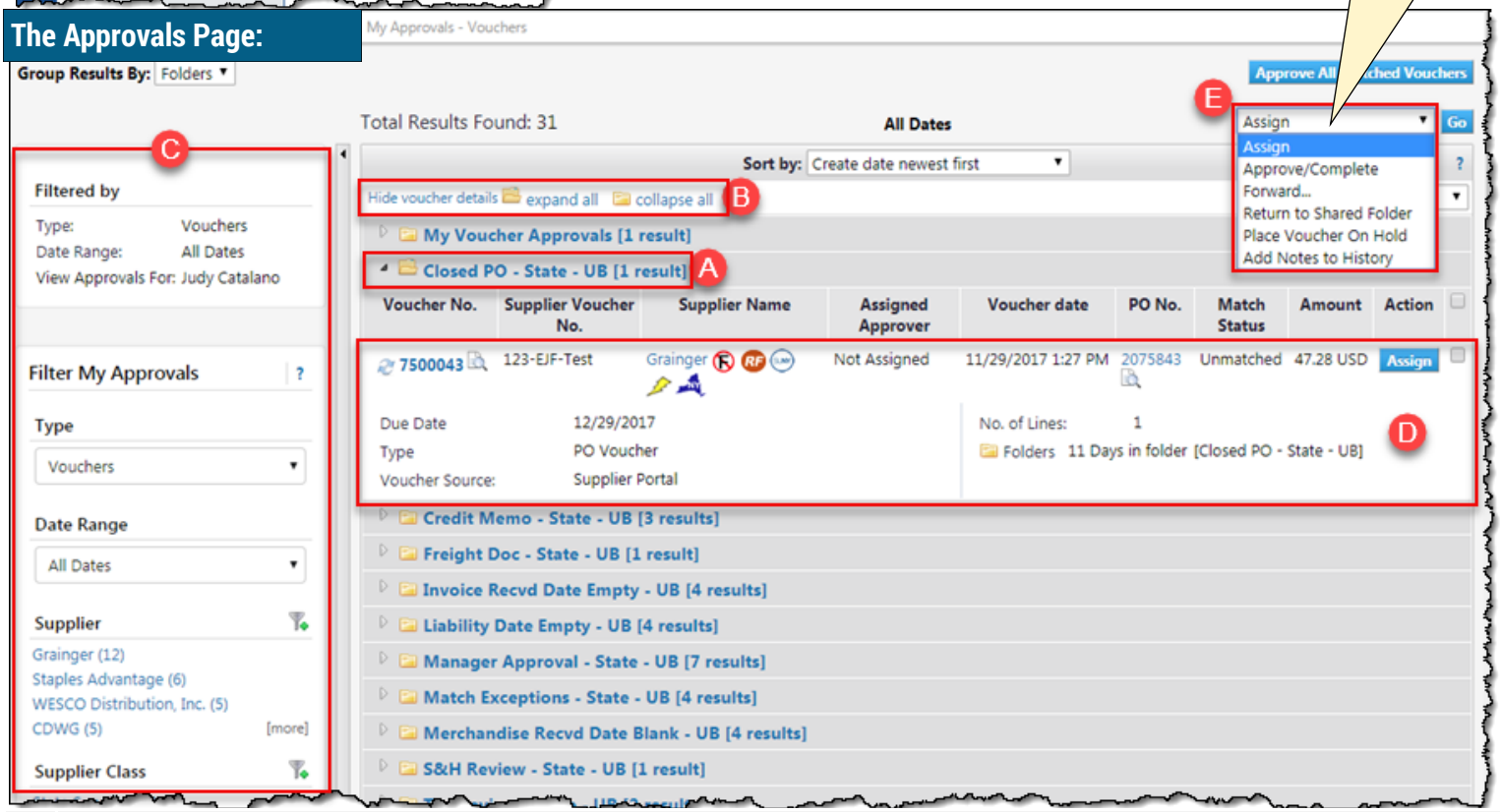


OR



Best Practice is to:
- Assign the Document to yourself
- Open the document and review in detail before approving

The Approvals Page:



A The Approval Folders that you have approval permissions for (expandable). "**My Approvals**" folder holds Documents that have been specifically assigned to you.

B Tools for displaying/viewing your folders.

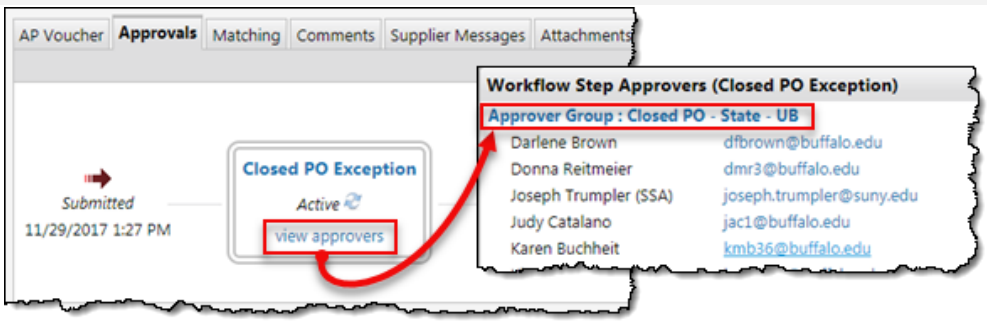
C Filters to help sort the Documents that are awaiting approval. Note the **"Type"** selection, Users that have approval permissions for different system documents (PR, PO, Invoice, Form Requests, etc.) can filter by document here.

D The System Documents awaiting approval. The checkbox selects the document for "action" **(see E)**

E Actions that can be taken on Documents within the folders:
- **Assign:** Takes the document out of the "shared folder" and assigns it to you. ***Once assigned additional actions will be available.***
- **Approve/Complete:** Will approve the document and move it to the next "step".
- **Forward…:** Assigns the document to another Approver (comment required)
- **Return to Shared Folder:** Returns an assigned document to the folder. i.e. Unassigns the document.
- **Place On Hold:** Marks the Document as "On Hold" and assigns it to you.
- **Add Notes to History:** Adds notes to the document comments/history.

Document Workflow:

- Approval Folders directly correlate to the Document Workflow Steps.
- Approving a Document moves it to the next step in the sequence that it meets the criteria for.



What do I Review?

The areas of the Document you need to review before approving will depend on the Document Type (PR, PO, Invoice, Form Request, etc.) and your Role/Workflow assignment, but in general:

- **Items being requested and User making request**
- **Totals & assigned State/RF Account Codes**
- **Any Comments and/or Attachments**
- **Any Role or Approval Custom Fields / Areas**
- **Previous and Future Workflow**
- **Any document specific considerations**

Best Practice: *A Document may only have one Line Item or Account Code out of many that requires your review, often the Workflow Step or Approver Group Name will indicate why it has stopped for Approval, but it's up to you to carefully scrutinize the document for all areas and data that are within your approval authority.*

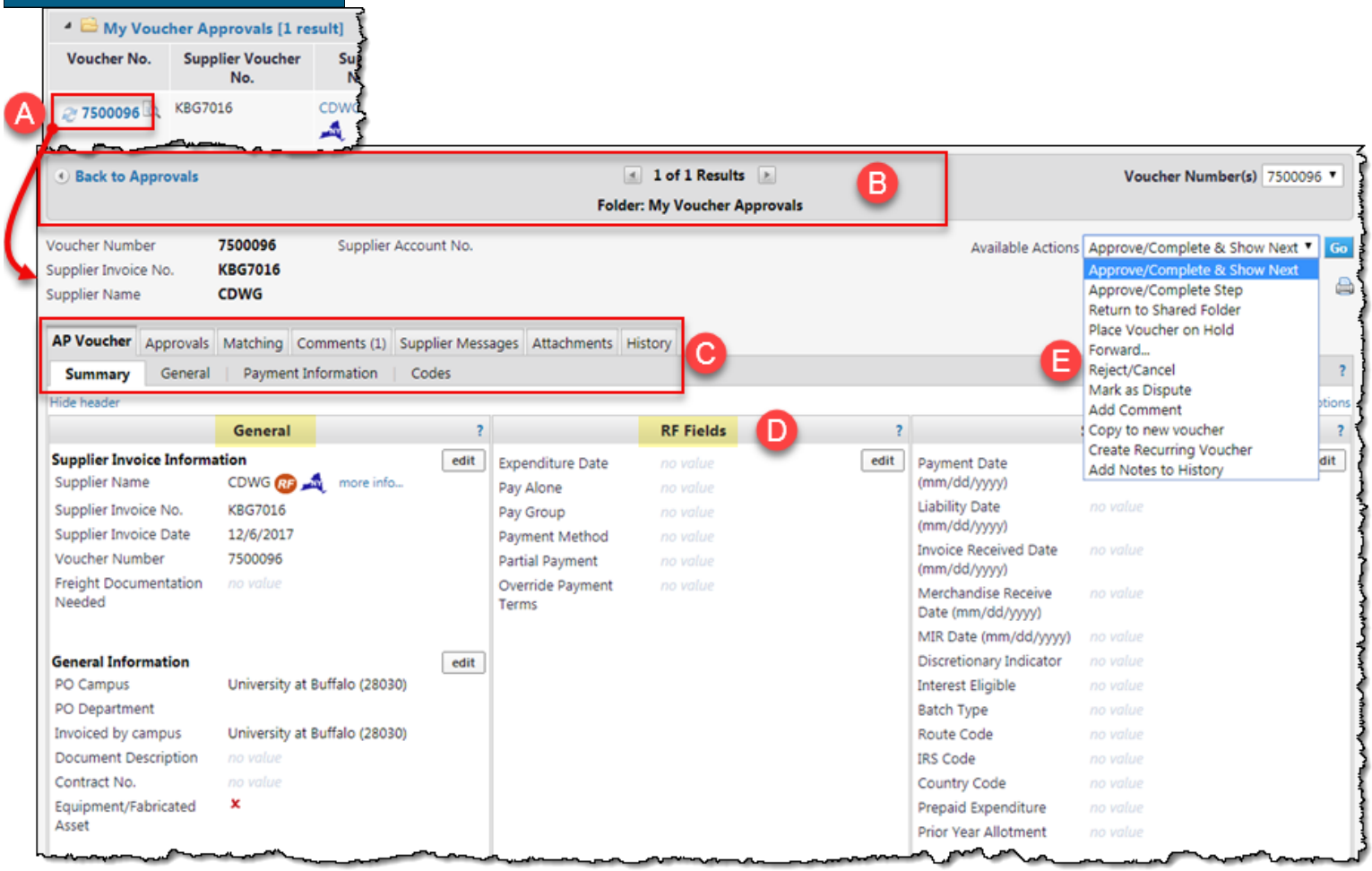
Why "Assign"?

The System has the concept of "**shared**" workflow folders, regardless of the number Approvers within the folder. A Document is always "**unassigned**" when initially placed in the folder for Approval.

- Assigning a Document to yourself indicates in the "shared" folder and workflow that it is assigned, letting other Approvers and Users know that you are reviewing the approval.
- Any Assigned Documents are displayed in the **"My Approvals"** folder (as well as in the original folder).
- Once assigned, additional "Available Actions" may be available on the Document (depending on your Role/Permissions). For Example; You **must** assign the Document to yourself in order to: make any **edits**, **Return** it to the User (for changes) or to **Reject** it.

Best Practice: *Always "Assign" the document to yourself (even if you're the only Approver in the folder) to indicate you have taken ownership of the approval and it is under review.*

Viewing the Document:



A Selecting the Document # in your Approvals Screen brings you to the Document

B Navigation Panel for Documents within the current folder

C Tabs or Menu (depending on Document view; Classic or Updated) for Sections within the Document

D Data Field Groups; Selecting a Tab (or Menu) will display the data field groups for that section

E Actions that can be taken within the Document once Assigned (*will be dependent on specific User assigned Role/Permissions*):

- See following section **"Approval—Document Actions"** for action definitions.

Approval -Document Actions

Actions that can be taken within the Document once Assigned will be dependent on specific User assigned Role/ Permissions. The definitions below are the **most commonly used,** provided for reference but may not be available for all Document Types or specific Users. *(Examples are based on a Voucher, verbiage may vary depending on Document Type)*

Approve/Complete: & Show Next: Approves current Document and advances to the next document in the queue

Approve/Complete: Will approve the document and move it to the next workflow "step".

Return to Shared Folder: Returns an assigned document to the folder. i.e. Un-assigns the document.

Place On Hold: Marks the Document as "On Hold". Useful when research is needed, for sorting approvals and indicating status to system Users via "Approvals".

Forward...: Assigns the document to another Approver (comment required) to have them Approve on your behalf for this "step"

Reject/Cancel: Rejects/Cancels the document.

Add Comment: Adds Comment to Document. Allowing email to involved Users (if selected) and attachments

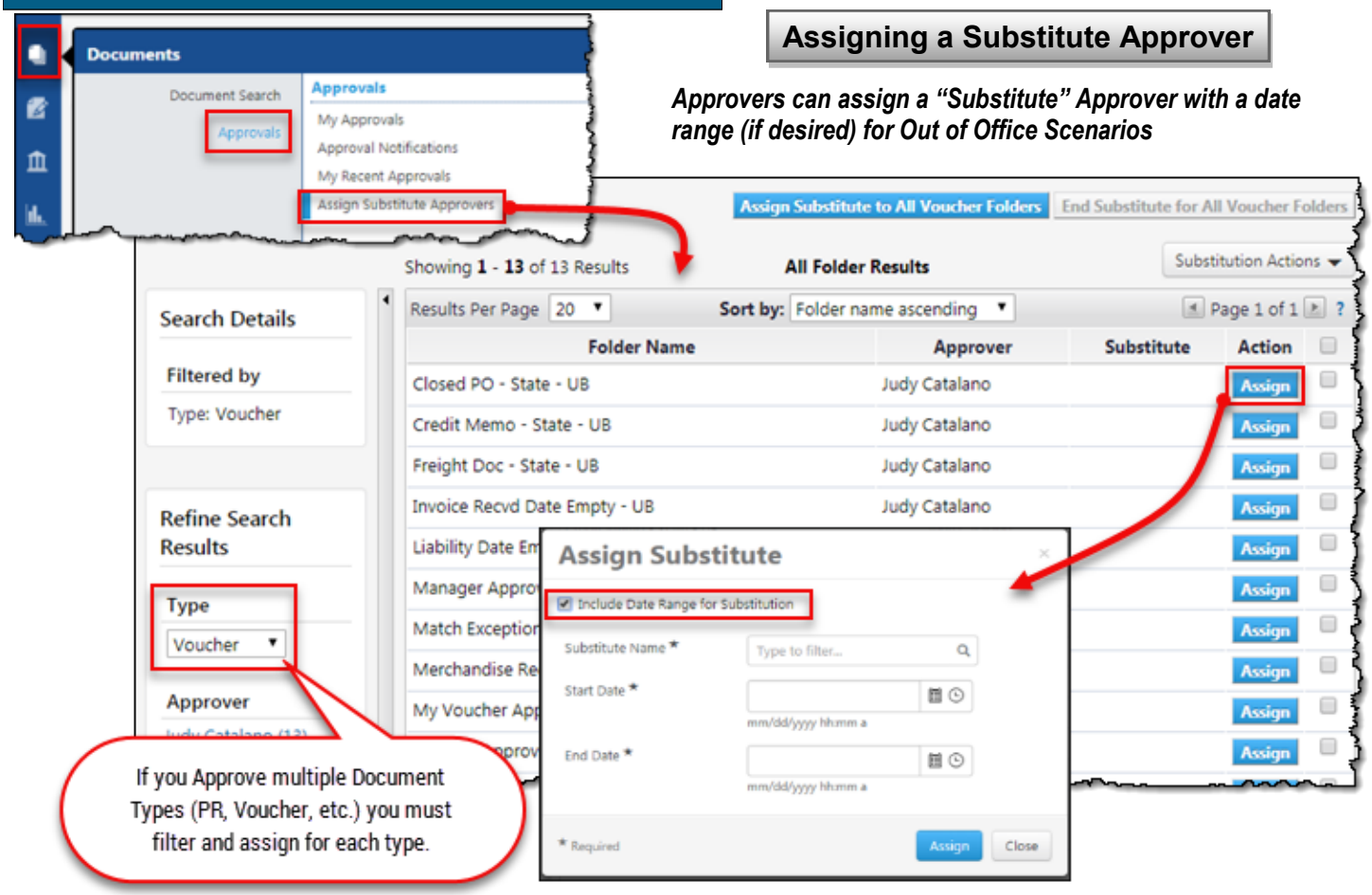
Copy to New Document Copies current document to a new draft document.

Add Notes to History: Adds a note to the Document audit History

Managing Folders/Queues and Approvals:

Assigning a Substitute Approver

Approvers can assign a "Substitute" Approver with a date range (if desired) for Out of Office Scenarios



ASSIGNING A SUBSTITUTE APPROVER - QUICK NOTES

- If you Approve multiple Document Types, Substitutes should be assigned each Document Type (PR, PO, Invoice, Form Request, etc.)
- Assigning a Substitute **DOES NOT** "re-assign" any existing Documents that have already been "Assigned"
- Only Users with the Approval permissions for the Document Type will be available for selection as a Substitute.
- If a Date Range is used and ends (or the Substitution is manually ended), any Documents the Substitute "Assigned" to themselves **WILL NOT** be "re-assigned" to the original Approver
- Folders with a Substitute assigned will be indicated with an icon

The Campus Administrator can assign and end Substitutions for any System Approver

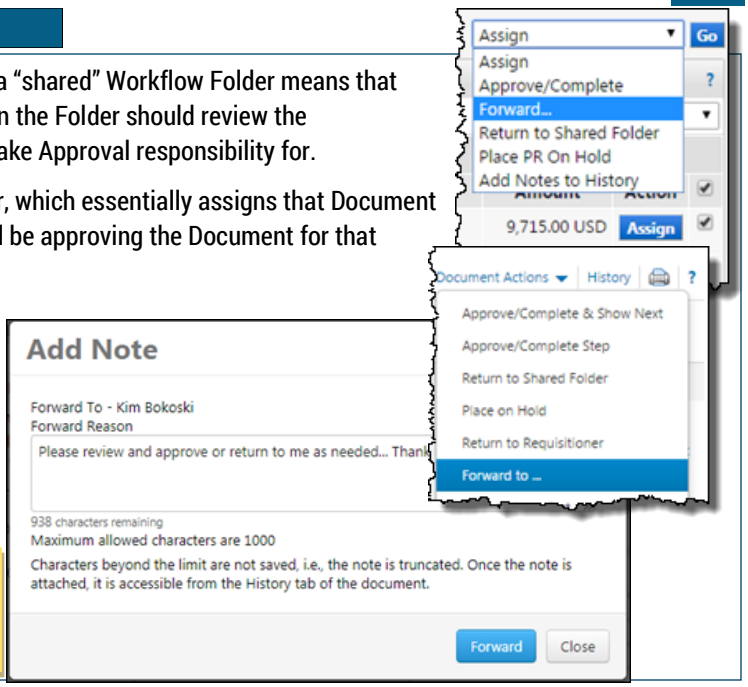
Managing Folders/Queues and Approvals *(continued…)*:

Using "Forward To…" to Assign Approvals

The concept of a "shared" Workflow Folder means that Approvers within the Folder should review the "unassigned" Documents and assign themselves the documents they will take Approval responsibility for.

- If needed, an Approver can Forward a Document(s) to another Approver, which essentially assigns that Document to them for approval. Forwarding an Document means the assignee will be approving the Document for that Folder / Workflow step.
- The ability to "Forward" is permission based, Approvers with this permission can forward multiple (un-assigned) Documents directly from the folder view or Forward Documents they have assigned to themselves using the "Document Actions" menu on the Document.
- The Forwarding of a Document is logged in the Documents audit History, comments provided when Forwarding are added to the Document and logged in audit History.

*The ability to Forward allows the User to select **ANY** System Approver for that Document Type. They are **NOT** limited to selecting only Approvers within their Folder. It is the Users responsibility to select the appropriate Document Approver when Forwarding.*



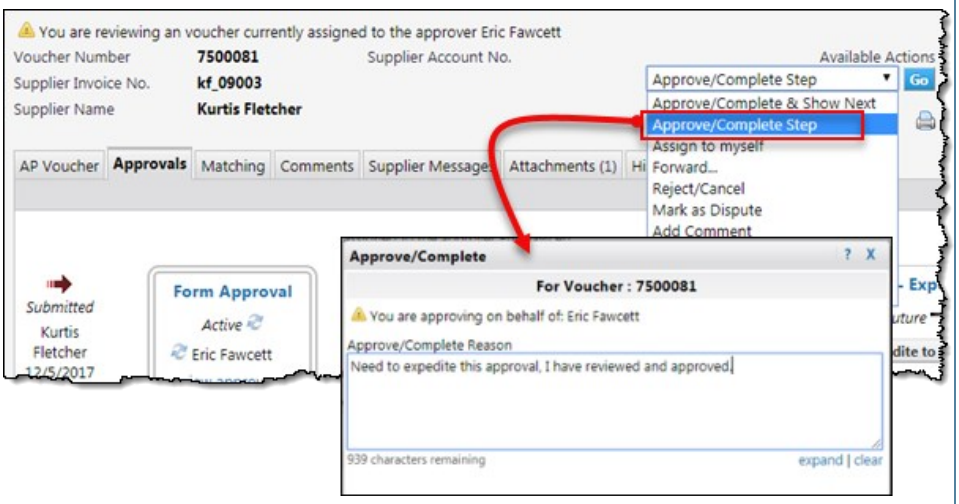
Additional Assignment & Approval Functionality

The following permission based features are typically reserved for Administrators or sparingly enabled for specific Approvers on a "as needed" basis for the purpose of managing their assigned Approval Folders.

Approve/Reject on Behalf of Another Approver

- Provides the ability for a user to approve or reject a Document currently assigned to another Approver.
- Approval actions are recorded in audit History, comments provided are added to the Document and logged in audit History.
- This permission exists separately for each Document Type (PR, PO, Invoice, etc.)

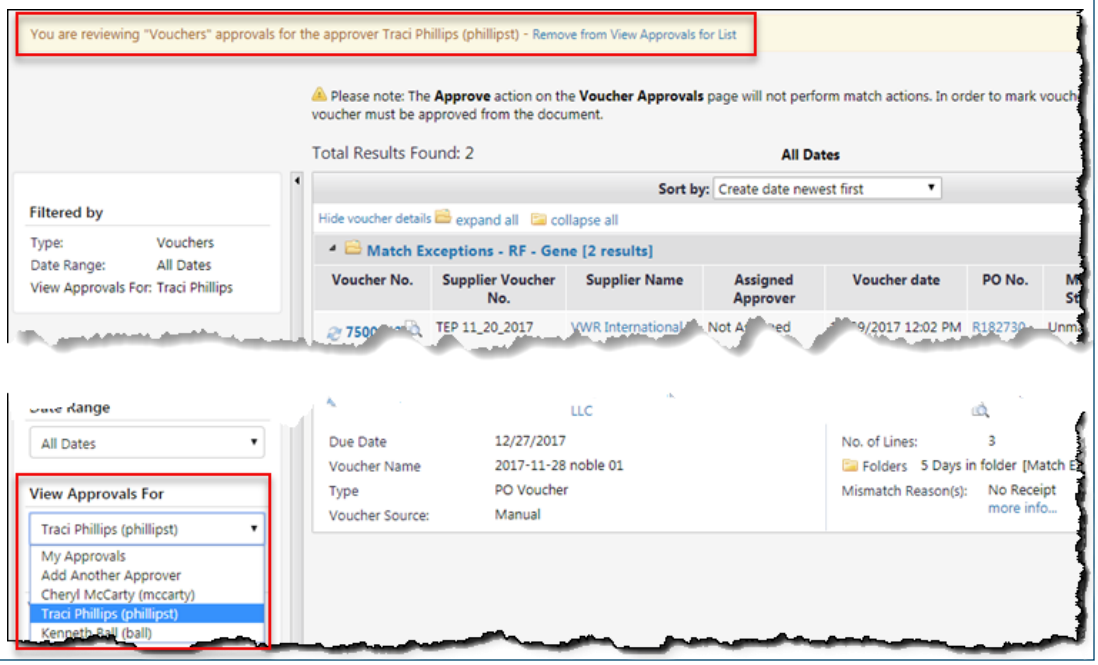
*Users with this permission can approve **ANY** System Document of the Type enabled. They are **NOT** limited to only Documents within their Folder. It is the Users responsibility to only work within their assigned Folder(s) .*



Manage Other Approver's Approval Folders

- Provides the capability for a user to view and manage another approver's personal and shared workflow folders.
- The User will be able to search and select approver's for management, assign Documents, etc.
- Any action performed will be logged in the Document audit History.
- This permission exists separately for each Document Type (PR, PO, Invoice, etc.)

*Users with this permission can manage **ANY** System Approver of the Document Type enabled. They are **NOT** limited to only Approvers within their Folder. It is the Users responsibility to select their assigned Folder Approvers for management .*



Example 1: Creating a Catalog Order for Desktop Office Supplies

1. On the KnightSource Shopping home screen, click on the Gholkar's icon.

2. On the Office Depot website, shop for an item or two and add them to your cart.

3. Click on "Checkout."

4. Back in KnightSource, carefully look at all lines to be sure each has a contract number. If any items do not, check the box to the right of the item and then click the 3 dot icon "…" and select "Move to Another Cart" (these will need to be processed in the separate cart).

5. Once all items have a contract number, you should then assign a name to your cart at the top of the screen (Next to the word Shopping Cart it defaults your cart name to your user name and the date. It is recommended that you replace this with a brief order description to help identify the order later on. (i.e. February 2021 Office Supplies)). "Proceed to Checkout."

6. Click on edit "pencil icon" in the Shipping section of the Requisition.

7. From the Shipping address dropdown, select "Geneseo-DesktopOfficeSupplies" (This will only be done for Gholkar's office supply orders.).

8. Enter your building and room number in the "Bldg/Rm:" field.

9. Click "Save Changes."

10. Click on edit "pencil icon" in the Accounting Codes section of the Requisition.

11. In the Account-SUNY field, click the "arrow" icon. You can then click on "Search" under Organizational Values in order to search for the needed account number. (Note: For RF funded orders, you may need to click on this under the Project, Task, Award, Exp Major, and Exp Minor fields to enter all required account information.

12. Search for and select the correct account you wish to charge and click the "plus" icon to add it.

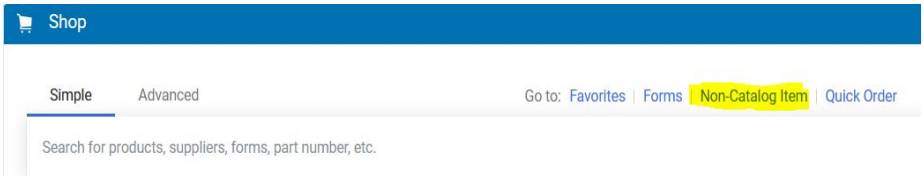
13. Click "Save Changes."

14. Click "Place Order."

15. The requisition is now submitted and should be waiting on the necessary approvals before becoming a purchase order and going to the supplier.

Example 2: Creating a Non-Catalog Item Order for Services

1. Click “Non-Catalog Item” from the Shortcuts options on the home page.



2. In the Non-Catalog Item pop up window, enter the supplier by either typing the name and then selecting from the options or clicking the search icon and selecting the supplier there. If the supplier you wish to use cannot be found, you <u>must</u> type and select New Supplier as the supplier.

3. A default address Fulfillment Address (PO Address) will be assigned. You may select a different fulfillment address if desired. Procurement Services will be reviewing and editing fulfillment addresses for these orders. Please note that addresses that start with an S are State addresses and addresses that start with a 190 are Research Foundation (RF) addresses.

4. You may also enter a Distribution Method (fax or email address where the PO should be sent). This may already have a default distribution method that has been previously set up. Again, Procurement Services will be reviewing and editing distribution methods for these orders.

5. Complete fields as follows:

    a. Description: enter a detailed product description of the goods or services.

    b. Catalog No: enter catalog number, if applicable.

    c. Quantity: enter how many units.

    d. Price: enter price.

    e. Packaging: enter unit of measure. **Please note:** If you are submitting an order for a service that may include multiple payments against one line, you <u>must</u> select USD as the unit of measure.

    f. Check boxes for any relevant features, if applicable (e.g., Recycled, Hazardous Material, etc.)

6. Click “Save and Add Another Line” to add any additional items (up to a total of 39 items). Users must enter each separate item as a separate line (This includes any shipping costs, if applicable.).

7. When finished adding items, click on “Add Internal Attachments” and then click on “Select Files.” You should select and attach all necessary attachments (i.e. quotes, justifications, back-up documentation, etc.) and then click “Save Changes.” Note: If attaching multiple quotes or different files, it is helpful to Procurement if these files can be attached as separate documents when possible.

8. Click “Save.”

9. Click the “shopping cart icon” at the top of the page and click “View My Cart.”

10. You should then assign a name to your cart at the top of the screen (Next to the word Shopping Cart it defaults your cart name to your user name and the date. It is recommended that you replace this with a brief order description to help identify the order later on. (i.e. February 2021 Office Supplies)).

11. Click “Proceed to Checkout.”

12. If you are the point of contact for the order, skip to step 13. If notifications should go to another user instead of you, click on edit “pencil” in the General section of the requisition. Click the “search” icon in the Prepared For field. Search for the user and click the “plus” icon to select. Click “Save Changes.” Please note: This should only be done if there is someone other than yourself who should get the receiving notification reminder emails to acknowledge receipt of the order when Accounts Payable receives an invoice.

13. Go to the Accounting Codes section of the requisition and click the edit “pencil” icon.

14. In the Account-SUNY field, click the “arrow” icon. You can then click on “Search” under Organizational Values in order to search for the needed account number. (Note: For RF funded orders, you may need to click on this under the Project, Task, Award, Exp Major, and Exp Minor fields to enter all required account information.

15. Search for and select the correct account you wish to charge and click the “plus” icon to add it.

16. Click “Save Changes.”

17. Click “Place Order.”

18. The requisition is now submitted and should be waiting on the necessary approvals before becoming a purchase order and going to the supplier.

Example 3: Creating an Order using a Form

1. Click on the “Payment Request Form” under “Special Requests” at the bottom of the KnightSource Shopping home screen.

2. In Section 1, enter the supplier name by either typing the name and then selecting it, or by clicking “Supplier Search” and selecting the supplier there.

3. Select the Supplier Type “Individual/Supplier.”

4. Section 2 and 3 can be left blank and skipped.

5. In Section 4, enter the Description, Unit Price, and Quantity.

6. In Section 5, select the Payment Type. In most cases, this is “Supplier Payment.” If the goods/services have been received, select the “Merchandise Received Date.”

7. In Section 6, enter the Supplier Invoice Number and Supplier Invoice Date.

8. In Section 7, you can enter additional details or a justification if needed.

9. In Section 8, you need to attach any supporting documentation (i.e. invoice, W-9, justification, etc.). Click “Add Attachments.” Note: If attaching multiple files, it is helpful to Procurement if these files can be attached as separate documents when possible.

10. Click on “Select Files.”

11. Select and attach the documents and then click “Save Changes.”

12. In Section 9, read the certification statement and click on “I agree to the terms above.”

13. Scroll to the top of the form and select “Complete Form and Go To Cart” from the Available Actions. Click “Go.”

14. You should then assign a name to your cart at the top of the screen (Next to the word Shopping Cart it defaults your cart name to your user name and the date. It is recommended that you replace this with a brief order description to help identify the order later on. (i.e. February 2021 Office Supplies)).

15. Click “Proceed to Checkout.”

16. Go to the Accounting Codes section of the requisition and click the edit “pencil” icon.

17. In the Account-SUNY field, click the “arrow” icon. You can then click on “Search” under Organizational Values in order to search for the needed account number. (Note: For RF funded orders, you may need to click on this under the Project, Task, Award, Exp Major, and Exp Minor fields to enter all required account information.

18. Search for and select the correct account you wish to charge and click the “plus” icon to add it.

19. Click “Save Changes.”

20. Click “Place Order.”

21. The requisition is now submitted and should be waiting on the necessary approvals before becoming a purchase order.