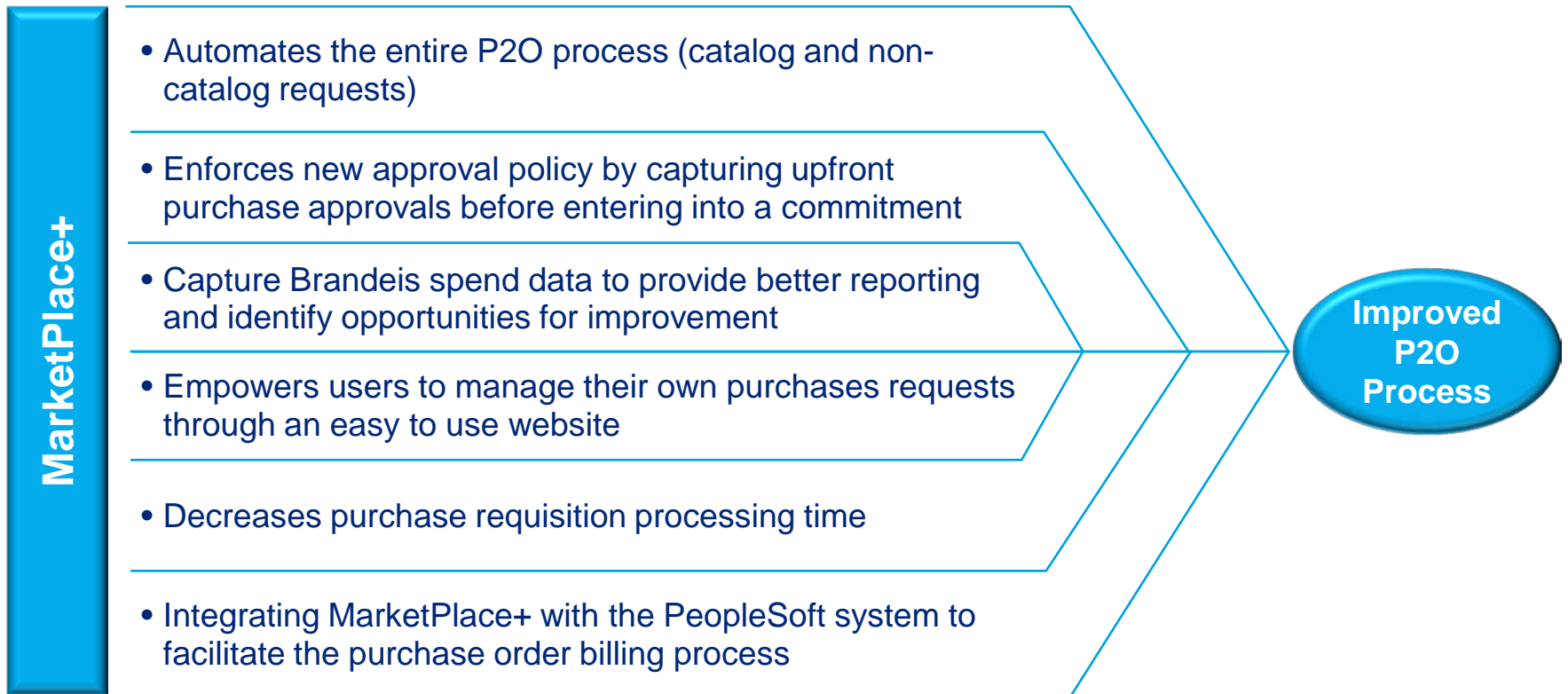




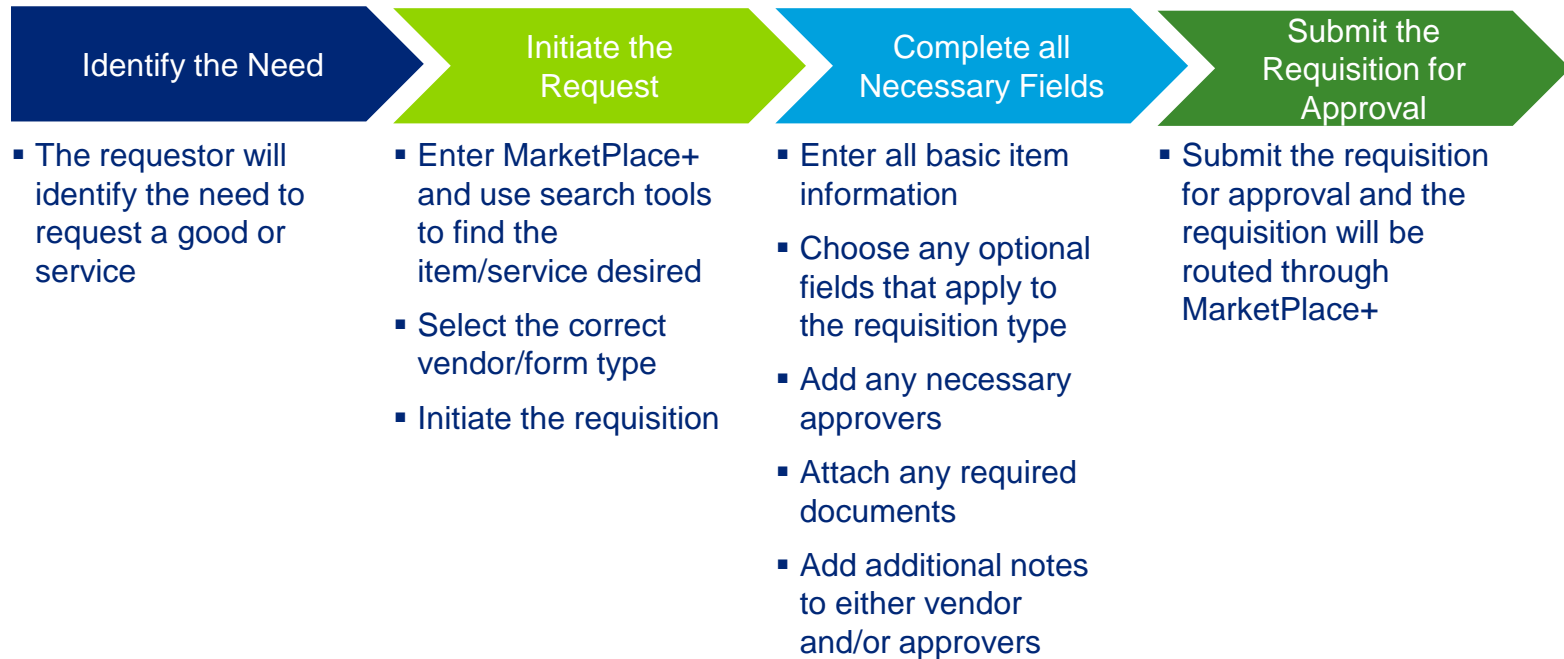
Brandeis University

MarketPlace+ End User Training

How will MarketPlace+ improve the P2O process at Brandeis?

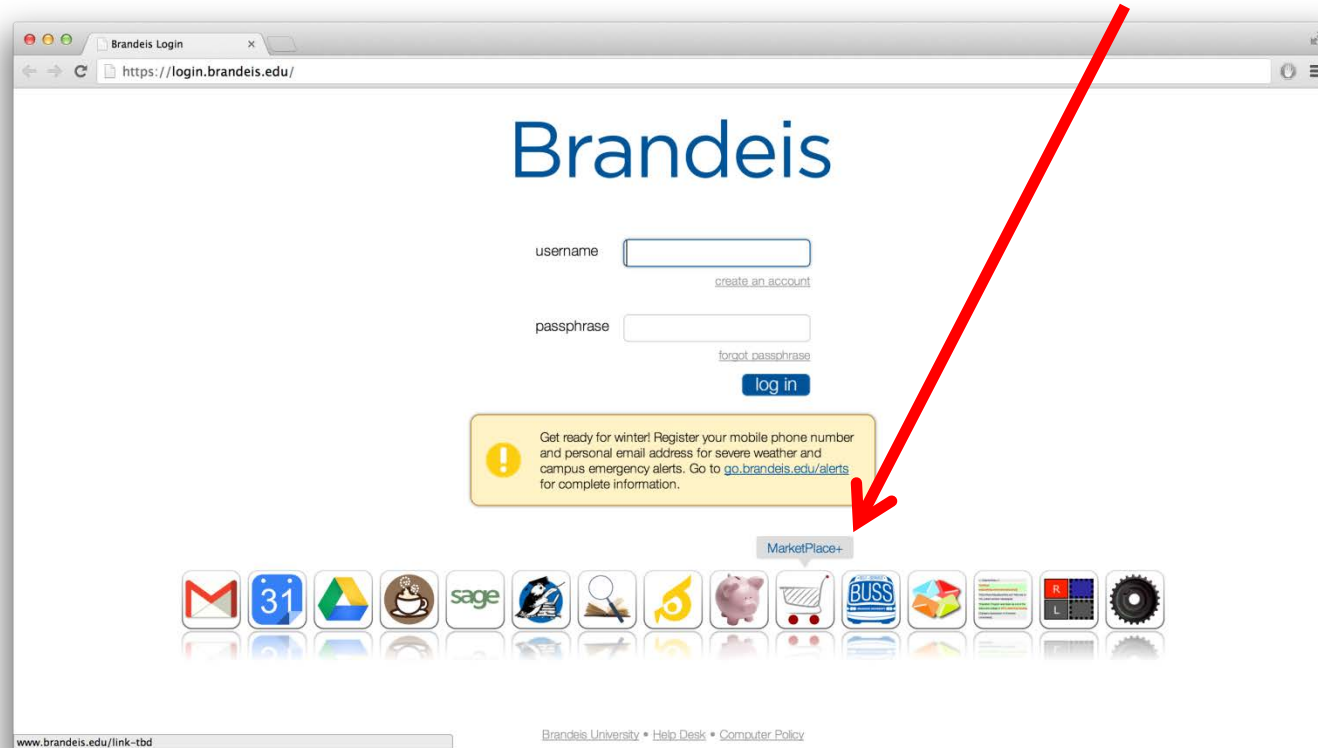


Requisition Creation Process Flows



How and Where to Access to MarketPlace+

MarketPlace+ is a single-sign on application available on your Brandeis Network Login page. After signing into the network, simply click the MarketPlace+ icon:



Access to MarketPlace+ can be requested at procurement@brandeis.com

MarketPlace+ Home Screen

1. **Home Button:** Will always take you back to the main dashboard
2. **Search Bar:** Where to start your search for a good or service
3. **“Search,” “Browse,” or “Write”:** Different options on how to start your search
4. **To Do’s:** List of items for you to take action on (click “View All” to access your complete list)
5. **Shop Online:** Shortcut to punch-out vendors

The screenshot shows the MarketPlace+ Home Screen for Brandeis University. At the top, the university logo and name are on the left, and user information (Hi Requisition Preparer), a cart icon with '0', and links for My Account, Help, and Sign Out are on the right. A blue navigation bar contains a home button (1), a search bar (2) with the text 'What do you need?', and three buttons: SEARCH (3), BROWSE, and WRITE (3). Below the navigation bar, there are sections for 'Recent Orders' (4) and 'To Do's' (4). The 'Recent Orders' section lists three items: a Tabletop Thermoelectric Water Cooler (111.30 USD), a Massage Lumbar Cushion With Heat (67.87 USD), and a 10-Cup Pour-O-Matic Coffee Brewer (112.00 USD). The 'To Do's' section lists two items: 'Req #63 has been returned by the buyer. Please Review and Submit' and 'Req #61 has been returned by the buyer. Please Review and Submit'. Below these sections is a 'Welcome to MarketPlace +' message and a 'Shop Online' section (5) with logos for Dell, Fisher Scientific, GovConnection, SIGMA Life Science, WVR We Enable Science, and WHO BUY W.B. MASON. At the bottom, there is a 'Training' button and contact information for the Coupa Administrator: Courtney Sampson, 781-736-4266, csampson@brandeis.edu.

MarketPlace+ Home Screen continued...

- 6. **Cart:** Takes you to your shopping cart and displays all items in the cart
- 7. **My Account:** Self service options: Where you can select a default Ship To Address, access to Inbox
- 8. **Policies:** Link to Brandeis Procurement policy
- 9. **Shop Online:** Shortcut to punch-out vendors

6

7

8

9

Brandeis University

Hi Requisition Preparer • Cart 0 My Account Help Sign Out

What do you need?

Order Lists Catalogs Policies

Recent Orders view all

To Do's view all

Older

1 Tabletop Thermoelectric Water Cooler, 13 1/4dia. x 15 3/4h, White Supplier WB Mason • Req 76 • 31 Oct • Draft	111.30 USD Actions
1 Massage Lumbar Cushion With Heat, 13w x 2-1/2d x 11-1/2h, Black Supplier WB Mason • Req 62 • 16 Oct • Draft	67.87 USD Actions
1 10-Cup Pour-O-Matic Coffee Brewer, Black Supplier WB Mason • Req 51 • PO 700064 • 16 Oct • Ordered	112.00 USD Actions

Req #63 has been returned by the buyer. Please Review and Submit
Hide Review

Req #61 has been returned by the buyer. Please Review and Submit
Hide Review

Escalated: Purchase Approval for Guy Burrowes - Requisition #10
Escalated to next approver, no action required.
Hide

Welcome to MarketPlace +

To get started with our new Coupa Procurement system, please review the information you received during training. You may also review the training site. Or you can also find helpful information on our Customer Care site.

Shop Online

Training

For any questions please contact your Coupa Administrator:
Courtney Sampson
781-736-4266
csampson@brandeis.edu

DELL Fisher Scientific
GovConnection SIGMA Life Science
WVR We Enable Science WHO BUY W.B. MASON

Using Search Features

Whether searching for invoices, PO's, or other items in Procurement Central, you can sort and filter by clicking the drop-down next to the "View" menu

Brandeis University

Hi Requisition Preparer • Cart 0 My Account Help Sign Out

My Spend History

Requisitions

Export View All Advanced

Req #	Requested By	Submitted On	Status	Orders	Items	Total	Actions
236	Requisition Preparer Test	None	Draft			0.00	
76	Requisition Preparer Test	10/31/13	Draft		1 Tabletop Thermoelectric Water Cooler, 13 1/4dia... from WB Mason for 111.30 USD	111.30	
62	Requisition Preparer Test	None	Draft		1 Massage Lumbar Cushion With Heat, 13w x 2-1/2d ... from WB Mason for 67.87 USD	67.87	
51	Requisition Preparer Test	10/16/13	Ordered	#700064	1 10-Cup Pour-O-Matic Coffee Brewer, Black from WB Mason for 112.00 USD	112.00	
20	Requisition Preparer Test	10/10/13	Ordered	#700065	1 Crucible, Porcelain, 50mL, 37x61mm from Grainger for 5.39 USD	5.39	

Prev 1 2 3 Next

If you would like to drill down further to narrow your search, click the "Advanced Button" and an additional search criteria tool will open

Requisitions

Export View All Advanced

Req # is 236

Apply All of these conditions Cancel Search

Req #	Requested By	Submitted On	Status	Orders	Items	Total	Actions
236	Requisition Preparer Test	None	Draft			0.00	
76	Requisition Preparer Test	10/31/13	Draft		1 Tabletop Thermoelectric Water Cooler, 13 1/4dia... from WB Mason for 111.30 USD	111.30	
62	Requisition Preparer Test	None	Draft		1 Massage Lumbar Cushion With Heat, 13w x 2-1/2d ... from WB Mason for 67.87 USD	67.87	
51	Requisition Preparer Test	10/16/13	Ordered	#700064	1 10-Cup Pour-O-Matic Coffee Brewer, Black from WB Mason for 112.00 USD	112.00	
20	Requisition Preparer Test	10/10/13	Ordered	#700065	1 Crucible, Porcelain, 50mL, 37x61mm from Grainger for 5.39 USD	5.39	

Prev 1 2 3 Next

Use the desired criteria from the drop down menus and field to find what you are looking for

Requisitions

Requisitions are requests for purchases that must be approved in order to become a Purchase Order. With very few exceptions, all purchases now require a Purchase Order before they may be purchased from the vendor. Here is a look at the information captured on a basic requisition

1. Header Level- Basic information regarding the source and destination of the request
2. Line Level- Requisition details, including the types of items, quantities, total costs, and billing information
3. Approval Chain- As it is built based on the user and requisition criteria requested

Brandeis University Hi Requisition Preparer • Cart 1 My Account Help Sign Out

Review Cart

Created By: Requisition Preparer Test

On Behalf Of: Courtney Sampson Clear

Department: Procurement Services

Justification:

Attachments: Add File | URL | Text

Tr: Please bill based on SOW milestones (Supplier)

Budget Date:

Ship To

Address: 60 Turner Street
Waltham, MA 02453
United States

Attention: Courtney Sampson
















Cart Items	Billing
Training services 7,500.00 USD From AMERICAN PLANT MAINTENANCE Commodity Facilities Services • Need By 11/22/13	csampson-11-72000-11000-NA csampson-7239
Total 0 Units 7,500.00 USD	

Approval Chain

Add Requisition Preparer Test on behalf of Courtney Sampson Buyer Action Pending John Storti

Save for Later Save Submit for Approval




MarketPlace+ Icons and Terminology

Icon	Action/Function
	Transaction Hyperlinks take you to the View page of the transaction
	Edit
	Save
	Print View of the PO in liquid HTML format
	Send PO to the supplier via method defined in the record
	Copy Requisition for future uses
	Void
	Receive
	Create invoice against the PO
	Close PO
	Delete
	Export table to Excel
	Detailed Receipt
	Add (ie: comment, alerts, invoice lines)
	Schedule a report for distribution via email

Requisition Creation

Creating a Requisition in MarketPlace+

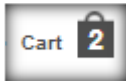

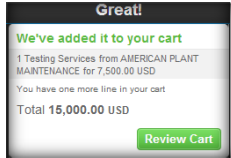


Punch-out Catalog

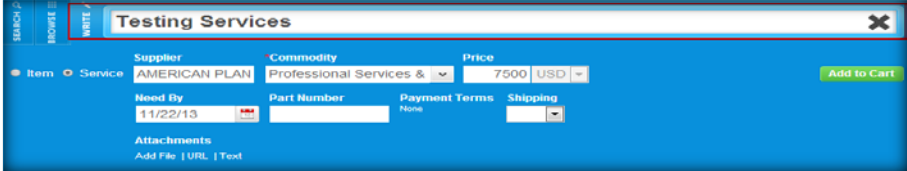
1. Access MarketPlace+ from the Brandeis Network log-in page
 2. Search for keyword (i.e.: “pens”) in the Search Bar and/or click on the vendor’s icon at bottom of page if you know the source of the product (for example: office products = WB Mason)
 3. Build a cart on the Punch-out site by selecting desired items on the vendor’s catalog website
 4. Check Out of vendor’s catalog to bring items back to MarketPlace+
 5. If entering the order for another person, enter the name in the "On Behalf Of" field, this will build the approval chain based on that person’s management hierarchy
 6. Enter a Justification if a note is required for the purchase (why you are buying this)
 7. Select a “Ship To” address for order delivery **Note:** You can select a default address for all your orders or change this info if necessary by using the magnifying glass icon  to search for another address
 8. Assign a Billing Code (Chart String and Account). If multiple GL codes are necessary, select the split billing icon  and add additional codes for each item
- Note:** Details such as price, supplier, part number are not editable for catalog items.
9. The required approval chain is automatically built. Review and add approvers or watchers (FYI) at the beginning or the end of the approval chain if necessary by clicking the “Add” icon 
 10. Click "Submit for Approval"



Creating a Requisition in MarketPlace+

Free Form

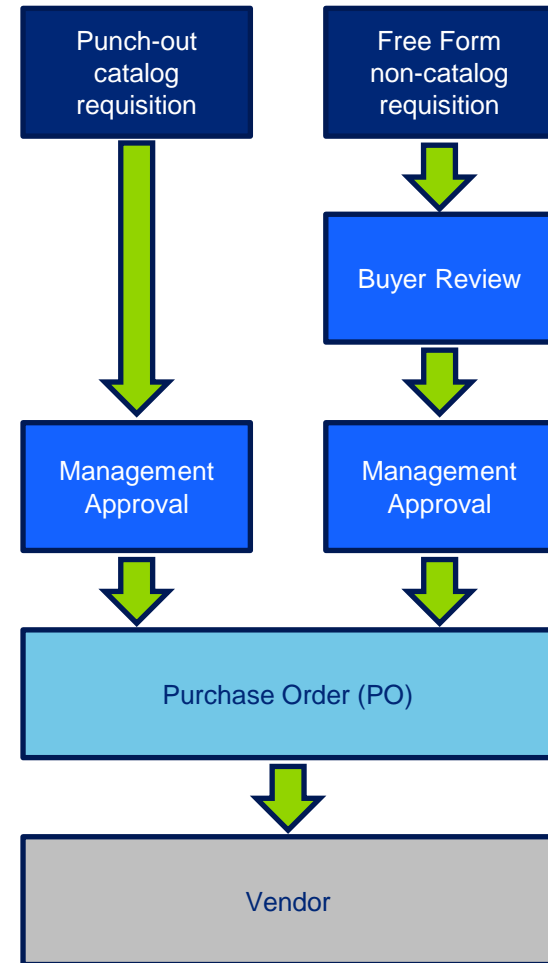
1. Type in the Search Bar for a desired good or service and click enter. If the item does not have a Punch-out or catalog associated with it, click on the "WRITE" tab
2. Select the appropriate radio button for "Service" or "Item" (This will default from your previous choice)
3. Begin to type in the vendor name if known
4. Glide your mouse over the name of the vendor to reveal its address as choices appear. If you do not see the desired vendor notify the MarketPlace Administrator. **Note:** New suppliers and/or supplier updates are maintained by the MarketPlace+ Administrator
5. Select the appropriate commodity from the dropdown list
6. Enter details for the order such as "Price", and Click "Add to Cart" when complete
7. Click on "Review Cart" to go to Check Out  or  
8. Assign a Billing Code (Chart String and Account). If multiple GL codes are necessary, select the split billing icon  and add additional codes for each item
9. The required approval chain is automatically built. Review and add approvers or watchers (FYI) at the beginning or the end of the approval chain if necessary by clicking the "Add" icon 
10. Click "Submit for Approval"



The screenshot shows a search results window titled "Testing Services". It includes a search bar with "Testing Services" entered. Below the search bar, there are fields for "Supplier" (AMERICAN PLAN), "Commodity" (Professional Services & ...), and "Price" (7500 USD). There are also fields for "Need By" (11/22/13), "Part Number", "Payment Terms" (None), and "Shipping". An "Add to Cart" button is visible on the right. At the bottom, there are "Attachments" options: "Add File", "URL", and "Text".

Requisition Approvals and Purchase Order (PO)

1. Punch-out catalog requisitions under \$5,000 will be automatically approved in MarketPlace+ and a PO will be sent electronically to the vendor for order fulfillment
2. Punch-out catalog requisitions above \$5,000 will be automatically routed in MarketPlace+ to the first person in the approval chain for review
3. Free Form or Non-catalog purchases will be routed to the Procurement department for Buyer Review. After Buyer Review, the requisition will be automatically routed in MarketPlace+ to the first person in the approval chain for review
4. Management Approvers will receive an email notification from MarketPlace+ for the requisitions they need to review
5. The Approvers will review the requisitions and can Approve or Reject from the email or within the MarketPlace+ system
6. Rejected requisitions can be updated and resubmitted for approval
7. Approved requisitions will be automatically converted into a PO and sent to PeopleSoft (for Budget Check and Future billing)
8. Buyers will transmit the non-catalog POs to the vendor



Receiving and Invoicing Process

- Receipts will not be processed in MarketPlace+
- The current Invoicing process does not change
 - Punch-out catalog invoices will be processed electronically
 - Free Form (non-catalog) invoices will be processed in PeopleSoft

Requisition Creation – Key Learning Points

General

- There are two order types: Punch-Out catalogs and Free Form
- A requisition can only have a single Ship To address at the header level
- All requisition lines must have a Category and Bill Code (Chart String/Account)
- Bill Codes can be split at the line level to allow greater Accounting flexibility
- You can enter order on behalf of any other user in the system
- The system will build the approval chain based on your supervisor assignment or the person you are ordering on behalf of
- System generated approval chains cannot be overridden, but additional Approvers or Watchers (FYI) can be added to the approval chain
- Approvers will be reminded to approve after 24 hours / Requisitions will be escalated after an additional 48 hours
- The approval function can be delegated to another user
- Order All changes to approved requisitions (POs) must be initiated by contacting Procurement Services

Policy Implications

- All requests for purchases of goods and services not on a p-card should be entered MarketPlace+
- Purchases above \$5,000 will require an approval in MarketPlace+
- All vendors must be approved and entered into PeopleSoft and then MarketPlace+ by the Administrator; PeopleSoft is the source system for all vendor data

FAQs

- How can I delete a single line item from a requisition I am creating without deleting the entire request?
 - While in “Edit” mode, there is an option to select a single check box to the left of each item. Click that box next to the item you wish to delete, and then select “Delete from the option just above the requisition line
- How do I edit a single line of a requisition?
 - When in “Edit” mode, float the mouse over the line you wish to edit. You will see the line highlight, and the pencil icon appear. By clicking on that line you may change the contents of that requisition line until it has been sent on to the next approver
- Do I need to “Save” a requisition before sending?
 - No, you can submit the invoice for approval and it will automatically save, but it is always a good idea to save in case there is an issue with the internet connection while sending
- Can I edit the bill code while making changes to a requisition?
 - Yes, but you must “Save” and get out of the “Edit” mode. You cannot make changes to the bill code while making changes to the line item
- How many ways are there to tell MarketPlace+ to send a comment or file to the supplier?
 - You can tell the system to send your text or file attachment to the vendor either when creating the attachment by clicking the “Send to Supplier” note, or anytime in “Edit” mode by floating the mouse over the attachment, and then clicking the appropriate box. You can also delete that attachment by clicking the “X” next to that checked box



FAQs continued

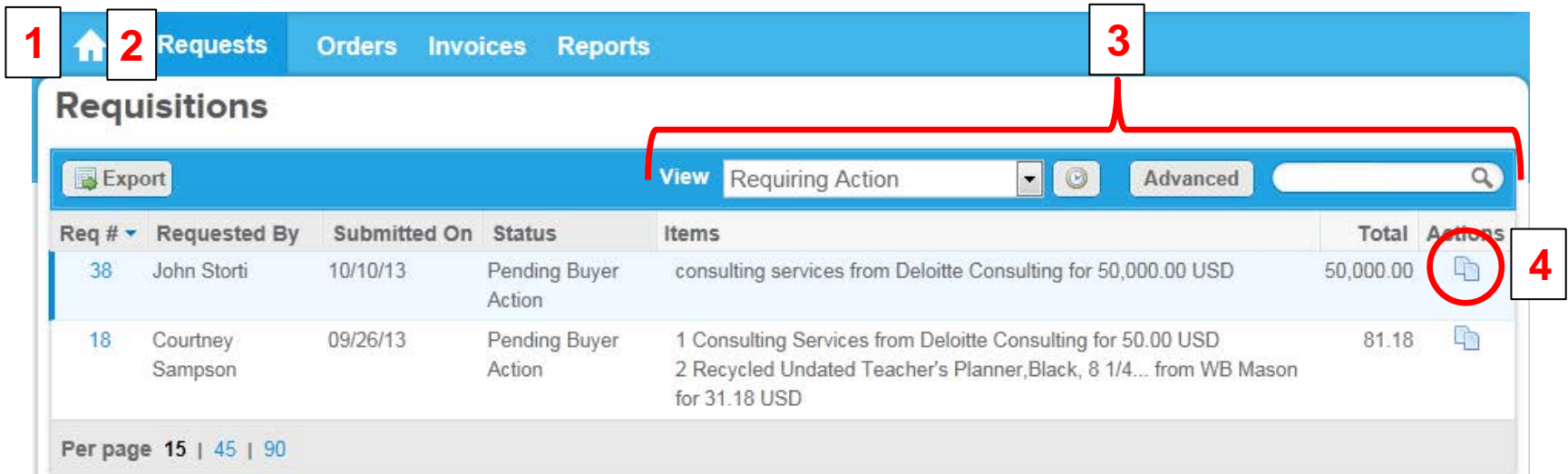
- What is the difference between a “Vendor” and a “Supplier?”
 - In reference to MarketPlace+ and Brandeis University, these terms are one in the same. At Brandeis University, we refer to companies from which we purchase as “Vendors,” but the MarketPlace+ application refers to them as “Suppliers,” and this cannot be changed in the system. The terms may be used interchangeably
- What does it mean to add a “Watcher” to the approval chain?”
 - This means that someone will be made aware that the requisition is being made but they do not need to approve of the purchase in order for it to be processed
- What is the difference between the “Comment” field at the bottom of the requisition and the text comments I make in the header level of the requisition?
 - The “Comments” field can be used to make notes for others in the approval chain during the requisition process, but they will not appear on the Purchase Order once complete. The text comments made in the header will appear on the PO, and be sent to the supplier if desired
- Why does the “Buyer Action” appear in my approval chain?
 - Anytime you initiate a Free Form requisition, the buyer approval is added automatically to ensure that the products or goods you are sourcing are from the approved sources. This helps us to make sure we are getting the best deal possible for Brandeis University

Additional Functionalities



Additional Functions in Requisition Creation

#1. Using the “Copy” Function to create a requisition

1. Access MarketPlace+; if already logged in, click the home icon in the top left
2. Click on the “Requests” tab in the top line
3. Choose a Requisition or use the search function to locate a specific requisition
4. Click on the “Copy Requisition” icon 
5. You will see a screen displaying your newly created requisition in “Draft” status. You may edit the new requisition as needed (it will have a unique requisition number, different from the original)
6. Click "Submit for Approval" when ready 





The screenshot shows the MarketPlace+ interface. At the top, a navigation bar contains a home icon (1), the 'Requests' tab (2), and other tabs: 'Orders', 'Invoices', and 'Reports'. Below this is the 'Requisitions' section. A red line (3) highlights the search area, which includes an 'Export' button, a 'View' dropdown menu set to 'Requiring Action', a refresh icon, an 'Advanced' filter button, and a search input field. The main content is a table with columns: 'Req #', 'Requested By', 'Submitted On', 'Status', 'Items', 'Total', and 'Actions'. The first row (Req # 38) is highlighted, and its 'Actions' column contains a copy icon (4). The second row (Req # 18) is also visible. At the bottom, there is a pagination control showing 'Per page 15 | 45 | 90'.

Req #	Requested By	Submitted On	Status	Items	Total	Actions
38	John Storti	10/10/13	Pending Buyer Action	consulting services from Deloitte Consulting for 50,000.00 USD	50,000.00	
18	Courtney Sampson	09/26/13	Pending Buyer Action	1 Consulting Services from Deloitte Consulting for 50.00 USD 2 Recycled Undated Teacher's Planner, Black, 8 1/4... from WB Mason for 31.18 USD	81.18	

Additional Functions in Requisition Creation

#2. Adding an additional item to a requisition in progress

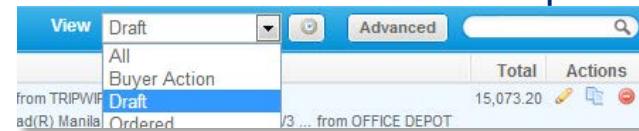
1. Access MarketPlace+; if already logged in click the home icon in the top left
2. Open a requisition that is in “Draft” status
3. Select "Add Line"  while the requisition is in “Edit” mode (located below the last line item in the current requisition). You may have to scroll to the bottom of the requisition and click the “Edit” button  to enter Edit mode
4. Select "Service“ or “Item” as appropriate by selecting the radio button




Item Service

5. Type in the item desired into the “Item” field. Suggestions will automatically begin to fill the field

*Item


6. Follow the instructions for either a “Local Catalog,” or “Free Form” purchase as appropriate to add a new line item request to your requisition. For a punch-out item, go to the punch-out catalog and order your items. The requested items will be brought into your requisition

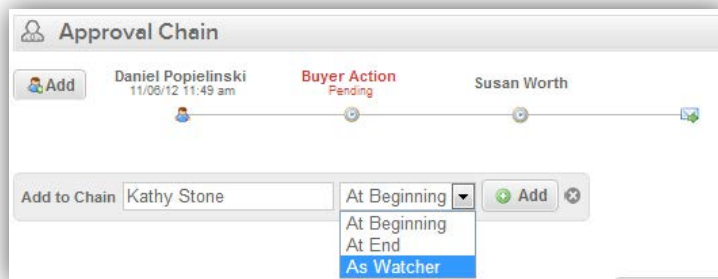


View	Draft	Advanced	Total	Actions
	All			
	Buyer Action			
from TRIPWIF	Draft		15,073.20	  
ad(R) Manila	Ordered	v3 ... from OFFICE DEPOT		

Additional Functions in Requisition Creation

#3. Adding a Watcher in the Approval Chain

1. Access MarketPlace+; if already logged in click the home icon in the top left
2. Select a requisition from the items awaiting your attention from the “To Do” list or create a new requisition
3. Scroll down to the approval chain and click "Add" 
4. Type in name of individual and select “As Watcher” from the pull-down menu



5. Click "Add"
6. Ensure individual is noted as a watcher below the approval chain

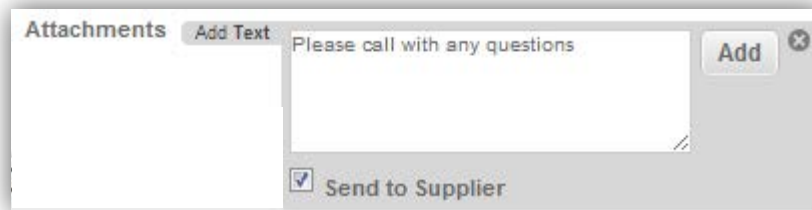
Additional Functions in Requisition Creation

#4. Adding a File or Text Comment to the Requisition

1. Access MarketPlace+; if already logged in click the home icon in the top left
2. Choose a requisition from the “Requisition” tab or from your “To-Do” list
3. In the attachments area click on the “File” or “Text” hyperlink:

Attachments [Add File](#) | [URL](#) | [Text](#)

4. To attach a file, browse as you would for an attachment in any common application, or enter in comments if you choose “Text”; if you want the supplier to see the comments, click the "Send to Supplier" check box that will appear below the text box, otherwise the comments will only be visible to the approvers in the chain



The screenshot shows a user interface for adding attachments. It features a header with the word "Attachments" and a tab labeled "Add Text". Below this is a text input field containing the text "Please call with any questions". To the right of the input field is an "Add" button with a close icon (X). Below the input field is a checked checkbox labeled "Send to Supplier".

5. Click "Add"

Year-end Purchases

- If a purchase should not be recorded until the next fiscal year, then the Budget Date field should be populated at the Requisition Header
- The Budget Date will override the Order Date on the PO that is sent over to PeopleSoft (the normal Order Date defaults as the system date)

Review Cart


Created By Buyer Test

On Behalf Of [Clear](#)

Department

Justification

Attachments [Add File](#) | [URL](#) | [Text](#)

Budget Date 

Ship To

Address 60 Turner Street
Waltham, MA 02453
United States
Attn: Procurement Dept. 2nd Floor

Attention

Reporting

Navigating My Spend History

My Spend History Provides the User with access to the details of all requisitions created by that individual

Click the "My Account" hyperlinked text or mouse over and click the "My Spend History" link

This menu loads every requisition you have created in every status from Draft through Received (after being converted to a PO)



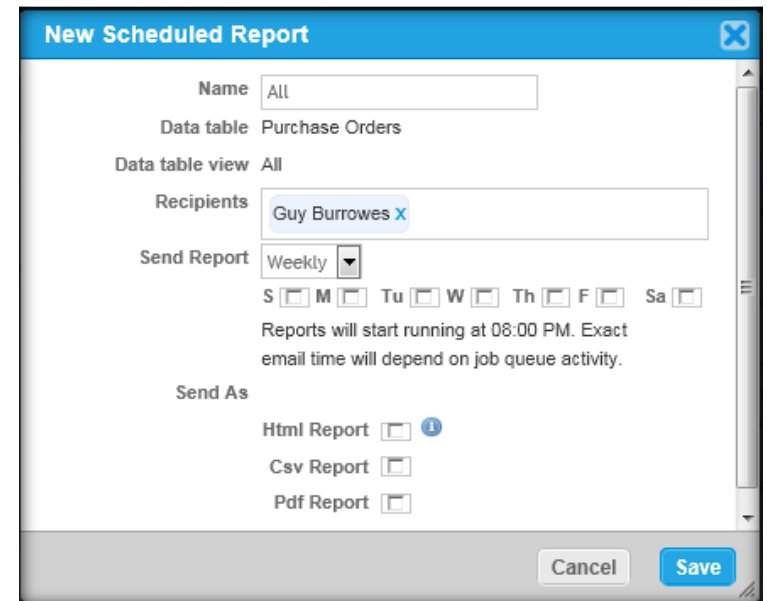
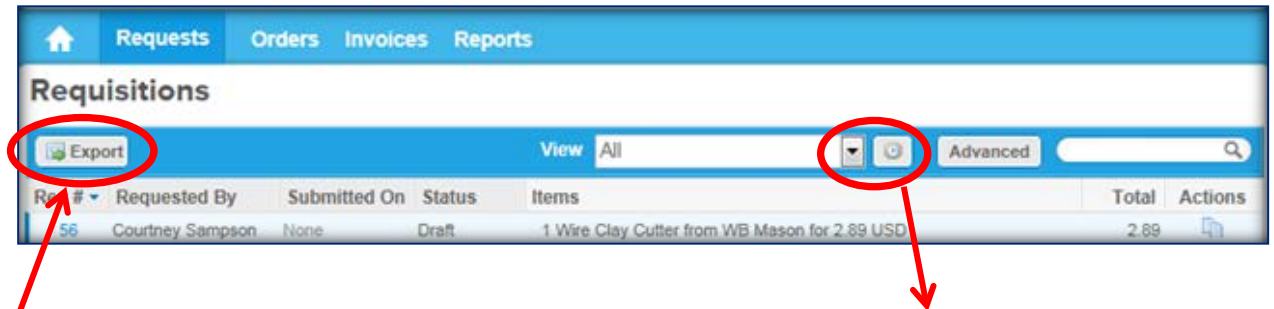
Scheduling Data Reports via Email and Using Export

Once you have the desired data view, click the clock icon to schedule a report to send to recipients.

Note: In order for MarketPlace+ to send an automated report, the recipient must be a user in MarketPlace+

Views can also be Exported to Excel by selecting the Export button at the top of any View.

Note: If the file size is large, the report output will be emailed to you.



Custom Views

The user can also create a custom view of the information

1. Click the “View” dropdown from the Spend History screen
2. Select "Create view"
3. Select viewing criteria from the “General” and “Conditions” dropdown menus
4. Drag any desired fields from the “Available” columns to the “Selected” columns to construct the custom view
5. Specify “Default Sort Order” from drop down
6. Click “Save”

My Spend History

Requisitions

Req #	Requested By	Submitted On	Status
52	Guy Burrowes	None	
10	Guy Burrowes	10/10/13	

Orders

Total	Actions
0.00	
newegg.com for 209.99	209.99

Create New data table view

General

Name:

Visibility: Only Me Everyone

Start with view:

Conditions

Apply of these conditions:

Columns

Available columns	Selected columns
Req #	Orders
Status	Items
Submitted On	Total
Requested By	
Name	

Default Sort Order

Sort by in order.

Cancel Save

Support

The Procurement Services website contains all support material

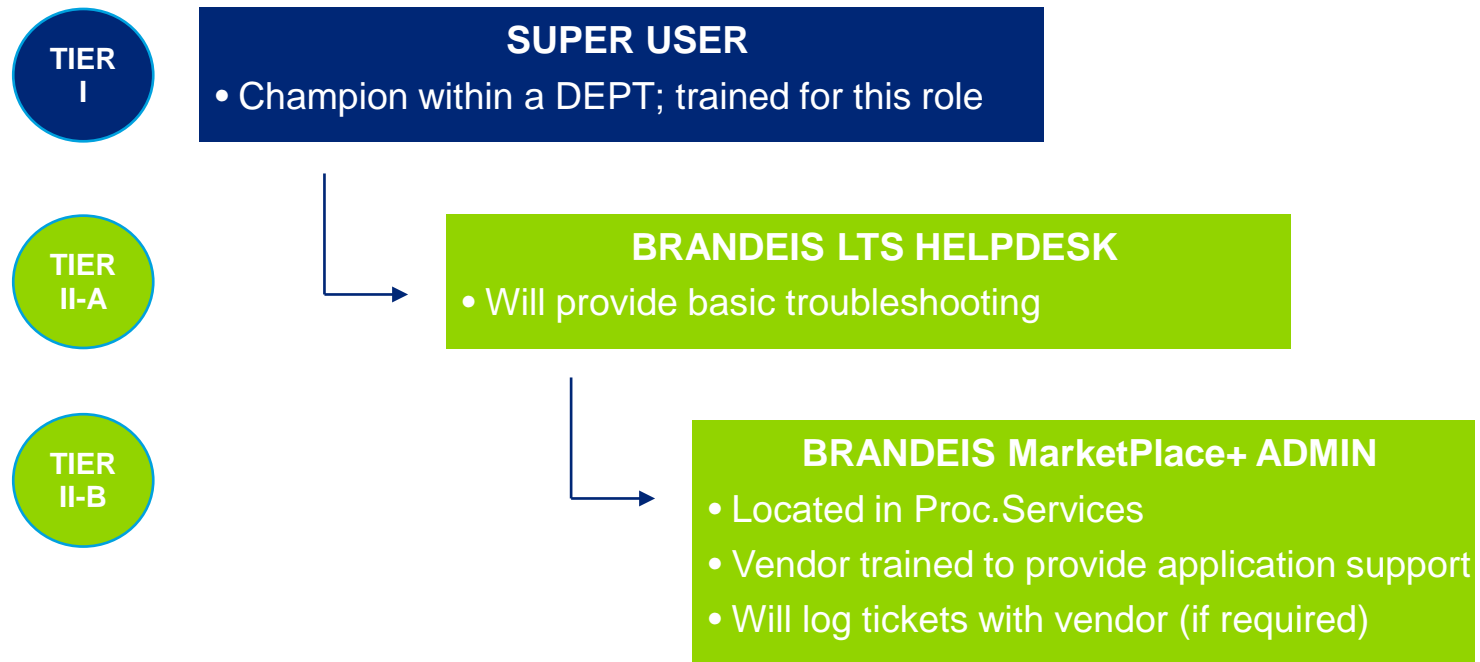
MarketPlace+ Supplier and Account requests can be made by submitting a request to procurement@brandeis.edu

- Supplier, Account and User account forms and MarketPlace+ training materials can be found on the Brandeis University Procurement services website: <http://www.brandeis.edu/financialaffairs/procurement/>

The screenshot shows the Brandeis University Procurement Services website. The header includes the Brandeis University logo and navigation links: ABOUT, ACADEMICS, ADMISSIONS/AID, ARTS, ATHLETICS, NEWS/MEDIA, RESEARCH, and STUDENT LIFE. The main navigation bar is titled 'Procurement Services' and includes a search bar and radio buttons for 'BRANDEIS.EDU' and 'THIS SITE'. The sidebar on the left contains the following links: CONTACT US, PROCUREMENT POLICY, SOLE SOURCE/PRICE JUSTIFICATION, PROCUREMENT CARD, UNIVERSITY CONTRACTS, FORMS, DISCOUNTS FOR FACULTY AND STAFF, FOR SUPPLIERS, and HOME. Two red arrows point to 'CONTACT US' and 'FORMS'. The main content area features a photo of a building and a list of procurement staff: John Storti (Director of Strategic Procurement), Helen David, Mark Jay, Courtney Sampson, and Ellie Santisi. The footer includes the text: 'OVER \$125 MILLION IN ANNUAL PURCHASES' and 'Brandeis Procurement Services strives to be the leader in higher education procurement. Our goal is to deliver the highest quality customer service to the Brandeis community through an efficient and collaborative best-in-class sourcing and procurement process.'

Issues and Questions

The process for getting help and/or logging issues is very similar to the current support process for MarketPlace



Objectives Completed?

- ✓ Navigate the Requisition Creator Capabilities
- ✓ Understand the following:
 - ✓ Requisition/PO Creation
 - ✓ Reporting/Spend History
 - ✓ Requesting User Access
 - ✓ Requesting New Suppliers and Accounts
 - ✓ Where To Go For Help

For additional information about MarketPlace+ and links to training materials, please visit:

<http://www.brandeis.edu/financialaffairs/procurement/>