CTW OneSource

Buyer's Guide

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

Contents

Logging In

1. Open your web browser.

2. Log into <mark>Trinity College Intranet</mark> and find the link to CTW OneSource on the Tools tab
   OR
3. In the address field, type https://trincoll.unimarket.com/
4. The Trinity College CTW OneSource login page will appear.
5. Enter your Trinity College username and password and login.
6. Your CTW OneSource home page will appear.

If you experience any issues logging in, please contact eprocurement@Trinity.edu.

The Buyer Role in CTW OneSource

The Buyer role in CTW OneSource is assigned to those users who have the authority to make purchases using the College's funds based on the GL Account. Buyers in the CTW OneSource eProcurement system have the permissions for the following:

- Access suppliers in the online marketplace created specifically for Trinity College
- Search and browse the contracted pricing catalogs from the Trinity suppliers
- Request and receive quotes from preferred suppliers
- Fill an individual shopping cart for checkout
- Accept and process requests from other users (Browsers) in the department that do not have authority to use a specific accounting string
- Create requisitions for purchases against the Trinity accounting strings
- 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 CTW 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 and email address as well as set your default accounts. Setting your default account codes will make the checkout process more efficient if you use the same accounts repeatedly. It is NOT recommended that you set all parts of the account as a default as you may forget to change the Account for different types of purchases. You can also access the online Help provided by Unimarket in the Help page under the My Account menu.
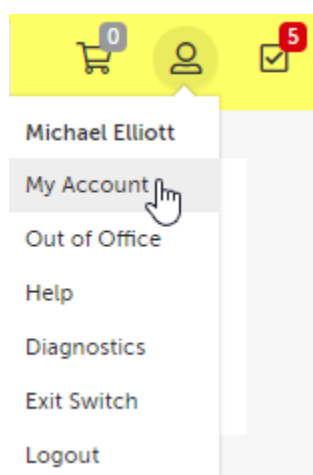
Key Concepts

- There is currently one type of supplier found in CTW OneSource:
  - **Premium Supplier** – supplier who has a catalog in the CTW OneSource marketplace or provides roundtrip/punchout access to their ecommerce site from CTW OneSource.
- Products to be ordered from a supplier can be accessed in one of two methods:

  - **&** **Hosted Catalog** – supplier products are "hosted" on the CTW OneSource website, meaning you do not leave the CTW OneSource website to search and order these products. Hosted Catalogs are identified with the folder icon.

  - **&** **Roundtrip/Punchout** – supplier products are found on the suppliers' ecommerce website with a direct link to and from CTW 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 Trinity account on the supplier's ecommerce site.

Searching

Products or Suppliers can be located by searching the loaded hosted catalogs or level 2 punchouts of suppliers using the search options detailed below.

Product Searching

Product searches can be completed using the search function in the title section of CTW OneSource. The loaded catalogs, index catalogs (products pointing to a punchout site) 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.

Search marketplace...	🔍

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.
- 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.

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

1. Click the down arrow at the right side of the search bar in the search area.
2. From the Advanced Product Search window, type the name of the product you are searching for in the Search field.
   NOTE: Any field marked with a red asterisk is a required field.

Any time you see a blue question mark, a help bubble will appear when resting your cursor over it.

3. If desired, select a **Tag** or **Supplier** from the drop-down list and/or type in or select a Product Category to narrow your search results.
4. Click **Search**.
5. 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".

Advanced Search		
Search * ❓		
Tag		
Supplier		
Category		🔍 Browse
	Search Cancel	

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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.

Filling your Shopping Cart

Shopping by Catalog

If a hosted catalog folder icon, appears (📁 **or** 📂) after clicking on the supplier name or icon, you will be selecting products from the supplier's hosted catalog on CTW 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.

3. Browse items individually or use the search bar to search within the selected catalog.
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.
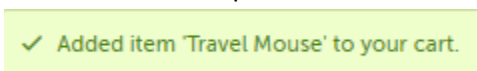
9. Repeat steps #3 – 9 for as many products as you need to order from this supplier.

Shopping by Roundtrip (Punchout)

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

1. Click the **supplier** that you wish to shop from the marketplace.
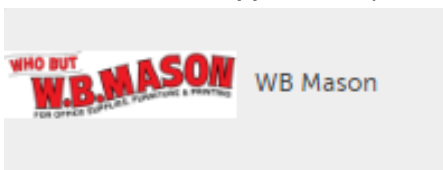
2. Click the **roundtrip icon** or **supplier name** to go to the supplier's website.

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 CTW OneSource.
   NOTE: The terminology of the button to click will vary based on the supplier's website.
6. You will be returned to your shopping cart in CTW 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, consult your administrator or IT support to look at your browsers settings.

Shopping Cart

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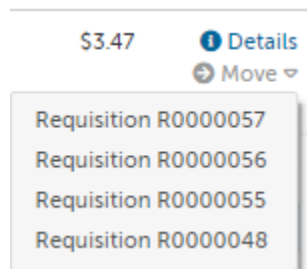
Reviewing the Shopping Cart

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.
3. 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.
4. To remove any product from the cart, click the **red X icon** next to the Quantity field.
5. To remove all products from the cart, click **Clear Shopping Cart** in the upper right-hand portion of the screen. 🗑 Clear Shopping Cart
6. 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.

$3.47   ℹ️ Details
        ➤ Move ▽

Requisition R0000057

Requisition R0000056

Requisition R0000055

Requisition R0000048

Hewlett-Packard Co

	Product	Quantity	Price	Subtotal	
✔	Travel Mouse (RH304AA) Keywords: HP, Hewlett, Hewlett, Hewlett-Packard, Computer, Desktop, Laptop, Notebook, Wired, Mouse	1 ❌	$13.00 / Each	$13.00	ℹ️ Details ➤ Move ▽
✔				Supplier Total: $13.00 Checkout	

Cart Total: $16.47
Checkout All

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 if you are order the same the product(s) on a frequent basis.

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

2. The Create Shopping List screen will appear.

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 replace any current products that you have in your shopping cart.

Incomplete Requisitions from Browsers

The users in your department that do not have GL Accounting String authority will be able to shop and reassign their incomplete requisitions to you as the buyer. As the buyer, you will be alerted by email from ctw_purchasing@trincoll.edu when an incomplete requisition has been assigned to you. See example email alert below.

To find and process this incomplete requisition, go to the Tasks menu and Incomplete Requisitions.
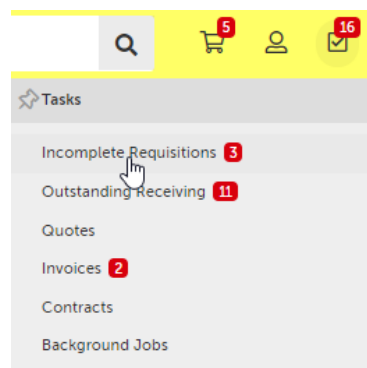
In the Incomplete Requisitions page, you will see all requisitions that have been assigned to you for completion. Click the requisition number to open and review the details or click Checkout to begin the checkout for completion of the requisition.

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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.

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Locations

The shipping and billing addresses will be selected in the Locations section of the checkout screen. These addresses are preloaded in CTW OneSource. If you select another location and complete the checkout, your selection will be your new default for your next checkout process. You can type the first letter of the location to navigate the dropdown list easily.

Attn Field

The Attention To field (Attn) 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.

Example:

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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.

3. Use the Account fields to enter the value of the required Account and Account String fields.
    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.
    b. You can begin typing the number or description of the Account String 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 Accounting String that you are trying to allocate for the line item.
    d. You can use the Copy Down button to repeat your selected accounts to each line below.

4. Delivery Date
    a. 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.

Lowes

Product	Delivery date
57704 ADJUSTABLE BULB PLANTER (57704-...	⏱ 12:00 PM ▼
ACCOUNT _ ACCOUNT STRING	

Notes and Attachments

5. Enter any delivery notes to your order in the Delivery Notes section of the checkout screen.
    a. The Delivery Notes 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 in Purchasing 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.
    b. You can also attach a file in the Order Attachments and chose not to send it to the supplier.

   c. You can attach as many documents as needed with a single file size limit of 50 megabytes
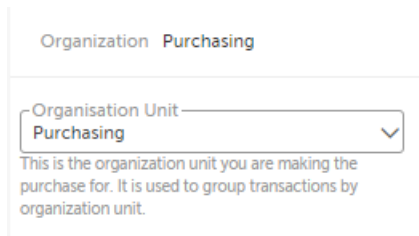
Delivery notes

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.

Drop files to attach, or browse

Size limit 50M.

Organization Selection

Under 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 Purchasing

Organisation Unit
Purchasing
This is the organization unit you are making the purchase for. It is used to group transactions by organization unit.

6. Select the Organization that is appropriate for your purchase. This will most likely match the Accounting String selected for your line items. 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 depending on your organizations structure.

Saving a Checkout

7. 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.

Tasks

Incomplete Requisitions **3**
Outstanding Receiving **11**
Quotes
Invoices **2**
Contracts
Background Jobs
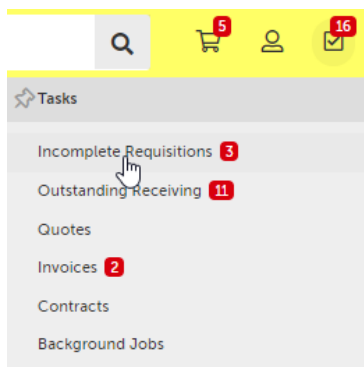
1. Once your checkout screen is complete with all the necessary information, click Checkout.

Checkout
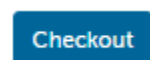
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Reassigning your cart

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

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

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.

Tracking Requisitions

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

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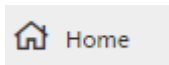
2. Requisitions that have been submitted can be viewed in the Requisitions in Progress area of the information section of the Dashboard.

Requisitions in Progress			
CDW-G	R10092	9/27/2018 4:04 PM	$15.00
			View requisitions

3. Click on the **requisition** from the list.
4. You may also click **View all requisitions** to see all your requisitions.
   a. The View Requisitions screen will appear.
   b. You can see the header level requisition information.
   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. Once a requisition has been checked out, a purchase order will be generated and sent to the supplier. An email 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.

Viewing Order

1. 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

   39   orders *(last 30d)*
           average value
           $3,200.12

   12   orders *(previous 30d)*
           average value
           $251.81
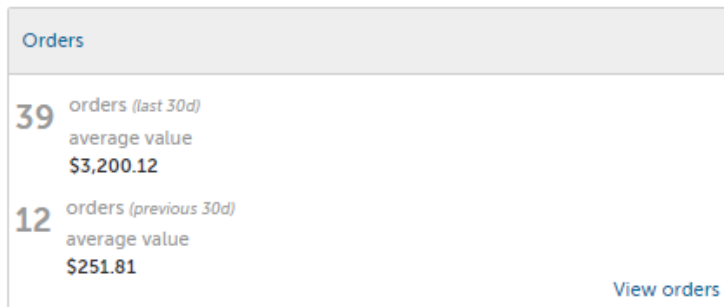
                                                    View orders

2. If the order is visible, click on the **order** from the list.
3. If the order is not visible, click **View all orders** to see all your orders.
   a. The View Orders screen will appear.
   b. 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 the click the **Search button**.
      i. **Order Number**
      ii. **Supplier**
      iii. **Created Date**
      iv. **Order Type**
      v. **Buyer**
      vi. **Receiving Status**
      vii. **If the Order has been invoiced or not**
      viii. **Organization Unit**
   c. To select an order, click on the **Order number** from the list.

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Orders

Order Number		Supplier		Created Date — Last 90 Days	× ∨
		☑ Connected Suppliers Only		☐ Customize Dates	
Order Type	∨ ❷	Buyer	∨ ❷	Receiving	∨ ❷
Has Accepted Invoice	∨ ❷	Organization Unit	∨	Order State	∨ ❷

Search ▽   ⌃

Order	Receiving	Type	Buyer	Requisition	Supplier	Order Date	Total
EP00033	Open	Standard	Michael Elliott	R000040	American Hotel Register	12/5/2018 2:57 PM	$298.45
EP00032		Blanket	Michael Elliott	R000039	Global Industrial Equipment Company	11/28/2018 11:57 AM	$10,000.00
EP00031	Open	Standard	Michael Elliott	R000038	American Hotel Register	11/28/2018 11:31 AM	$298.45
EP00030	Partial	Standard	Michael Elliott	R000037	Bio-Rad Laboratories	11/20/2018 4:26 PM	$373.00

Exporting Order Reports

1. 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.

Search ▽

Export Orders
Export Order Lines
Bulk Change
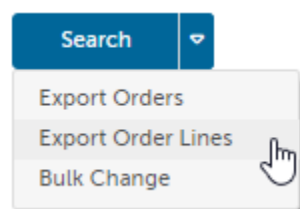
	A	B	C	D	E	F	G	H	I	J	K	L	M	N
	OrderNumber	OrderType	RetrofitOrder	CreatedDate	OrderDate	OrderState	ReceivingState	HasAcceptedInvoice	RequisitionNumber	BlanketOrder	Buyer	Supplier	Currency	Value
	UP100034	Standard	FALSE	3/14/2018 13:02	3/14/2018 13:02	Open	Open	FALSE	R100036		Eugenia Regencio	Office Depot	USD	28.49
	UP100033	Standard	FALSE	3/7/2018 17:01	3/7/2018 17:01	Open	Open	FALSE	R100032		Eugenia Regencio	Fisher Scientific	USD	46.2
	UP100032	Standard	FALSE	3/7/2018 16:59	3/7/2018 16:59	Open	Open	FALSE	R100031		Eugenia Regencio	Fisher Scientific	USD	46.2
	UP100031	Standard	FALSE	3/7/2018 16:59	3/7/2018 16:59	Open	Open	FALSE	R100030		Eugenia Regencio	Fisher Scientific	USD	46.2
	UP100030	Standard	FALSE	3/7/2018 16:56	3/7/2018 16:56	Open	Open	FALSE	R100029		Eugenia Regencio	Fisher Scientific	USD	46.2
	UP100029	Standard	FALSE	3/7/2018 16:54	3/7/2018 16:54	Open	Open	FALSE	R100028		Eugenia Regencio	Fisher Scientific	USD	46.2
	UP100028	Standard Release	FALSE	3/7/2018 16:52	3/7/2018 16:52	Open	Open	FALSE		UP100027	Eugenia Regencio	Fisher Scientific	USD	46.2
	UP100027	Blanket	FALSE	3/7/2018 16:51	3/7/2018 16:51				R100027		Eugenia Regencio	Fisher Scientific	USD	50,000.00
	UP100026	Standard	FALSE	3/7/2018 16:49	3/7/2018 16:49	Open	Open	FALSE	R100026		Eugenia Regencio	Fisher Scientific	USD	249.72

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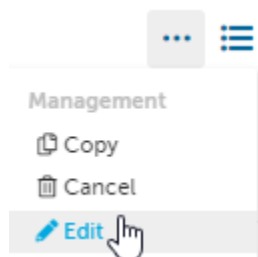
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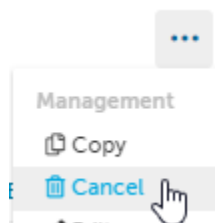
To cancel an order that has not been received against or invoiced:

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 canceled and you as the buyer will be copied for any added discussion through a reply all email.

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 Unimarket.

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, GL Account, Billing and Shipping addresses as well as other related information like notes and attachments.

4. Once you have the desired changes made, click Checkout.

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.