

Buyer Guide

This guide will review how to shop, create requisitions and track your requisitions, orders and invoices

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Logging In

1. Open your web browser
2. Log into WesPortal and find the link to **OneSource** in the Finance folder
OR
3. In the address field, type <https://wesleyan.unimarket.com>.
4. Enter your Wesleyan username and password

If you experience any issues logging in, please contact purchasing@wesleyan.edu.

The Buyer Role in CTW OneSource

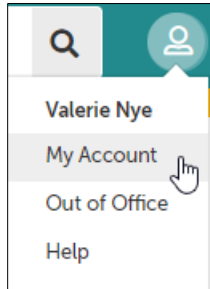
Every WFS User is assigned the “Buyer” role in CTW OneSource. The Buyer role gives users the authority to make purchases using the University’s funds based on their SmartKey security. Buyers in the **OneSource** eProcurement system have the permissions for the following:

- Access suppliers in the online marketplace created specifically for Wesleyan University
- Search and browse the contracted pricing catalogs from the Wesleyan University suppliers
- Request and receive quotes from preferred suppliers (Function initially only available upon request. Contact purchasing@wesleyan.edu)
- Fill an individual shopping cart for checkout
- Accept and process requests from other users (Browsers) in the department that do not have SmartKey authority
- Create requisitions for purchases against Wesleyan SmartKeys
- View the status and approval path of requisitions
- View and export reports on purchase orders
- Indicate that the goods or services were received and are approved to pay
- View and track invoices against the purchase orders

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My Account Settings

When you initially log into **OneSource** it is recommended that you check your account details. You can find the My Account page under the silhouette at the top right of the screen. Within the My Account page you can update your preferred first and last name, phone number (without hyphens) and email address as well as set your default smartkey. Setting your default smartkey will make the checkout process more efficient if you use the same smartkeys repeatedly. You can also access the online Help provided by Unimarket (the CTW OneSource vendor) in the Help page under the My Account menu.



User Details

Out of Office

Settings

User Details

Username
vnye

First Name
Valerie

Last Name
Nye

Code
860



Phone
6853192

Ext

Email
vnye@wesleyan.edu

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Key Concepts

- There are two types of suppliers found in **OneSource**:
 - **Premium Supplier** – supplier who has a catalog in the **OneSource** marketplace or provides roundtrip/punchout access to their ecommerce site from **OneSource**.
 - **Non-Catalog Supplier** – supplier who does not have a hosted catalog on **OneSource** or provide roundtrip/punchout access to their site and instead requires products to be manually created on **OneSource**.
- Products to be ordered from a supplier can be accessed in one of three methods:
 -  **Roundtrip/Punchout** – supplier products are found on the suppliers' ecommerce website with a direct link to and from **OneSource**. Roundtrip/Punchout functionality will be identified with the globe icon. A new window or tab will open in your internet browser and you will be signed into the Wesleyan account on the supplier's ecommerce site.
 -  **Hosted Catalog** – supplier products are “hosted” on the **OneSource** website, meaning you do not leave the **OneSource** website to search and order these products. Hosted Catalogs are identified with the folder icon.
 - **Non-Catalog Items (Coming Soon!)**– products requiring information to be entered manually. Even Premium Suppliers could have products that can be entered manually if a product is not found in any of their catalogs. This functionality is currently unavailable but will be coming soon.

Searching

Products or Suppliers can be located by searching the loaded catalogs of suppliers using the search options detailed below.

Product Searching (Currently limited functionality until additional suppliers are loaded)

Product searches can be completed using the search function in the title section of **OneSource**. The loaded catalogs or supplier key words can be searched. This search field will also search for supplier names. To search in this method, complete the steps listed below:

1. From the title section, type the product name or key word search term in the search field.

A screenshot of a search field. On the left, there is a dropdown menu with 'All' selected. The search input contains the text 'glove'. On the right side of the field, there is a small 'x' icon for clearing the text and a magnifying glass icon for submitting the search.

2. Click **Search**.
3. Any products, supplier names or key words that match the criteria will appear in the search results.

Searching Tips

- Search terms can be combined using the words **AND** and **OR**.
 - **AND** will search for both words/phrases.
 - **OR** will search for one word/phrase or the other.

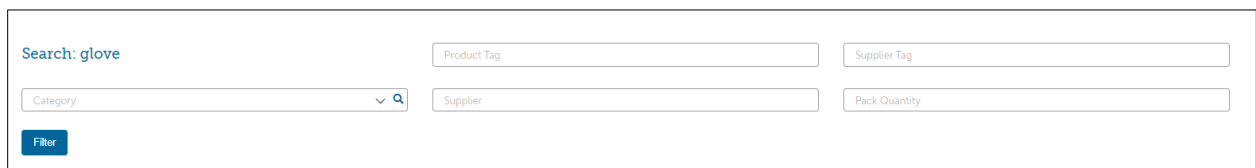
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- Wildcard searches can be performed if the exact search word/phrase is unknown.
 - ? will replace a single character; i.e. "Te?t" could be Test or Text.
 - * will replace multiple characters; i.e. "Test*" could be Tester or Testing.

Advanced product searching allows the search to be narrowed by Product Tag, Supplier Tag, Supplier Category, Supplier, or Product Category.

1. After you have entered your search in the search bar and hit "enter" or clicked on the magnifying glass; your search results will populate and you will have the ability to filter those results based on the advanced search filters.
2. If desired, select a **Product Tag**, **Supplier Tag**, **Category** or **Supplier** from the drop down list.
3. Click **Search**.
4. Any products that match the criteria will appear in the search results.

NOTE: Results will not return products from roundtrip suppliers unless they have additional search functionality enabled such as an "Index Catalog".



The screenshot shows a search interface with a search bar containing the text "Search: glove". Below the search bar are several filter fields: "Product Tag", "Supplier Tag", "Category" (with a dropdown arrow and a magnifying glass icon), "Supplier", and "Pack Quantity". A blue "Filter" button is located at the bottom left of the filter section.

Supplier Searching

If you are searching for a specific supplier, there are multiple ways to locate the supplier and the product.

- From the Dashboard tab on the menu bar, click on the **Supplier icon** in the Recently Used Suppliers list of the Information Section.
- From the Dashboard, click **View all suppliers** at the bottom of the Recently Used Suppliers list of the Information Section.
- Click on the Marketplace drop-down on the menu bar, click **View Suppliers**.

Once you are on the Marketplace page you can search for the supplier by name.

Requesting a New Supplier

If you do not find a supplier that you wish to order from, you can request that the supplier be added into **OneSource** by clicking "Supplier Request" in the task menu on the right side. This will initially open to the Unimarket Directory that is a list of all the suppliers that Unimarket currently has a relationship with.

If a supplier you wish to add is part of the Unimarket Directory, click on "Request Access" which will bring up a box to add a reason for the request and any applicable attachments. Complete the "Forward Request To" box with Olga Bookas, our Director of Purchasing.

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Request Access x

Supplier Name
3Dog Night

Forward Request To
Olga Bookas

The user who manages the Supplier Request process. This user will decide on processing your request forward.

Reason

Attachments

Drop files to attach, or [browse](#)

Size limit 50M.


Send

Cancel

If you do not see your requested supplier in this list, simply click the “Request Supplier” button in the upper right corner of the page and complete the “Request New Supplier” panel. Note: new suppliers are reviewed and on-boarded on a monthly basis so you may not receive an immediate answer.

Filling your Shopping Cart

Shopping by Catalog

If a hosted catalog folder icon, appears () after clicking on the supplier name or icon, you will be selecting products from the supplier’s hosted catalog on **OneSource**. The supplier may have multiple catalogs that appear.

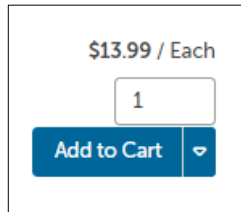
1. Click on the **supplier catalog** that you wish to shop.
2. The products available within the catalog will appear.

	<p>100 micrometer PEEK Sample Loop (7500492) a single-injection, chromatographic sample loop that accommo Shipping: Manual Order Delivery</p>	<p>Bio-Rad Laboratories ♥ Add to List</p>	<p>\$13.99 / Each 1 Add to Cart</p>
	<p>10x Copper Stain (1610471) 125 ml Shipping: Manual Order Delivery</p>	<p>Bio-Rad Laboratories ♥ Add to List</p>	<p>\$13.99 / Each 1 Add to Cart</p>
	<p>10x IEF Anode Buffer (1610761) 250 ml Shipping: Manual Order Delivery</p>	<p>Bio-Rad Laboratories ♥ Add to List</p>	<p>\$13.99 / Each 1 Add to Cart</p>

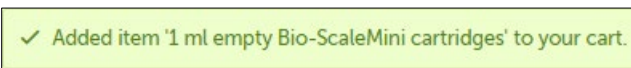
3. Browse items individually or use the search bar to search within the selected catalog.

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4. The sort by option defaults to relevant search term Name but can be changed to Code, Lowest Price, or Highest Price.
5. Clicking on the product title or product image will give you more information about the product.
6. When you have decided on a product to order, type the quantity in the Quantity field to the left of the Add to cart button.




7. Click the **Add to cart** button.
8. A confirmation message will appear and the shopping cart will update to reflect the total number of products.

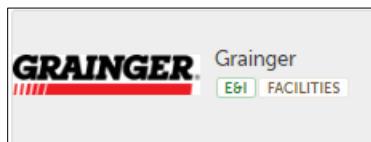


9. Repeat steps #3 – 9 for as many products as you need to order from this supplier.

Shopping by Roundtrip (Punchout)

If a globe icon appears () after clicking on the supplier name or icon, you will be sent to the supplier's website and logged into the Wesleyan University pricing catalog.

1. Click the **supplier** that you wish to shop from the marketplace.



2. Click the **roundtrip icon** or **supplier name** to go to the supplier's website.



3. Each supplier's website will be different. Browse and search for products as if you had come to the supplier's website directly.
4. Add products that you wish to order on the supplier's website by clicking the **Add button**.
NOTE: The terminology of the button to click will vary based on the supplier's website.
5. When finished shopping, click the **Checkout** or **Submit Requisition button** to return to **OneSource**.
NOTE: The terminology of the button to click will vary based on the supplier's website.

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- You will be returned to your shopping cart in **OneSource** with the products you had selected. The additional tab or browser window that opened for the supplier's punchout site should close automatically. If this does not happen, email purchasing@wesleyan.edu or submit a ServiceNow ticket for ITS to look at your browsers settings.

Shopping with Non-Catalog Items (Note: Limited availability initially)

If a supplier does not provide a catalog, you can create a Non-Catalog Item. You will need to enter the product's information in the Non-Catalog form.

- Click the **supplier** that you wish to shop.
- Click the **Create a Non-Catalog Item** link to enter the products details.



- From the Item Name field, type in the name of the product to be ordered.
- Click the **Next button**.

- Any products similar to what you entered that are in a contract pricing catalog will appear on the screen. If one of these products could be ordered instead, type in the quantity and click **Add to Cart**. If the products displayed are not what you need, click **Next** at the bottom of the screen to continue defining the product details.

- Type in the product information.

NOTE: Fields marked with a red asterisk are required fields

- *Name** - will be filled in from your previous entry
- *Unit Price** – type in the single unit price of the product.
- *Unit of Measure** - type in the Unit of Measure or select from the drop down list. Each (EA) is the most common unit of measure.
- Description** – description of product to ensure the supplier knows what you are ordering. The more detail, the better to ensure order accuracy.
- Product Code** - supplier's product number or SKU.
- Category** – These are the UNSPSC international standard commodity codes. Type in the category code or select it by starting to type a commodity and selecting from the dynamic list that will appear.

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- g. **Manufacturers Part ID** – If the supplier is a reseller, you may enter the additional product ID number that refers to the manufactures product.
7. Next to the Add to cart button, type in the quantity to be ordered.
8. Click the **Add to cart button**.
9. You will be returned to the product screen to enter the next product line and a notification on screen will let you know that the product was added to your cart.

✓ Added item 'Fastener' to your cart.

10. Repeat steps # 3 – 9 for each product line that you wish to order.

GRAINGER Create a Non-Catalog Item
Wesleyan University > Grainger

Name Search Item Details

Name *

Unit Price * \$

Unit of Measure *

Optional Details

Description

Product Code

Category

Manufacturer Part ID

Shopping Cart

The shopping cart appears in the header bar at the top of the page. The number of products will appear in the cart.

Reviewing the Shopping Cart

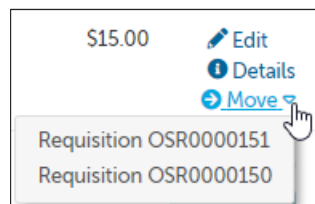
1. Click the **shopping cart icon** to view the products that have been added and be taken to your shopping cart.



2. All products in the cart will appear by supplier with an individual supplier total.

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- To adjust the quantity of any product, type the new quantity into the Quantity field of the product. The line item subtotal will update as you go.
- To remove any product from the cart, click the **red X icon** next to the Quantity field.
- To remove all products from the cart, click **Clear Shopping Cart** in the upper right hand portion of the screen.
- You are able to edit any of the Non-Catalog or Manual products that you have entered if you notice any incorrect information. Use the **Edit** button to the right of the Subtotal.
- The **Move** button will allow you to move the product from your cart to a saved or incomplete requisition. From the requisition view, the **Move** button will allow you to move the item to a different requisition or back to your cart.

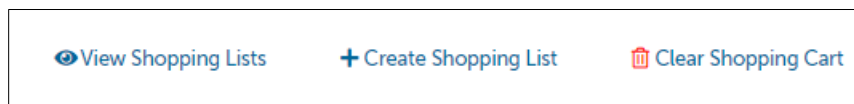


Product		Quantity	Price	Subtotal	
<input checked="" type="checkbox"/>	GRAINGER Fastener	1	\$15.00 /Each	\$15.00	Edit Details Move
<input checked="" type="checkbox"/>					Supplier Total: \$15.00
					Checkout

Creating a Shopping List of Frequently Ordered Products

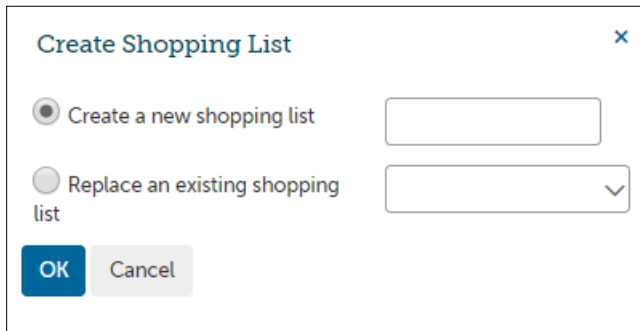
If you have products that you regularly order, you can create a shopping list that can be reused every time you need to order those products. The products to be added to the shopping list need to be in the cart before proceeding. This is a great way to save time when you enter the product(s) manually on a frequent basis.

- From the cart screen, click the **Create Shopping List**.



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2. The Create Shopping List screen will appear.



The screenshot shows a dialog box titled "Create Shopping List" with a close button (X) in the top right corner. It contains two radio button options: "Create a new shopping list" (selected) and "Replace an existing shopping list". The first option has a text input field to its right. The second option has a dropdown menu to its right. At the bottom, there are two buttons: "OK" and "Cancel".

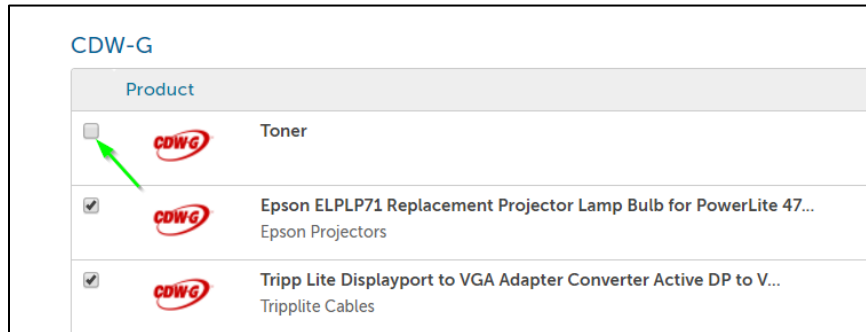
3. The radio button for Create a new shopping list will be selected. Type a name for the shopping list in the field to the right.
4. If a shopping list has already been created and needs to be changed, select **Replace an existing shopping list** and select the shopping list from the available options.
5. Click **OK**.
6. Once a shopping list has been created, it can be accessed by clicking on **Marketplace** in the menu bar and selecting **Shopping Lists**. The following options are available:
 - a. **Add selected to Cart** – select the products you want from the shopping list and click **Add selected to Cart** to add the products to your cart.
NOTE: Doing so will replace anything that is currently in the cart.
 - b. **Share Shopping List** – allows the user to share the shopping list they created with other organization units.
 - c. **Delete Shopping List** – click **Delete Shopping List** to permanently delete the template. A confirmation message will appear prior to deletion to confirm your selection.

NOTE: When you use a Shopping List, the products will add to any current products that you have in your shopping cart.

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Creating a Requisition

1. Any products appearing in the shopping cart with a check in front of the product will be forwarded on to the checkout screen. If you do not wish to order a product yet but don't want to delete it from the shopping cart, click the **checkbox** to remove the check.



2. Click Checkout to start the checkout and requisition process for the items being purchased for this supplier.

Checkout

Locations

The shipping and billing addresses will be selected in the Locations section of the checkout screen. These addresses are preloaded in **OneSource**. Do not change the "Bill to" location but please double check and change the "Ship To" location as needed as that is used by the supplier. If you select another location and complete the checkout, your selection will be your new default for your next checkout process. You can type any part of the location name to navigate the dropdown list easily.

Attn Field

The Attention To field (Attn) is a free form field. It is very important in your checkout process to ensure the accuracy of the delivery by the supplier. The most pertinent information for delivery should be first (left to right) in the "Attention To" field - i.e. lab or room # / Recipient last name / phone extension.

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Example:

Ship To	ITS - Millennium
Attn	Valerie Nye
ITS - Millennium [W_ITSM] Exley Science Center, 5th Floor 265 Church Street Middletown, CT 06459 United States	

Bill To	Accounts Payable	Ship To	ITS - Millennium
Attn:Accounts Payable Accounts Payable [W_ACTP] Accounts Payable 287 High Street Middletown, CT 06459 United States		Attn Valerie Nye	ITS - Millennium [W_ITSM] Exley Science Center, 5th Floor 265 Church Street Middletown, CT 06459 United States

Organization (Department) Selection

Below the Bill To and Ship To section of the checkout screen will be an Organization section. This section is for visibility and receiving capabilities across your organization to the supervisors and other users.

Organization	Finance Office
Organization Unit	(1095) Finance Office
This is the organization unit you are making the purchase for. It is used to group transactions by organization unit.	

Select the Organization that is appropriate for your purchase. Selecting the correct Organization unit will allow others in your organization to view and perform any necessary receiving actions for this purchase order. You may only have one selection or you may have many to choose from depending on your organization's structure.

Checkout Items

The items that you selected from the shopping cart will be listed as separate lines in your checkout items. Each line item will show the product name, Unit Price/Unit of Measure, Quantity and Subtotal. You may remove the line items from the checkout screen using the buttons to the right of the products.

Use the chartfield spaces to enter the value of the required SmartKey and Accounts.

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- a. If you have set your default accounts in your My Profile Settings page, these fields will auto populate in every checkout instance. It is not recommended that you default the Account field as that should change for each type of purchase that you are processing. The Fund and Dept will auto-populate after you make your Account selection.
- b. You can begin typing the number or description of the SmartKey element value and a dynamic list will appear to be chosen from.
- c. Use the magnifying glass to open a search window if you have trouble finding the SmartKey that you are trying to use for the line item.
- d. You can use the Copy Down button to repeat your selected accounts to each line below.

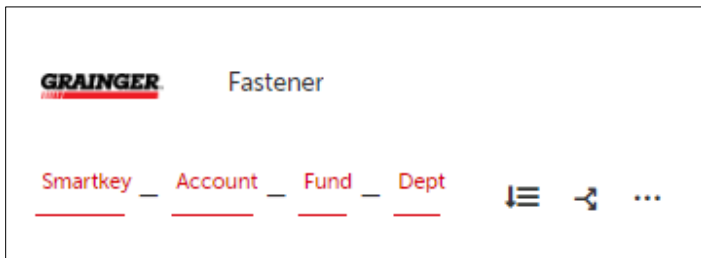


- e. You can use the Split Account Code button to split the charge among multiple Smartkeys and/or Accounts.



Delivery Date

- f. Delivery Date is an optional field on the line item that can be filled in as a suggested or preferred delivery date to the vendor. For critical deliveries, please follow up with the supplier directly to confirm the delivery date.



Notes and Attachments

Enter any notes or attach any related documents to your order in the Justification or Notes and Attachments section of the checkout screen.

- g. The Justification Notes and Attachment are for internal justification use and will not be sent to the supplier. The Justification Notes will always be on the requisition and not carried over to the Purchase Order.
- h. The Delivery Notes and Order Attachments are for sending information to the supplier and will be sent to the supplier with the final PO.

NOTE: If a different address is needed for delivery, alert the system administrators by emailing purchasing@wesleyan.edu so they can add the new location to the prepopulated list. Adding a different address in the delivery notes will not guarantee that the order is delivered to that address.

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- i. You can attach as many documents as needed with a single file size limit of 50 megabytes
- j. You can also attach a file in the Order Attachments and choose not to send it to the

supplier by clicking Unshare.



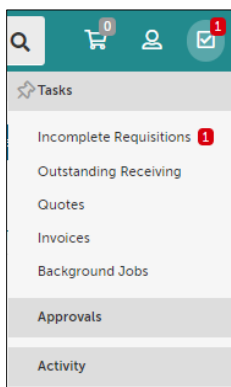
<input type="text" value="Delivery notes"/> <input type="text" value="Blanket order"/> Optionally create a release order selecting a blanket order to draw down from.	Order attachments You can choose which order attachments will be sent to the supplier together with the order. <div style="border: 1px dashed gray; padding: 5px;">Drop files to attach, or browse Size limit 50M.</div>
Contract	
Justification	
① The justification and attachments are for review by the approver. They will not be sent to the supplier.	
<input type="text" value="Justification"/> <input type="text" value="Justification Type"/>	Justification Attachments <div style="border: 1px dashed gray; padding: 5px;">Drop files to attach, or browse Size limit 50M.</div>

Saving a Checkout

If you need to enter more information and must come back to the checkout screen, you can Save your checkout progress.

Save

This will create an Incomplete Requisition that can be seen in the Task Menu.



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Once your checkout screen is complete with all the needed information, click Checkout.

Checkout

Reassigning your cart

If you need to send this requisition to another buyer for more information or to complete the requisition and process for approval routing, click **Reassign**.

Reassign

A popup will prompt you to reassign your requisition to a Buyer. You can also include any important notes to the Buyer here.



The screenshot shows a 'Reassign' popup window. At the top left is the title 'Reassign' and a close button 'x'. Below the title are two fields: 'Assign To *' with a dropdown menu and a downward arrow, and 'Note *' with a large text area. At the bottom left are two buttons: 'OK' and 'Cancel'.

A confirmation message will appear stating that the items have been forwarded to the designated individual. The Buyer will receive an email notification and the Incomplete Requisition will appear in the Tasks Menu for the Buyer to complete the requisition and route for approval. You can see the incomplete requisition status if you look at the View Requisitions page.

SmartKey Security Check

If you do not have WFS access to purchase with the selected SmartKey, you will see the below error. You will not be able to continue and must contact your administrator.

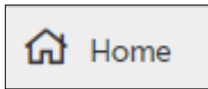
⊗ SmartKey not available to user /

Note: you will not lose the products that you have added to your cart, they will be available in your shopping cart. It is recommended to Save your checkout to preserve the information entered on the checkout screen.

CTW OneSource Buyer Guide Tracking Requisitions

After you successfully create a requisition you will be able to monitor the progress from your Dashboard on **OneSource** or from the Requisitions page under the Orders menu.

1. Click the Home button or the **CTW OneSource** logo.



or



2. Requisitions that have been submitted can be viewed in the Requisitions in Progress area of the information section of the Dashboard.

Requisitions in Progress			
Grainger	R100160	3/14/2019 11:58 AM	\$50.00
Grainger	R100148	3/14/2019 11:20 AM	\$599.00
Grainger	R100146	3/14/2019 11:20 AM	\$599.99
Grainger	R100147	3/14/2019 11:20 AM	\$599.99

[View requisitions](#)

3. Click on the **requisition** from the list.
4. You may also click **View all requisitions** to see all of your requisition.
 - a. The View Requisitions screen will appear.
 - b. You can see the header level requisition information as well as the current approver(s).
 - c. The top portion of the screen will allow you to search for a requisition. Select from one or more of the following search options and then click the **Search button**.
 - i. **Requisition Number**
 - ii. **Supplier**
 - iii. **Created Date**
 - iv. **State**
 - v. **Buyer**
 - vi. **Organization Unit**
 - d. To select a requisition, click on the **Requisition number** from the list.
5. To view the approval status of the requisition, click on the Approvals tab. You will see the approvals that have happened, who the requisition is with now for approval and the next approval steps needed before the order is created.

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Items	Approvals	Comments
Approval Process Instance: 2 - Current		
NON-ACADEMIC DEPT APPROVAL: 2- 1021 Finance and Administration [1201021100-82450-120-1021] In Progress		
Approver	Created Date	Completed Date
2 - 1021 Finance and Administration AA GROUP Level: (\$1000) (\$1,000.00) Escalated		
Escalated automatically at 5/1/2019 1:56 PM.		
Jeffery Murphy	4/29/2019 1:56 PM	
Sherri Condon	4/29/2019 1:56 PM	
2 - 1021 Finance and Administration EL GROUP Level: Over 5,000 (\$999,999,999.00) In Progress		
Christopher Olt	5/1/2019 1:56 PM	
Joyce Ann Topshe	5/1/2019 1:56 PM	
Valerie Nye	5/1/2019 1:56 PM	

6. The various approval statuses include:
 - a. **Approved** - approved and advanced to the next level to an order
 - b. **Declined** – was not approved and sent back to buyer
 - i. Declined requisitions can be copied and edited for resubmittal by the buyer who originally created the requisition
 - c. **Escalated** – skipped an individual to advance to the next level
 - d. **Skipped** – skipped an individual to advance to the next level
 - e. **In Progress** - current level of approval
7. Once a requisition has been completely approved, a purchase order will be generated and sent to the supplier. An email from **OneSource** with the purchase order number and details of the purchase order will be sent to the buyer and the originator of the requisition confirming that the order was sent to the supplier. The buyer may also get a confirmation email directly from the supplier, which is important to retain as that will have an order number.
8. Every thirty minutes **OneSource** will send purchase order information to the WFS financial system and encumber budgeted funds.

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Reprocessing a Declined Requisition

If your requisition is declined for any reason you will receive an email notification with the requisition number and details along with any notes that the declining approver provided. Follow the below steps to Copy and resubmit the requisition with changes.

1. Click the link to view the declined requisition from declined email notification or go to View Requisitions and search by Declined in the state search filter.
2. At the top right of the requisition view page, under the Actions menu, you will see the option to Copy the requisition.

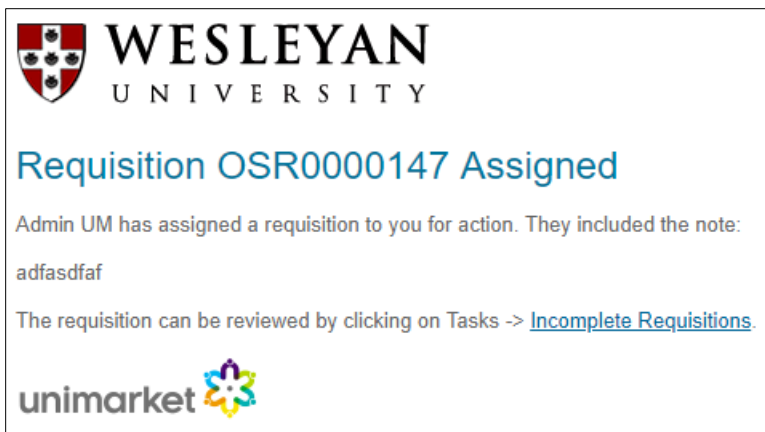


3. When you copy the requisition, all information including the notes and attachments will be copied into a new Incomplete Requisition for you to edit and resubmit.
4. When you Copy, you will be taken directly to the Incomplete Requisition. Make any needed edits to the copied requisition and click Checkout to create the new requisition and route it for approval.
5. The new requisition will have a new number but will have a link and reference to the old requisition for historical information.

NOTE: Most issues can be resolved by utilizing the Comment field. We encourage approvers to use that rather than declining the requisition so that workflow on the other lines is preserved.

Incomplete Requisitions from Browsers or Buyers

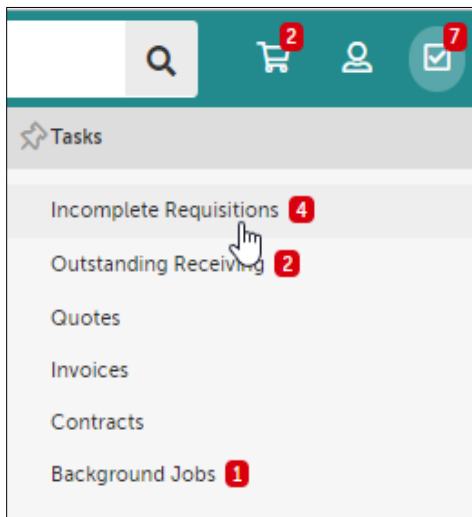
1. The users in your department that do not have SmartKey authority will be able to shop as a browser (upon request for access) and reassign their incomplete requisitions to you as the buyer. As the buyer, you will be alerted by email, with any applicable notes, from OneSource@ctwonesource.wesleyan.edu when an incomplete requisition has been assigned to you. See example email alert below.



- 2.

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- To find and process this incomplete requisition, go to the Tasks menu and Incomplete Requisitions.



- In the Incomplete Requisitions page, you will see all requisitions that have been assigned to you for completion. Click the requisition number to open and review the details or click Checkout to begin the checkout for completion of the requisition and routing for approval.

Viewing Order

- Orders that have been created can be viewed in the Orders area of the information section of the Dashboard or from the Order menu and View Orders page.

Orders			
Airgas	PE100136	3/14/2019 2:50 PM	\$34.75
Airgas	PE100135	3/14/2019 2:44 PM	\$21.24
Grainger	PE100134	3/14/2019 11:53 AM	\$24.00
Grainger	PE100133	3/14/2019 11:54 AM	\$2.00

[View orders](#)

- If the order is visible, click on the **order** from the list.
- If the order is not visible, click **View all orders** to see all of your orders.
 - The View Orders screen will appear.
 - The top portion of the screen will allow you to search for an order. Select from one or more of the following search options and then click the **Search button**.
 - Order Number**
 - Supplier**
 - Created Date**
 - Order Type**
 - Buyer**
 - Receiving Status**

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- vii. **If the Order has been invoiced or not**
 - viii. **Organization Unit**
 - ix. **Order Status**
- c. To select an order, click on the **Order number** from the list.

Orders

Order Number: Supplier: Created Date: Last 90 Days

Connected Suppliers Only Customize Dates

Order Type: Buyer: Receiving:

Has Accepted Invoice: Organization Unit: Order State:

Payment Method:

Showing 1 to 20 of 68
<< 1 2 3 4 >>

Order	Receiving	Type	Buyer	Requisition	Supplier	Order Date	Total
OSP0000094	Open	Standard	Valerie Nye	OSR0000148	Photo's R U	5/17/2019 10:44 AM	\$150.00
OSP0000093	Open	Standard	Valerie Nye	OSR0000147	WB Mason	5/17/2019 10:37 AM	\$75.00

Exporting Order Reports

From the View Orders page, you can use the down arrow on the search button to Export the current search results into an excel spread sheet with the header level report or an export of the line item detail.

Export Orders

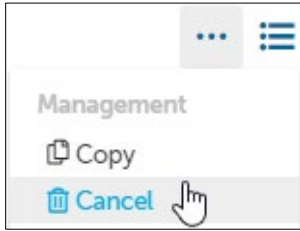
Export Order Lines

#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
	OrderNumber	OrderType	PaymentMethod	PaymentStatus	RetrofitOrder	CreatedDate	OrderDate	OrderState	ReceivingState	HasAcceptedInvoice	RequisitionNumber	BlanketOrder	Organisation	OrgUnit	Buyer
1	OSP0000094	Standard	On Account		FALSE	5/17/2019 10:44	5/17/2019 10:44	Open	Open	FALSE	OSR0000148		Wesleyan University	Wesleyan University	Valerie Nye
2	OSP0000093	Standard	On Account		FALSE	5/17/2019 10:37	5/17/2019 10:37	Open	Open	FALSE	OSR0000147		Wesleyan University	Wesleyan University	Valerie Nye
3	OSP0000092	Standard	On Account		FALSE	5/17/2019 10:34	5/17/2019 10:34	Open	Open	FALSE	OSR0000138		Wesleyan University	Wesleyan University	Valerie Nye
4	OSP0000091	Standard	On Account		FALSE	5/17/2019 14:18	5/17/2019 14:18	Closed	Closed	FALSE	OSR0000141		Wesleyan University	Wesleyan University	Ravindra Patil
5	OSP0000090	Standard	On Account		FALSE	5/1/2019 13:17	5/1/2019 13:17	Open	Closed	FALSE	OSR0000125		Wesleyan University	Wesleyan University	Valerie Nye
6	OSP0000089	Standard	On Account		FALSE	5/1/2019 13:08	5/1/2019 13:08	Open	Open	FALSE	OSR0000134		Wesleyan University	Wesleyan University	Valerie Nye
7	OSP0000088	Standard	On Account		FALSE	4/30/2019 8:51	4/30/2019 8:51	Open	Open	FALSE	OSR0000139		Wesleyan University	Wesleyan University	Ravindra Patil
8	OSP0000087	Standard	On Account		FALSE	4/29/2019 13:35	4/29/2019 13:35	Open	Open	FALSE	OSR0000136		Wesleyan University	Wesleyan University	Valerie Nye
9	OSP0000086	Standard	On Account		FALSE	4/26/2019 16:59	4/26/2019 16:59	Canceled	Closed	FALSE	OSR0000132		Wesleyan University	Wesleyan University	Ravindra Patil
10	OSP0000085	Standard	On Account		FALSE	4/25/2019 16:54	4/25/2019 16:54	Closed	Closed	FALSE	OSR0000131		Wesleyan University	Wesleyan University	Ravindra Patil
11	OSP0000084	Standard	On Account		FALSE	4/25/2019 15:12	4/25/2019 15:12	Open	Open	FALSE	OSR0000130		Wesleyan University	Wesleyan University	Ravindra Patil
12	OSP0000083	Standard	On Account		FALSE	4/25/2019 8:58	4/25/2019 8:58	Open	Open	FALSE	OSR0000129		Wesleyan University	Wesleyan University	Ravindra Patil

Canceling an Order

An order can only be canceled if the order has not been invoiced or marked as having any receiving history. Some suppliers with Order Integration () can disable the ability to have a canceled order since they are processing the orders as quickly as possible. If an order needs to be canceled, contact the supplier to cancel the order or return the order once received. This would be the supplier's preferred process if they have disabled the ability to cancel an order in **OneSource**.

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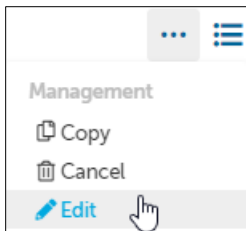
To cancel an order that has not been received against or invoiced:

1. Locate and view the order from the View Orders screen
2. Select Cancel from the Action options in the top right
3. Confirm that you want to cancel the order

The supplier will be notified via email that the order has been cancelled and you as the buyer will be CC'd for any added discussion through a reply all email. The order will also be canceled in WFS and the encumbered funds released.

Changing an Order

An order can only be changed if the order has not been invoiced or marked as having any receiving history. Some suppliers with Order Integration (🔒) can disable the ability to have change orders done since they are processing the orders as quickly as they can. If an order needs to be changed, contact the supplier to cancel the order and/or create a new order and return the initial order once received. This would be the supplier's preferred process if they have disabled the ability to change an order in **OneSource**.



To change an existing order that has not been received against or invoiced:

1. Locate and view the order from the View Orders page and select Edit in the Action items at the top right of the page.
2. A new incomplete requisition will be created with the original order details and will be placed into the checkout.
3. The original order details will be copied and can be modified as required from within the checkout screen. This includes Quantity, SmartKey, billing and shipping addresses as well as other related information like notes and attachments.
4. Non-Catalog items can also be changed by selecting the "Edit product" option on the line item that you wish to edit the details on.

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Unit price	Qty.	Subtotal	Tax	
\$15.00 / Each	<input type="text" value="1"/>	\$15.00	\$0.00	Remove Edit product

5. You can add items from your shopping cart to this change (incomplete Requisition) by using the Move feature as well.
6. Once you have the desired changes made, click Checkout.

The modified order will be routed for approval again IF the SmartKey codes changed or the total value of the order is higher than the original. If the modifications to the order do not change the SmartKey or increase the value, the changed order will be created with a new order number referencing the original order as a Change Of Order.

Once approved, a new order will be generated and sent to the supplier with a reference to the changed order. The Change Of Order link will provide an audit trail for the previous order. The original order will be canceled with a notification to the supplier and cancellation in Banner to release the funds.