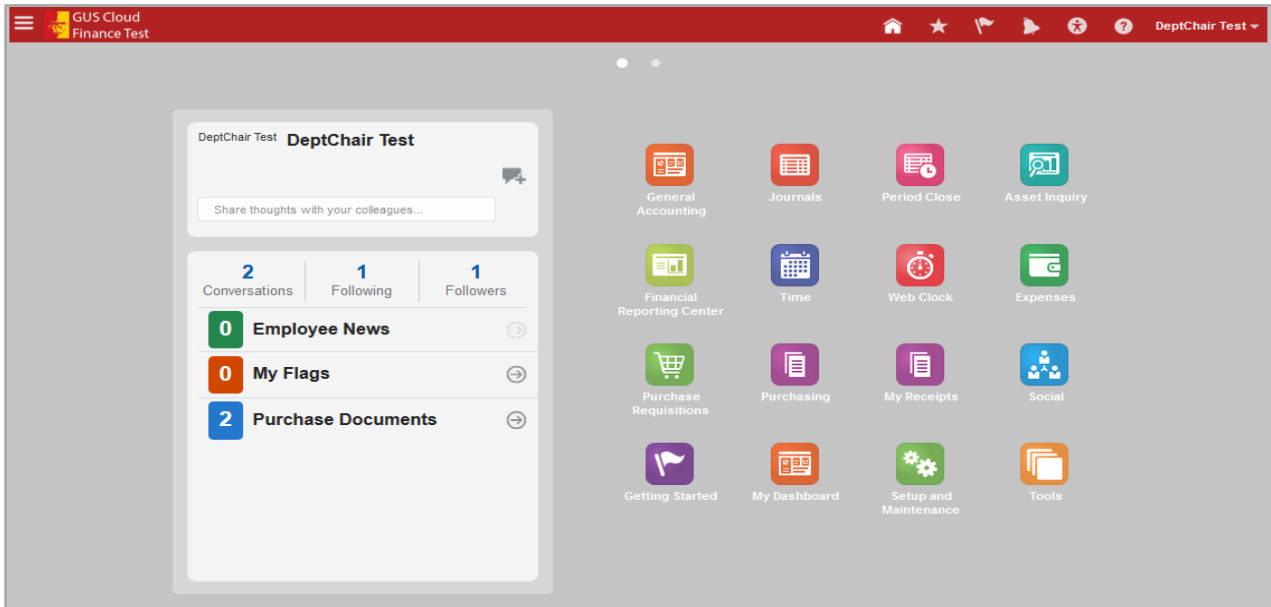





Job Aid

Shopper Punchouts



This Job Aid walks through the process of adding your shopper requisition preferences (favorites), shopping a punchout and then reassigning that order to another user in the Procurement Module.

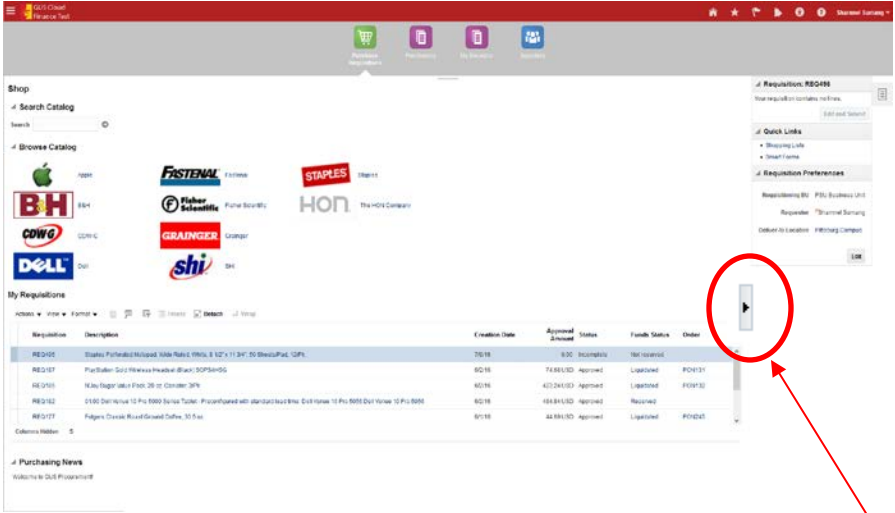
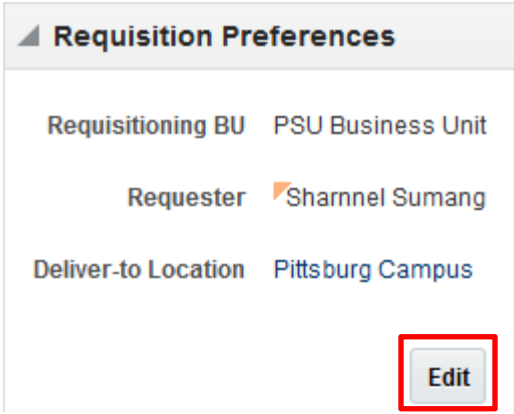


Step	Action
1.	<p>Begin by clicking on the Home icon at the top right of the screen to access the Gus Cloud Springboard.</p> 
2.	<p>Click on the Purchase Requisition icon. If this icon is not visible, click on the Procurement icon which will reveal your task icons within the Procurement module. Click the Purchase Requisitions icon.</p> <div style="display: flex; justify-content: space-around; align-items: center;"> <div style="text-align: center;">  <p>Purchase Requisitions</p> </div> <div style="text-align: center;">  <p>Procurement</p> </div> </div>

Job Aid

Shopper Punchouts


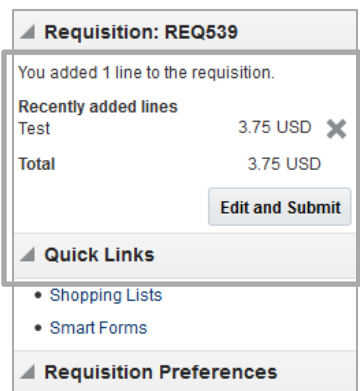


Step	Action
3.	<p>Purchase Requisition page:</p>  <p>This side toolbar view can be hidden or viewable with the use of the arrow key.</p>
4.	<p>The requisition preferences (favorites) located on the side toolbar is designed to help speed up the requisition process and minimize errors from entry by specifying default information for creating requisitions. Default Ship to address should always be Central Receiving- 300 E Lindburg.</p> 

Job Aid

Shopper Punchouts



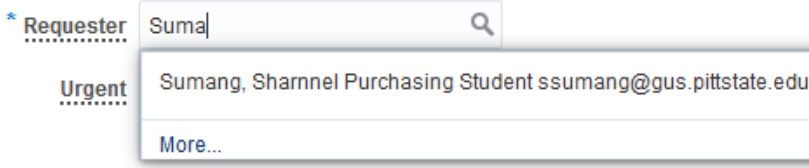
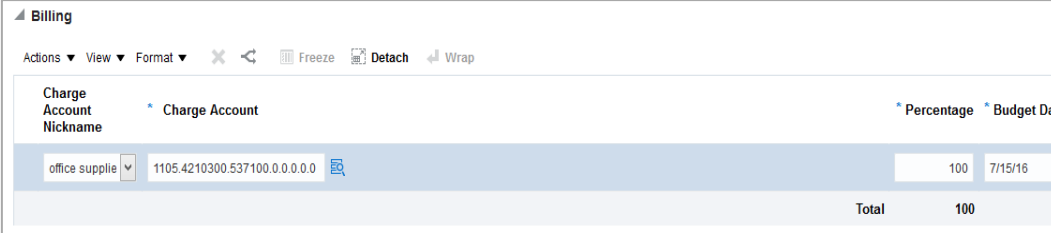


Step	Action
5.	<p>Punchout links are displayed with the Vendor’s logo.</p> <p>▲ Browse Catalog</p> 
6.	<p>Click on the logo link to be directed to that vendor’s website. Shop as would with any online purchase, and place your order following the prompts of the website.</p>
7.	<p>Once you have submitted your “Check Out” from the website, your shopping cart will be redirected back to the Purchasing Requisitions Document Builder in Gus Cloud. It allows you to see what you have in your “cart” as you shop.</p> 

Job Aid

Shopper Punchouts

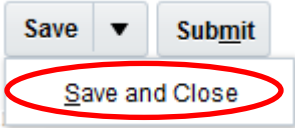
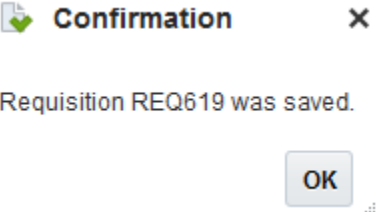

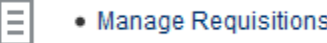


Step	Action
8.	<p>Click Edit and Submit on the document builder to open the full requisition and add your funding, description and other information.</p> 
9.	<p>Your Description needs to define the overall purpose of the purchase. Justification is an internal information field- such as “Here is John Doe’s new laptop cart” or “Use of XXXX funding was requested by Jane Doe in X Dept”</p> 
10.	<p>Change the requester name to the user you are shopping for.</p> 
11.	<p>Add your funding for each line in your requisition. Use the REASSIGNED CART charge account 9999.9.534900.0.0.0.0</p> 

Job Aid

Shopper Punchouts

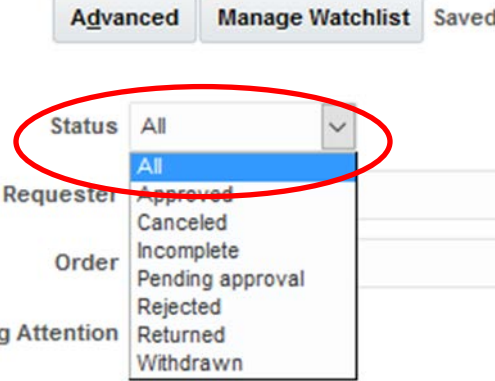
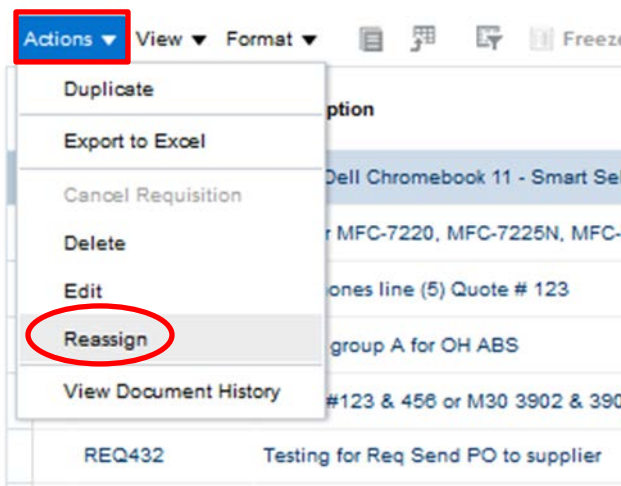


Step	Action																																										
12.	<p>Click Save and Close to save and close your requisition. This will return you to the purchase requisition home page.</p> 																																										
13.	<p>Confirmation page including Requisition Number is displayed. Note your requisition number.</p> 																																										
14.	<p>Click OK to close the confirmation box.</p> 																																										
15.	<p>On the requisition page, under My Requisitions, you will see your incomplete requisition.</p> <p>My Requisitions</p> <p>Actions View Format Freeze Detach Wrap</p> <table border="1"> <thead> <tr> <th>Requisition</th> <th>Description</th> <th>Creation Date</th> <th>Approval Amount</th> <th>Status</th> <th>Funds Status</th> <th>Order</th> </tr> </thead> <tbody> <tr> <td>REQ613</td> <td>Staples Perforated Notepad, ...</td> <td>9/2/16</td> <td>102.50 USD</td> <td>Incomplete</td> <td>Not reserved</td> <td></td> </tr> <tr> <td>REQ596</td> <td>SanDisk Cruzer Glide - USB fl...</td> <td>9/1/16</td> <td>9.00 USD</td> <td>Approved</td> <td>Liquidated</td> <td>PON282</td> </tr> <tr> <td>REQ571</td> <td>Little Receptacles pending res...</td> <td>9/1/16</td> <td>1.00 USD</td> <td>Approved</td> <td>Liquidated</td> <td>PON280</td> </tr> <tr> <td>REQ564</td> <td>Printing of PSU Fall 2016 Mag...</td> <td>8/31/16</td> <td>859.60 USD</td> <td>Approved</td> <td>Reserved</td> <td></td> </tr> <tr> <td></td> <td>https://psuapps.pittstate.edu/ui/psu/directory/... - 38 Gallon O...</td> <td>8/31/16</td> <td>526.85 USD</td> <td>Approved</td> <td>Reserved</td> <td></td> </tr> </tbody> </table>	Requisition	Description	Creation Date	Approval Amount	Status	Funds Status	Order	REQ613	Staples Perforated Notepad, ...	9/2/16	102.50 USD	Incomplete	Not reserved		REQ596	SanDisk Cruzer Glide - USB fl...	9/1/16	9.00 USD	Approved	Liquidated	PON282	REQ571	Little Receptacles pending res...	9/1/16	1.00 USD	Approved	Liquidated	PON280	REQ564	Printing of PSU Fall 2016 Mag...	8/31/16	859.60 USD	Approved	Reserved			https://psuapps.pittstate.edu/ui/psu/directory/... - 38 Gallon O...	8/31/16	526.85 USD	Approved	Reserved	
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16.	<p>Click on the Task Pane Icon located on the right of your document builder to get to your Manage Requisitions.</p> 																																										

Job Aid

Shopper Punchouts

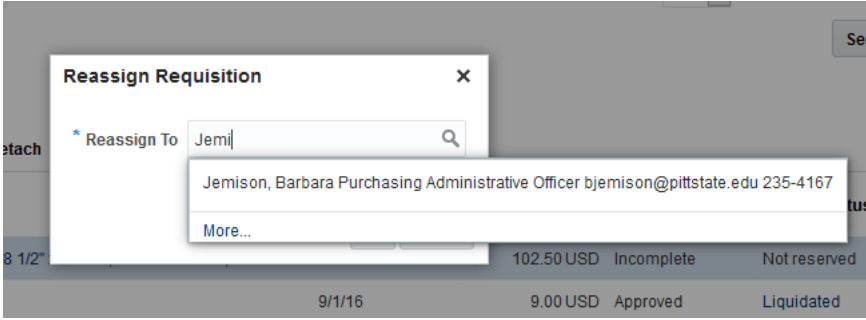
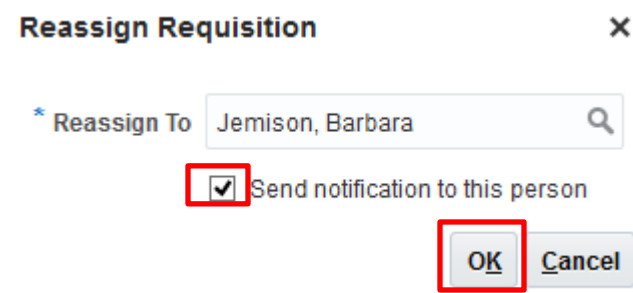



Step	Action
17.	<p>On the Manage Requisitions page, make sure to change the Status to “All”.</p>  <p>The screenshot shows a web interface with buttons for 'Advanced', 'Manage Watchlist', and 'Saved'. Below these is a 'Status' dropdown menu currently set to 'All'. The dropdown menu is open, showing options: 'All', 'Approved', 'Canceled', 'Incomplete', 'Pending approval', 'Rejected', 'Returned', and 'Withdrawn'. The 'All' option is highlighted in blue and circled in red.</p>
18.	<p>Highlight the line of Requisition by clicking on the far left side of it. Then, use your Action dropdown to select the Reassign function.</p>  <p>The screenshot shows a table of search results. At the top left of the table is an 'Actions' dropdown menu, which is circled in red. The dropdown menu is open, showing options: 'Duplicate', 'Export to Excel', 'Cancel Requisition', 'Delete', 'Edit', 'Reassign', and 'View Document History'. The 'Reassign' option is highlighted in gray and circled in red. The table rows contain requisition details such as 'Dell Chromebook 11 - Smart Se...', 'MFC-7220, MFC-7225N, MFC-', 'ones line (5) Quote # 123', 'group A for OH ABS', and '#123 & 456 or M30 3902 & 390'. The bottom row is 'REQ432 Testing for Req Send PO to supplier'.</p>

Job Aid

Shopper Punchouts



Step	Action
19.	<p>A Reassign Requisition pop-up window will appear. Reassign by users last name, first name.</p> 
20.	<p>Make sure to check box to indicate send notification to person. Click OK.</p> 
21.	<p>Back at your Home Shop Page, you should no longer see that Requisition listed under My Requisitions.</p> 
22.	<p>Congratulations! You have reached the end of this tutorial. End of Process.</p>