

# **Hilltop Shop User Reference Guide USF Shopper**



UNIVERSITY OF  
SAN FRANCISCO

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## Overview of the Session

### Agenda

1. Introduction
2. About this Session
3. Concepts & Process Overview
4. Hands-On Exercises
5. Training resources
6. Question and Answer
7. Survey

### About Our Learning Objectives

We have developed Learning Objectives to provide you with the necessary knowledge, skills, and attitudes to successfully use Hilltop Shop. Please refer to them as we proceed through training.

Listed below are the expectations once the learning objective is achieved.

<b>Skills</b>	What participants should be able to do at the end of the training course.
<b>Knowledge</b>	What participants should know and understand at the end of the training course.
<b>Attitudes</b>	What the participants' opinions will be about the subject matter at the end of the training course.

## Hilltop Shop Business Process

### Learning Objectives

During this session, you will learn:



- ✓ Benefits Hilltop Shop will bring to the Procure-to-Pay process
- ✓ New practices and procedures for requesting products and services
- ✓ Departmental roles and responsibilities in Hilltop Shop
- ✓ Key capabilities of each role
- ✓ High-level process overview

### Benefits of Hilltop Shop

#### Efficiencies

- Hilltop Shop is a cloud-based, Source-to Pay (S2P) solution that is defined as a suite of integrated applications designed to manage the procurement processes from vendor management, strategic sourcing, contract management, and spend analysis to operational procure-to-pay within a single solution.

- All University employees (“Shoppers”) can access Hilltop Shop online through myUSF.
- Vendors self-register and maintain their profiles to ensure all information is true and correct.
- One system to accomplish all procurement activities.
- One stop shop for catalog and non-catalog orders.
- Automatic requisition routing to obtain all necessary approvals including special permissions based on dollar thresholds, commodity, and/or expenditure types.

#### **Ease of Use**

- Catalog content available with USF preferred pricing.
- Catalog and non-catalog orders in the same system.
- After-the-fact payment to vendors.

#### **Visibility**

- Purchasing and payment information in one place.
- Complete history per transaction showing who, what and when a transaction was created/modified.
- Data export capability.

#### **Compliance**

- Ability for departments to increase compliance using workflow.
- Ability to ensure purchasing compliance with USF policy.
- Allows PaAS to perform fair and impartial sourcing events to satisfy the University’s Competitive Bidding Requirements.
- Every vendor is vetted to ensure adherence to University policies and procedures and complies with local, state and federal laws.
- Repository for procurement-related contracts and buying agreements.

#### **Speed**

- Orders are electronically sent to the supplier as soon as approval steps are complete.
- Orders dispatched to vendors in real-time.
- Quick order turn-around from catalog enabled vendors.

#### **Cost Savings**

- On contract spend.
- Increased spend visibility leads to better Vendor pricing.
- Allows the University to develop additional buying agreements and contracts by analyzing spend data and buying trends.

#### **Communication**

- Use of internal notes, comments, and attachments to others involved in processing the purchase.
- Use of external notes to communicate with Vendors.

### **New Practices and Procedures**

- All University expenditures, except for those noted as out of scope or emergency in nature, should be initiated through Hilltop Shop.
- Departments may establish more restrictive procedures than those outlined in the Procurement Policy.
- All University vendors that provide goods and services within the scope of the Procurement Policy will register through the Total Supplier Management (TSM) module of Hilltop Shop. TSM provides a central approval platform for new vendors and a secure repository for vendor records, including vendor contacts, information needed to

process payments, Certificates of Insurance, and any Minority-Owned Business certifications submitted by the vendor.

- Vendors will submit invoices directly to Accounts Payable.
- All University employees (“Shoppers”) can access Hilltop Shop through myUSF.
- Hilltop Shop allows departments to purchase goods or services from pre-negotiated contracts and buying agreements.
- Requestors can place Hosted Catalog and Punch-Out Store orders up to \$500 without additional approvals.
- If you cannot find the item or service required, users will submit a **Non-Catalog** or **Service Request** form.
- A Shopper, Requestor or Approver associated with the purchase order (PO) will be required to post receipts for all goods and services \$500 and over. Please note: The receipt is required to pay the Vendor.
- Receipts are not required for purchases less than \$500. If desired, users may post receipts on all transactions; however, the Vendor will be paid regardless if a receipt is posted or not. If a Vendor has not satisfactory fulfilled PO obligations, please refer to the Quick Reference Guide titled Managing Invoice Exceptions.
- Receipt of goods or services will serve as a confirmation that the vendor has fulfilled their obligation and all associated invoices are “Ok to pay.”

## Departmental Roles in Hilltop Shop

### Roles & Capabilities

All users in Hilltop Shop have an assigned role. Each role has assigned permissions allowing a user to perform specific functions in Hilltop Shop. The table below provides a high-level summary of the basic functions each role can perform in Hilltop Shop.

Role	Capabilities/Functions											
	Create Cart	Assign Cart	Submit Cart	Appv/Reject/Return Req	Edit Req in WF	Edit PO	Create Receipt	Create Invoice	Resolve Match Exception	Appv/Reject/Comment Invoice	Request New Vendor	Appv Vendor Request
Shopper	✓	✓					✓					
Requestor	✓	✓	✓				✓				✓	
Approver	✓	✓	✓	✓	✓		✓				✓	
Invoice Approver	✓	✓							✓	✓		
Specialty Approver	✓	✓		✓	✓		✓					
PaAs Ops	✓	✓	✓	✓	✓	✓	✓				✓	✓
AP Ops	✓	✓						✓	✓	✓	✓	

### Details

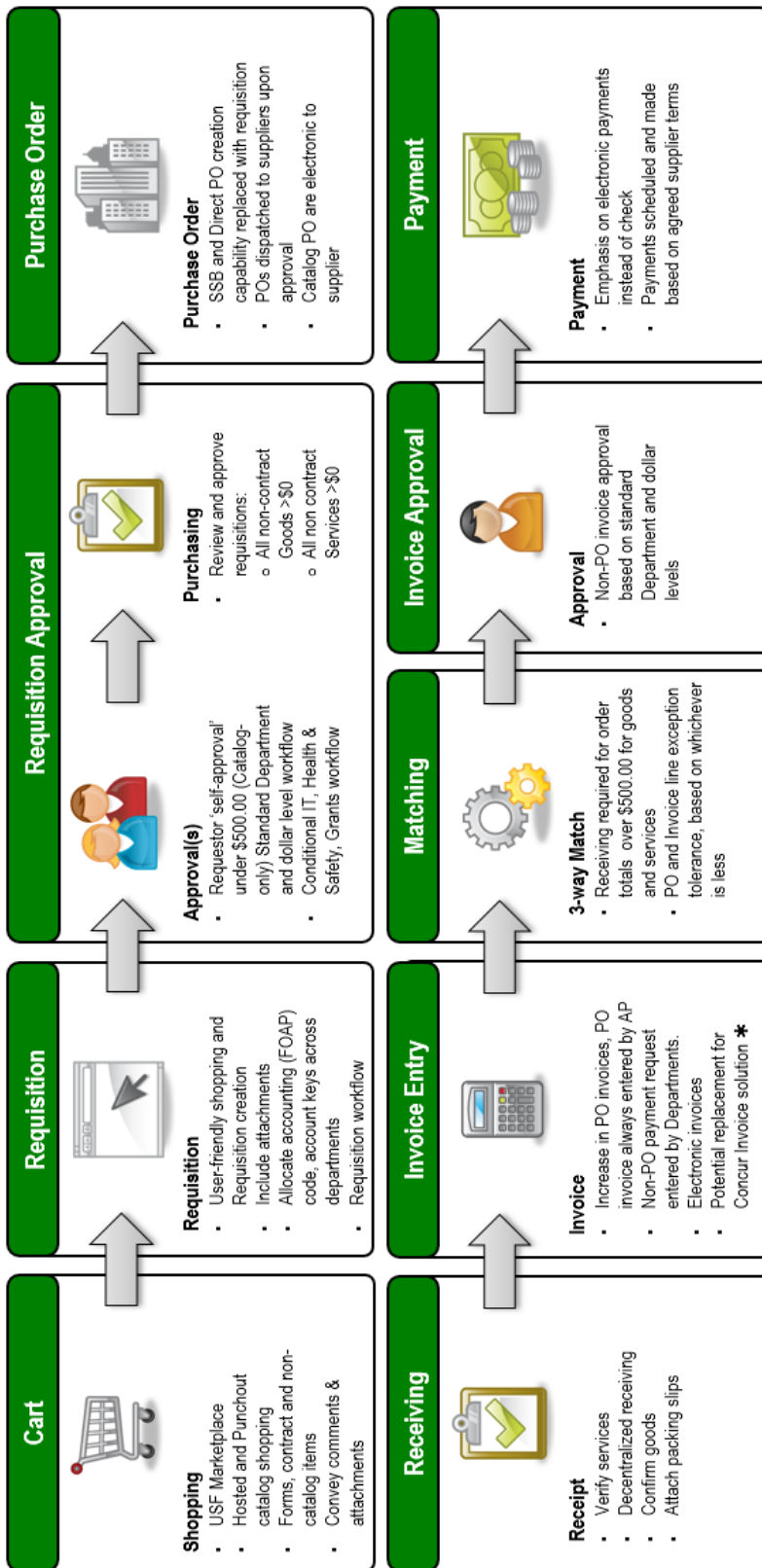
Role	Description
Shopper	<ul style="list-style-type: none"> <li>Shop/create carts in Hilltop Shop</li> <li>Assign Carts to Requestor. (Shopper must know to whom to assign the cart)</li> <li>On PO greater than \$500, confirms Vendor has fulfilled the order by posting the receipt</li> </ul>

	<ul style="list-style-type: none"> <li>Optional: Can convey comments and funding instructions</li> </ul>
<b>Requestor</b>	<ul style="list-style-type: none"> <li>Role assigned by Budget Manager - <b>Please Note:</b> Banner Finance access is a prerequisite for the Requestor role. Based on assigned Banner FUND/ORG codes, Requestors can view ePrint reports and access Banner Self-Service</li> <li>Can shop for department up to \$500 from a Hosted Catalog or Punch-Out Store without additional department approvals.</li> <li>Receives assigned/submitted carts from Shoppers</li> <li>Can return the cart to the Shopper or edit the Cart before submitting into requisition workflow</li> <li>Must have knowledge of proper chart field use and responsible for proper FOAP assignment</li> <li>Confirms all requisition information is accurate, complete and complies with policy and funding requirements</li> <li>On PO greater than \$500, confirms Vendor has fulfilled the order by posting the receipt</li> </ul>
<b>Approver</b>	<ul style="list-style-type: none"> <li>Role assigned based on Banner approval queues - <b>Please Note:</b> Banner Finance access is a prerequisite for the Approval role. Based on assigned Banner FUND/ORG codes, Approvers can view ePrint report and access Banner Self Service.</li> <li>Can shop and submit requisitions without assigning carts to Requestor</li> <li>Review requisitions for compliance and budget availability on unrestricted funds</li> <li>Confirms requisition information is accurate, complete and complies with the policy and funding requirements</li> <li>Ability to edit Requisition within workflow</li> <li>Ability to approve, return, or reject requisition.</li> <li>On PO greater than \$500, posts receipts to authorize payment to vendor</li> </ul>
<b>Invoice Approver</b>	<ul style="list-style-type: none"> <li>This role is typically the Budget Manager/Director within the Business Unit.</li> <li>Works with Shoppers and/or Requestors to resolve all match exceptions</li> <li>When appropriate, works with non-catalog vendors to correct erroneous invoices</li> </ul>
<b>Specialty Approver</b>	<ul style="list-style-type: none"> <li>Role assigned based on Hilltop Shop workflow rules (not Banner)</li> <li>Reviews and confirms requisitions for compliance</li> <li>Ability to edit Requisition within workflow</li> <li>Ability to approve, return, or reject requisition</li> </ul>

	<ul style="list-style-type: none"><li>• Assigned based on Jaggaer workflow rules (not Banner)</li><li>• Role can shop, however Specialty Approvers must assign carts to a Requestor for review</li></ul>
<b>Purchasing Ops</b>	<ul style="list-style-type: none"><li>• Submit requisitions that are cross charged across multiple department FOAPs</li><li>• Confirms requisitions comply with USF Procurement Policy</li><li>• Approve, return, reject and edit requisitions within workflow</li><li>• Completes change orders and cancellations requests</li><li>• Create and manages formal Sourcing Events</li><li>• Create and manages procurement related contracts and buying agreements</li><li>• Views Vendor profiles</li><li>• Vets and approves Vendor registrations</li></ul>
<b>Accounts Payable Ops</b>	<ul style="list-style-type: none"><li>• Enter, review and approve vouchers/credit memos</li><li>• Sets up prepaids and recurring payment schedules</li><li>• Review and approve match exceptions scenarios for tax exceptions and 1099 reporting</li><li>• Reject/Cancel Invalid Vouchers</li><li>• Review and approve all after-the-fact payment requests</li></ul>



## High-Level Business Process



The High-Level Business process shows each of the major steps that are performed in the end-to-end process from shopping through review, authorization, approval, ordering, receiving, invoice processing, exception management and payment

## About the Shopper Role

### Overview

Initially, all USF faculty and staff are assigned to the Shopper role. The Shopper accesses Hilltop Shop through MyUSF. Student workers and University-sponsored student organizations may also access Hilltop Shop with proper authorization. Shoppers will convey what they need to purchase by creating a cart. When the cart is complete, the Shopper assigns the cart to the Requestor to review and provide FOAP information to process the cart.

Shoppers can add items to a cart through one of the following mechanisms:

- Vendor Punch-Out Stores
- Vendor Hosted Catalogs
- Forms (services, non-catalog requests, after-the-fact payments, and a variety of other niche requests)



Shoppers that know what they need to purchase can simply search and add the items to their cart. If the item or service you need does not come up in the search results, the Shopper completes a Hilltop Shop form to convey ordering information.

### Shopper Responsibilities

#### Shopping

- Utilize Hilltop Shop as the only method for requesting purchases on behalf of USF. Please refer to USF Procurement Policy
- Only shop from USF approved vendors
- Shop from Punch-Out Stores and Hosted Catalogs before requesting a non-catalog purchase

#### Shopping Cart Quality

- Ensure line item descriptions are specific and detailed to describe the item or service (i.e., Do not enter “Business Cards”; rather enter “1 box of 250 each Business Cards for Jane Doe”)
- Add comments, notes, and attachments when necessary to clarify purchasing needs
- As a best practice, keep items that require a Specialty Approval or Form in a separate cart from other items
- Create separate shopping carts for each type of form (i.e., Do not mix multiple forms into one shopping cart)

#### Necessary Documentation

- **Quotes/Bids:** Ensure the shopping cart complies with University Competitive Bidding Requirements by attaching required documentation to the cart. University competitive bidding requirements are as followed:
  - Up to \$5,000 - Pricing should be reasonable, but there is no requirement to solicit a quote or proposal
  - \$5,000 to \$25,000 - Obtain a quote or proposal from at least 2 qualified sources
  - \$25,000 to \$50,000 - Obtain a quote or proposal from at least 3 qualified sources
  - Above \$50,000 - Formal sourcing event (RFx) is required. Please contact Purchasing and Ancillary Services
- **Sole Source Justification:** Demonstrate the purchase from a particular vendor is sufficiently justified as sole or single source when quotations or competitive bids are not acquired
  - Shoppers should complete the Sole/Single Source Justification section on the following forms:
    - Non-Catalog Requisition

- Service Order Requisition
- After-the-Fact Payment
- Independent Contractor
- **Pre-Payments:** Though pre-payments are not typically acceptable, in rare instances some vendors may require a deposit before fulfilling a Purchase Order. In these instances, the Shopper is responsible for providing the following documentation and comments:
  - Ensure the “Prepayment Required” checkbox in the General section on the Requisition is checked (Note: the pre-payment will not be processed if this checkbox is not properly set on the requisition)
  - Attach a pro-forma invoice provided by the vendor detailing the quantity, unit price, item description, shipping and applicable payment schedule
  - Explanation of why a pre-payment is necessary for the purchase

## Requisition Approval Workflow (University Approval Requirements):

Hilltop Shop utilizes automated workflow to route purchase requisitions through departmental workflow based on the assigned FOAP and the total amount of the requisition. The table below outlines the type of departmental approvals that are required per dollar threshold.

Approval Required	Expenditure Type and Dollar Threshold
Requestor Specialty Approval (if required)	Hosted Catalog & Punch-Out Store purchases up to \$500  <b>Note:</b> Business Managers will certify these purchases on a monthly basis
Business Manager Specialty Approval (if required)	Hosted Catalog & Punch-Out Store purchases \$500-\$5,000.
Business Manager Specialty Approval (if required)	Non-catalog purchases up to \$5,000
Business Manager Specialty Approval (if required) <b>Plus:</b> <b>For Non-Provost Units:</b> Assistant or Associate Vice President, Athletic Director <b>For Provost Units:</b> Dean and Associate Vice Provost	All purchases greater than \$5,000  <b>Note: Non-Provost Units:</b> With the approval of the respective divisional Vice President and the Vice President for Business and Finance, threshold values can increase up to \$50,000,
Business Manager Specialty Approval (if required) <b>Plus:</b> <b>For Non-Provost Units:</b> Respective Divisional Vice President <b>For Provost Units:</b> Vice Provost for Planning and Budget	All purchases greater than \$10,000

## Specialty Approval

In addition to departmental approvals, Specialty Approvals are required on requisitions that meet certain conditions regardless of the value.

Approval Required	Scenario
<b>Grants Approval</b>	Purchases made against a Grants fund (funds beginning with a "4")
<b>ITS</b>	Purchases made for information technology, including systems, hardware or software purchases
<b>Environmental Health &amp; Safety</b>	Purchases of hazardous materials or chemicals
<b>Furniture</b>	Purchases for furniture, fixtures or equipment (FF&E)
<b>Appliances</b>	Purchases for appliances (i.e., refrigerator, microwave, heater, A/C, etc.)
<b>Branding, Marketing or Advertising</b>	Purchases for marketing collateral, advertising or branding (logo).
<b>Office of the General Counsel (OGC)</b>	Any procurement related contract or agreement (SLA, MSA, etc.)
<b>Sourcing</b>	Purchases > \$50,000 requires Formal Sourcing Events (RFx)
<b>Procurement</b>	Non-Catalog Orders New Orders: Name Badges and Business Cards Purchases > \$5,000 Procurement related contracts or buying agreements Purchases with blank commodity codes Change Order and Cancellation requests
<b>Accounts Payable</b>	After-the-Fact Payment form

## Hilltop Shop Exercises

### Profile Management

Profiles in Hilltop Shop allow you to make the buying and paying process more efficient by allowing you to save default information such as the shipping address, campus delivery location, cart assignees, notification preferences and email approval options.

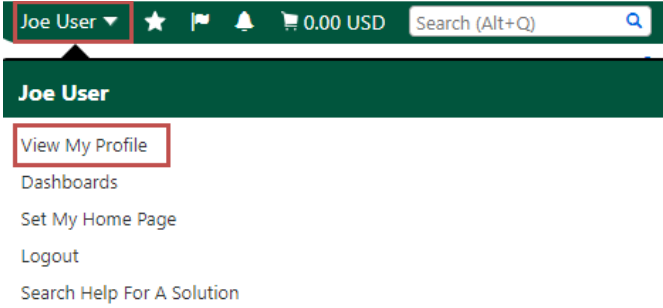


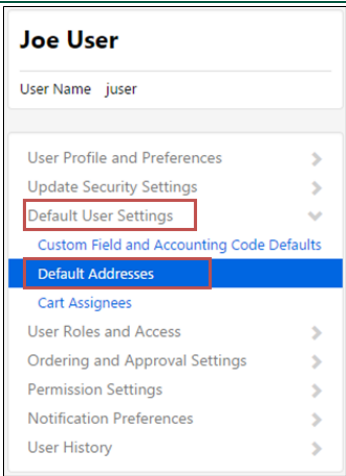
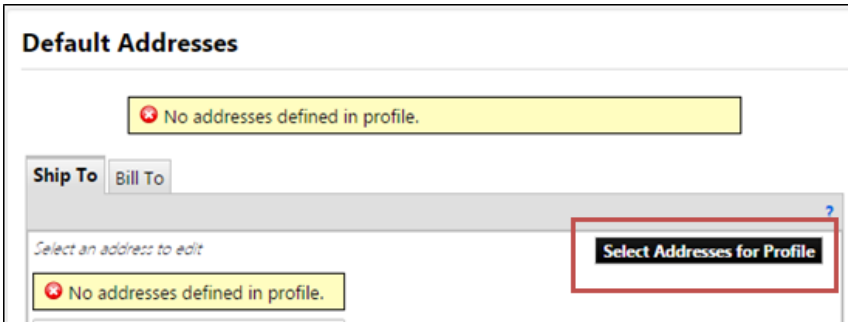
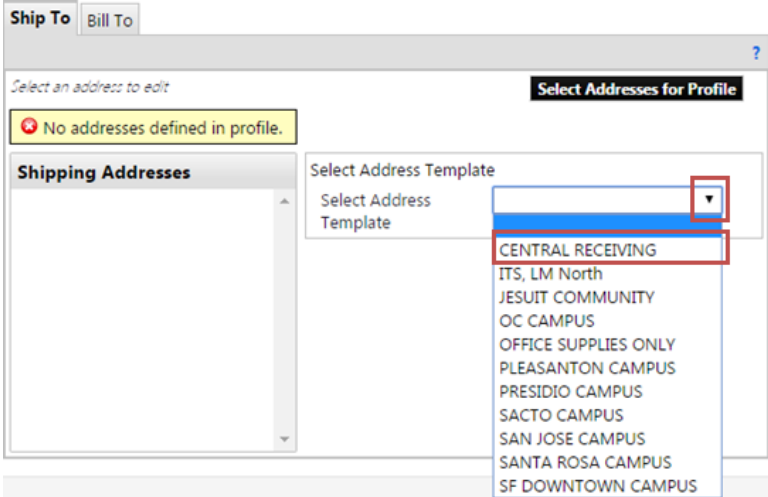
Note: User roles, permissions, order settings as well as approval settings are maintained by System Administrators and cannot be changed without authorization. Please consult with your Budget Manager to update your system controlled settings.

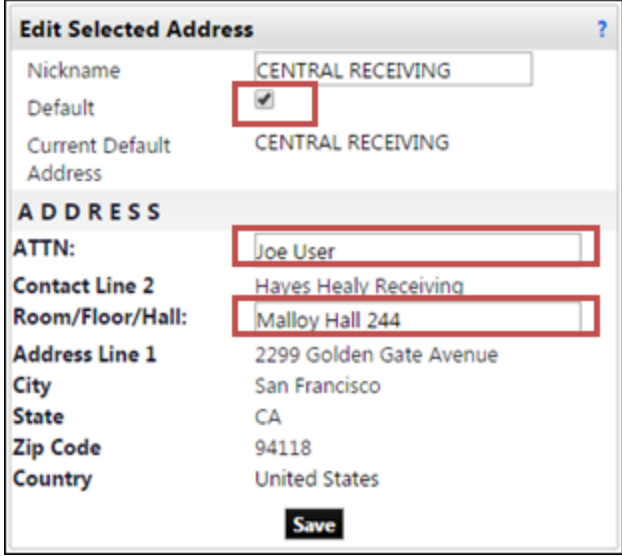
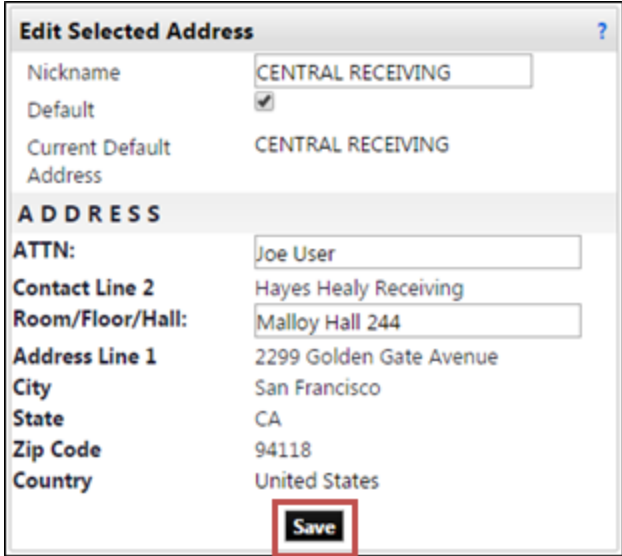

In this section of the course, you learn to perform the following:

- Exercise 1: Setting Default Shipping Address
- Exercise 2: Setting Favorite Pages

### Exercise 1: Setting Default Shipping Address

Step	Description
1	Login to Hilltop Shop using the username and password provided to you for training. In production, Hilltop Shop is accessed through myUSF using your username and password.
2	<p>From the home page, click your name in the dashboard located on the top right of the page and select <b>View My Profile</b> from the menu</p> 
3	Click <b>Default User Settings</b> and then <b>Default Addresses</b>

		
4	<p>Click on the <b>Select Addresses for Profile</b> button</p>  <div data-bbox="1170 764 1308 894"> <p><b>Helpful Tips</b></p> </div> <p>The Bill-To address defaults to the USF-Accounts Payable address. Users may not modify the Bill-To address</p>	
5	<p>Search using the drop down list of approved USF address locations. Once you have identified your preferred delivery address, click on the corresponding address name.</p> 	
6	<p>Click <b>Default</b> in the <b>Edit Selected Address</b> box. Enter your name in the <b>ATTN:</b> field and your campus delivery location in the <b>Room/Floor/Hall</b> field.</p>	

		
7	<p>Click the <b>Save</b> button to store the information in your profile.</p> 	 <p><b>Helpful Tips</b></p> <p>A Requestor or Approver can modify your cart delivery instructions per order. Any cart changes by a Requestor or Approver will not change your default settings.</p>

## Exercise 2: Setting Favorite Pages

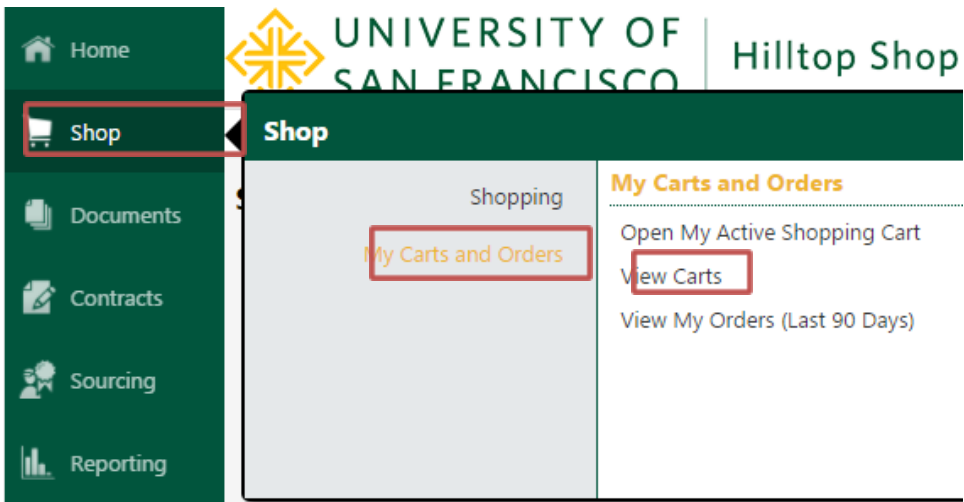
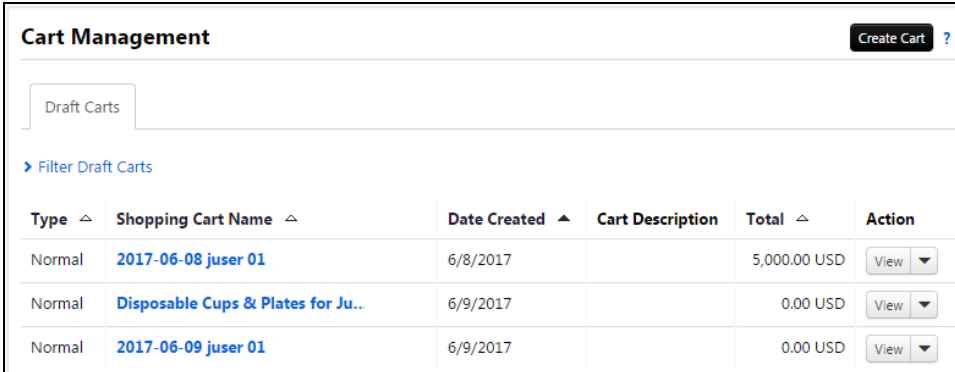

Hilltop Shops allows users to bookmark any page as a Favorite Page. You can quickly access frequently used pages by clicking a bookmarked link instead of scrolling through the navigation bar.

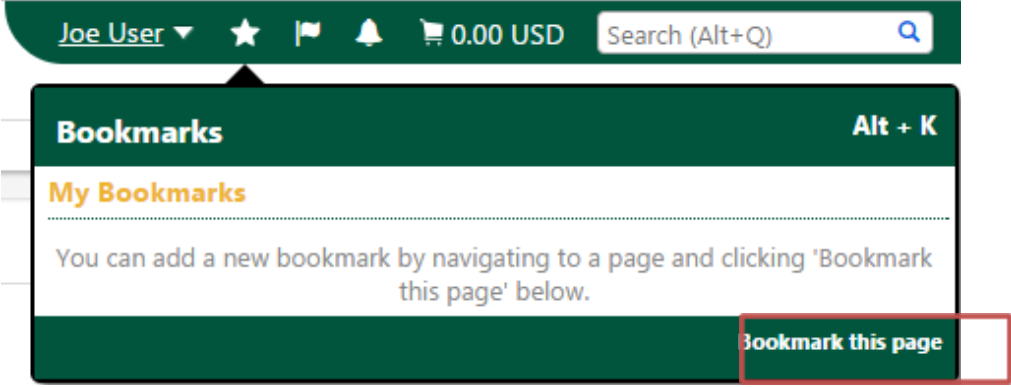

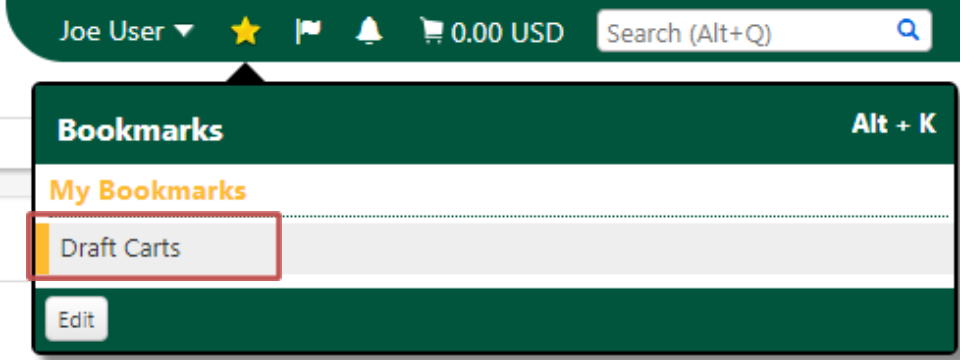


One page that may be helpful for Shoppers to bookmark is the screen that lists all of a Shopper's draft shopping carts. Please follow the steps below to save your frequently used pages.

Step	Description
------	-------------



1	Login to Hilltop Shop using the username and password provided to you for training. In production, Hilltop Shop is accessed through myUSF using your username and password.
2	<p>From the home page, click on <b>Shop</b> from the left side navigation bar. Alternatively, you may use the <b>Alt + P</b> shortcut to open the Shop Dialog Box. Click on <b>My Carts and Orders</b>. Click on <b>View Carts</b></p> 
3	<p>The screen will refresh and your draft shopping carts will display.</p>  <div data-bbox="1263 1003 1393 1129" style="background-color: yellow; border: 1px solid black; padding: 5px; display: inline-block;"> <b>Helpful Tips</b> </div> <p>In the <b>Action</b> field, the pull down menu will allow you to <b>View, Activate or Delete</b> your cart.</p>
4	<p>At the top of the screen, click on the <b>star icon</b> next you to your name</p> 
5	<p>Your <b>Bookmarks</b> list will expand. Alternatively, you may use the <b>Alt + K</b> shortcut to open the My Bookmarks Dialog Box. Click on the link to the lower right titled <b>Bookmark this page</b></p>

	
6	<p>The page is now saved in your <b>Bookmarks</b>.</p> <p> Notice the star icon color is now yellow indicating you have a saved bookmark. You can bookmark as many pages as you wish.</p> 

## Shopping and Forms

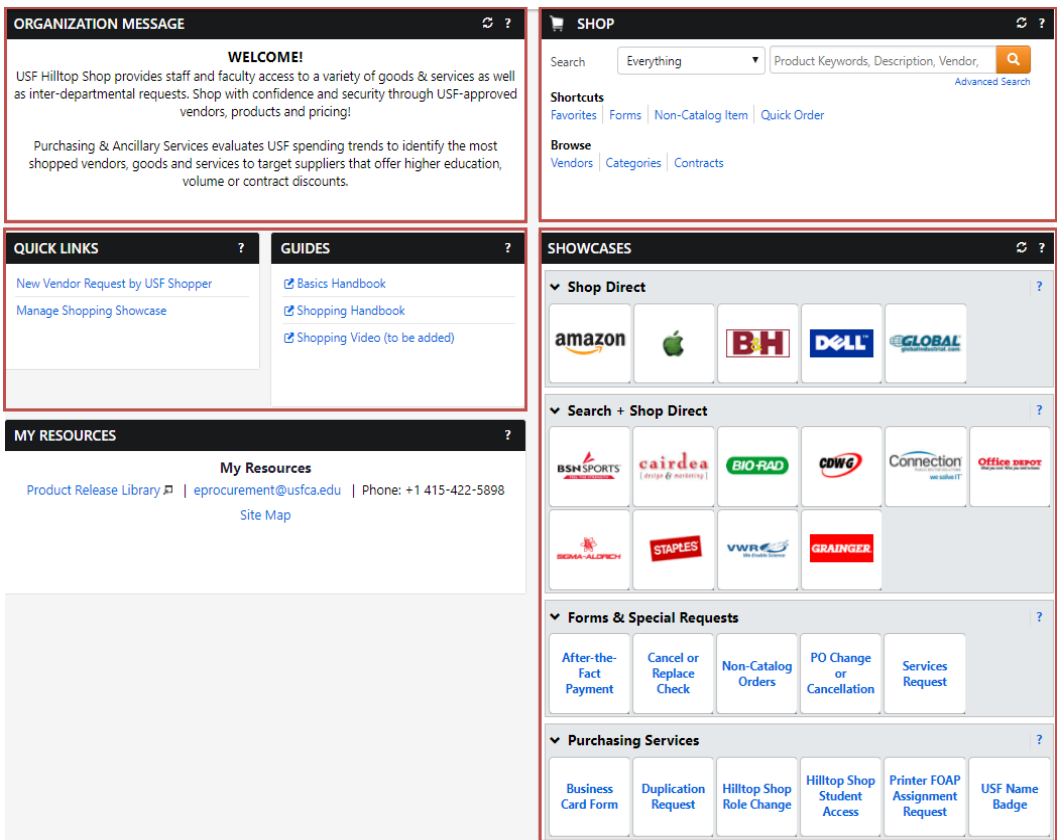
As a Shopper, you will have the ability to shop within Hilltop Shop utilizing the Hosted and Punch-out catalogs. Products and services not available from a Hosted Catalog or Punch-out Store utilize a form to submit the cart. Forms also allow Shoppers and Requestors to make other requests such as requesting a change to a purchase order already distributed to a vendor and to request payment of a vendor invoice that does not have a PO associated with it.

In this set of exercises, you will learn how to shop and submit carts utilizing the available methods in Hilltop Shop including Hosted Catalogs, Punch-out Catalogs, and forms.




In this section of the course, you learn to perform the following:






















- Exercise 3: Basic Navigation
- Exercise 4: Shopping Punch-out Catalog
- Exercise 5: Shopping Hosted Catalog
- Exercise 6: Shopping Non-Catalog Form
- Exercise 7: Shopping Using Services Form
- Exercise 8: After-the-Fact Payment Form

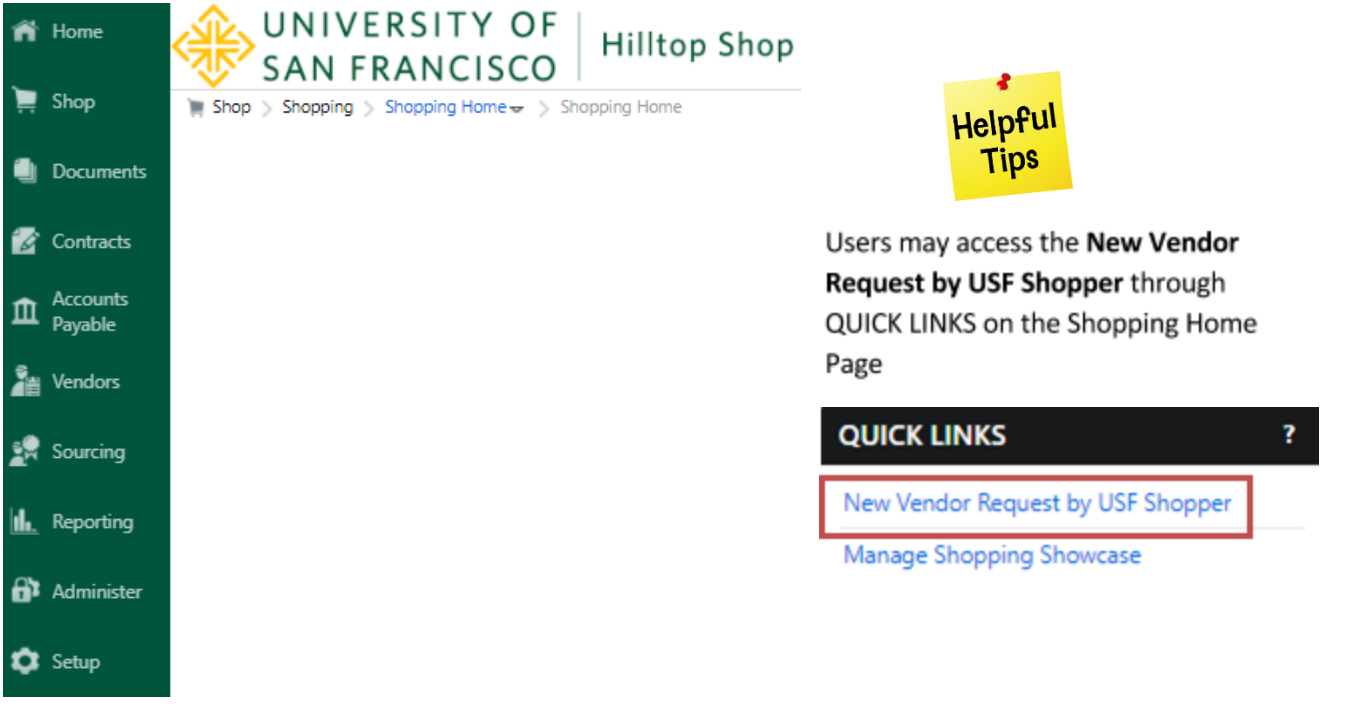
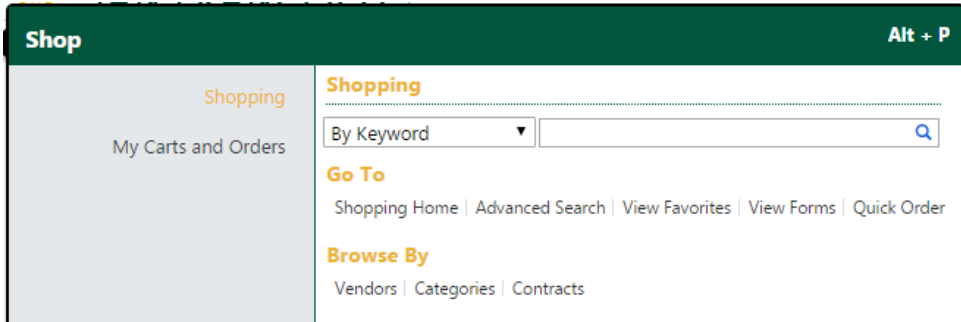
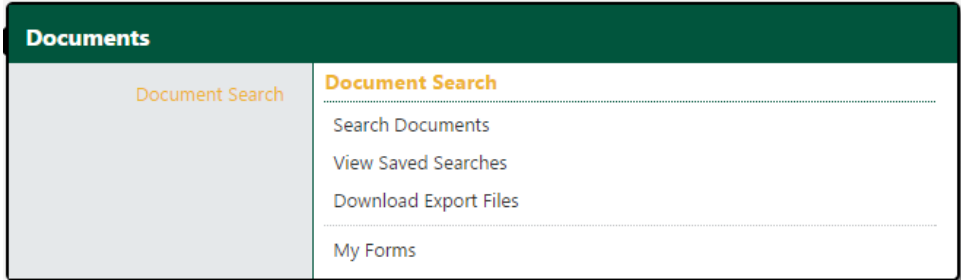
## Exercise 3: Basic Navigation


Step	Description
1	Login to Hilltop Shop using the username and password provided to you for training. In production, Hilltop Shop is accessed through myUSF using your username and password.
2	<p>The shopping homepage is composed of 4 major sections including: <b>Organization Message - “Shop at the Top” Search Bar - Quick Links - Shopping Showcases</b></p> 

Step	Description
3	<p>The <b>Organization Message</b> will contain announcements from Purchasing and Ancillary Services (PaAs), such as:</p> <ul style="list-style-type: none"> <li>▪ New functionality and updates</li> <li>▪ New Hosted Catalogs, Punch-Out Stores, and Forms</li> <li>▪ USF Procurement Policy Updates</li> <li>▪ Planned site outages</li> </ul>

	<div> <div>ORGANIZATION MESSAGE  ?</div> <div> <p><b>WELCOME!</b></p> <p>USF Hilltop Shop provides staff and faculty access to a variety of goods &amp; services as well as inter-departmental requests. Shop with confidence and security through USF-approved vendors, products and pricing!</p> <p>Purchasing &amp; Ancillary Services evaluates USF spending trends to identify the most shopped vendors, goods and services to target suppliers that offer higher education, volume or contract discounts.</p> </div> </div>
4	<p><b>Shop</b> “at the top” allows users to search for products from vendors who are hosting their products directly in Hilltop Shop.</p> <div> <div>SHOP  ?</div> <div> <div>Search</div> <div> <div>Everything ▼</div> <div>Product Keywords, Description, Vendor, </div> <div>Advanced Search</div> </div> </div> <div> <p><b>Shortcuts</b></p> <p><a href="#">Favorites</a>   <a href="#">Forms</a>   <a href="#">Non-Catalog Item</a>   <a href="#">Quick Order</a></p> <p><b>Browse</b></p> <p><a href="#">Vendors</a>   <a href="#">Categories</a>   <a href="#">Contracts</a></p> </div> </div>
5	<p>The <b>Quick Links</b> contain shortcuts to commonly used pages as well as links to other sites</p> <div> <div>QUICK LINKS ?</div> <div> <p><a href="#">New Vendor Request by USF Shopper</a></p> <hr/> <p><a href="#">Manage Shopping Showcase</a></p> </div> </div>
6	<p>The <b>Showcases</b> contain direct links to all Vendor <b>Hosted Catalogs</b> and <b>Punch-out Stores</b>.</p> <p>The vendors listed under the <b>Shop Direct</b> section have opted not to post their products and prices directly in Hilltop Shop. Users must go directly to the Vendor’s Punch-Out Store site to search for products.</p> <p>The vendors listed under the <b>Search + Shop Direct</b> section have opted to post their products directly in Hilltop Shop. This allows users to shop utilizing the <b>Shop at the Top</b> search bar. These vendors also offer a Punch-Out Store site as well. Click on the store logo to access the Punch-Out Store site.</p> <p>Additionally, the <b>Showcases</b> contain links to <b>Forms</b> users will need, such as a Non-Catalog Order, After-the-Fact Payment, etc.</p>

	<div data-bbox="196 260 1206 1430"> <div>SHOWCASES  </div> <div> <div>Shop Direct </div> <div>      </div> </div> <div> <div>Search + Shop Direct </div> <div>       </div> <div>     </div> </div> <div> <div>Forms &amp; Special Requests </div> <div> <div>After-the-Fact Payment</div> <div>Cancel or Replace Check</div> <div>Non-Catalog Orders</div> <div>PO Change or Cancellation</div> <div>Services Request</div> </div> </div> <div> <div>Purchasing Services </div> <div> <div>Business Card Form</div> <div>Duplication Request</div> <div>Hilltop Shop Role Change</div> <div>Hilltop Shop Student Access</div> <div>Printer FOAP Assignment Request</div> <div>USF Name Badge</div> </div> </div> </div>
7	<p>In addition to the shopping page, the <b>left</b> navigation bar contains links to all other functions a user may perform, including document search, receipt creation, view invoices, and new vendor request by USF Shopper</p>

	
8	<p><b>Shop</b> provides many of the same shopping links as found on the homepage in addition to links to navigate users to a listing of their active, assigned, and historical shopping carts.</p>  <p><b>Alt + P</b> is the shortcut to open the Shop Dialog Box</p>
9	<p><b>Documents</b> allow users the ability to search for requisitions, POs, and invoices they have permission to access. Additionally, this menu item will allow users to navigate to their approval queue.</p> 

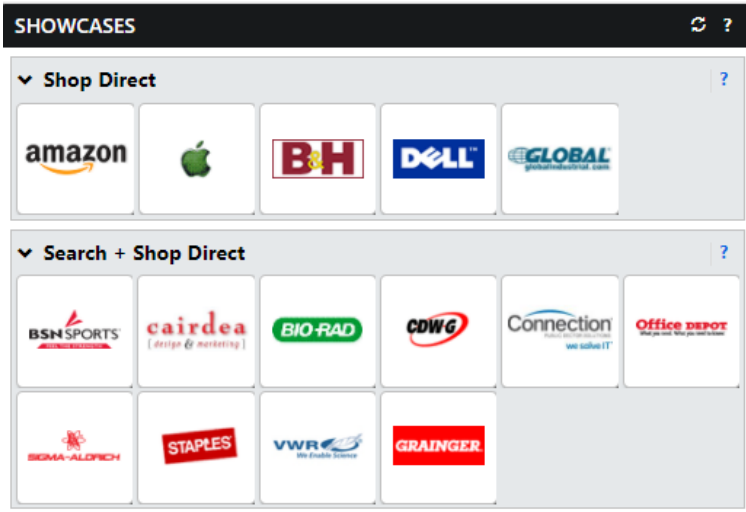

	<div>  <p>You <b>cannot</b> search for your draft carts under <b>Documents</b>. You may review your carts by following path:  <b>SHOP</b> → <b>My Carts and Orders</b> → <b>View Carts</b>  Alternatively, you may use the <b>Alt + P</b> shortcut to open the Shop Dialog Box.</p> </div>										
10	<p><b>Contracts</b> allows users to search for Purchasing Contracts you have access to view as well as place a request for a new purchasing contract with a vendor</p> <div> <table> <tr> <th colspan="2">Contracts</th></tr> <tr> <td>Contracts</td><td><b>Contracts</b></td></tr> <tr> <td>Reports</td><td>Search Contracts</td></tr> <tr> <td>Requests</td><td>View Saved Searches</td></tr> <tr> <td></td><td>View Import/Export Results</td></tr> </table> </div>	Contracts		Contracts	<b>Contracts</b>	Reports	Search Contracts	Requests	View Saved Searches		View Import/Export Results
Contracts											
Contracts	<b>Contracts</b>										
Reports	Search Contracts										
Requests	View Saved Searches										
	View Import/Export Results										
11	<p><b>Sourcing</b> gives end users the ability to view all Procurement Sourcing Events when a user is identified as a stakeholder</p> <div> <table> <tr> <th colspan="2">Sourcing</th></tr> <tr> <td>Sourcing Events</td><td><b>Sourcing Events</b></td></tr> <tr> <td>Reports</td><td>Sourcing Events Home</td></tr> <tr> <td></td><td>Search Events</td></tr> <tr> <td></td><td>View Exports</td></tr> </table> </div>	Sourcing		Sourcing Events	<b>Sourcing Events</b>	Reports	Sourcing Events Home		Search Events		View Exports
Sourcing											
Sourcing Events	<b>Sourcing Events</b>										
Reports	Sourcing Events Home										
	Search Events										
	View Exports										

## Exercise 4: Shopping from a Punch-out Store

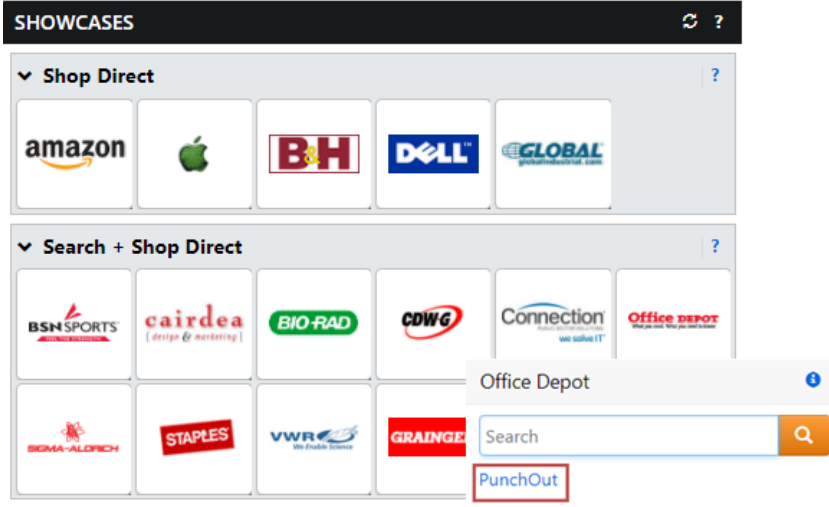
Punch-out store catalogs are integrated external links to a supplier's web-based catalog. The user exits the application to search and select products from a supplier's web catalog, then returns the items to the Hilltop Shop shopping cart. The selected items are then submitted through the standard requisition/order process.

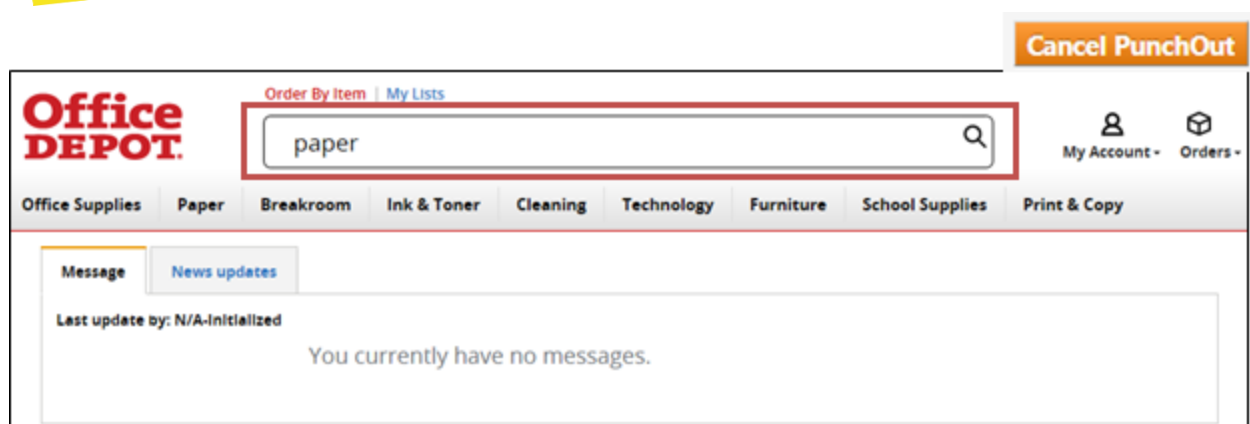
Purchasing and Ancillary Services (PaAs) has setup strategic relationships with a number of vendors frequently used by the campus community. These vendors have the ability to maintain a Punch-Out Store. Punch-out Stores provide the USF campus community with the following advantages:

- Similar shopping experience as consumer web sites
- Contain products and pricing negotiated at USF discount rates
- Selected products and UNSPSC Commodity Codes will automatically fill-out the Hilltop Shop cart without manual keying of product details

Step	Description
1	Login to Hilltop Shop using the username and password provided to you for training. In production, Hilltop Shop is accessed through myUSF using your username and password.
2	<p>From the homepage, navigate to the <b>Showcases</b> located in the lower right of the dashboard. Under <b>Showcases</b> lists the Vendors that are available.</p> <div>  <div>  <p>Always review the Vendor Showcase Section. Additional Vendor Hosted Catalogs and Punch-Out Stores are coming soon!</p> </div> </div>
3	Select a Vendor. Click the <b>PunchOut</b> link to be taken to the supplier's website




	
4	<p>From within the Vendor’s website, you can browse or search for items from the Punch-Out Store. In this example, we use the search feature to shop for “paper”</p>



To return to Hilltop Shop from the Punch-Out Store **without** adding items to your cart, click **Cancel Punchout** located in the upper left of the screen.

- 5 Locate the desired item, enter the **Quantity** and Click **Add to Cart**

**Hammermill® Fore Multipurpose Paper, Letter Size Paper, 24 Lb, White, Ream 500 Sheets**  
Description | Print  
Item # 254268 Entered Item # 254268



**\$12.19 / ream**

**FREE DELIVERY**  
Estimated delivery 1-3 business days  
Availability: 99,990

Qty  **Add to Cart**

**Buy Now**



Each Vendor's  
Punch-Out Store will  
navigate differently

6 Click **Add to Cart** in the middle or right-hand corner of the screen

Technology Furniture School Supplies Print & Copy

**Letter Size Paper, 24 Lb, White, Ream Of**

**\$12.19 / ream**

**FREE DELIVERY**  
Estimated delivery 1-3 business days  
Availability: 99,990

Qty  **Add to Cart**

**Buy Now**

**MY OFFICE DEPOT**

Hi, Punchout User  
Logout  
Account 01745681

New User Guide  
Watch Demo

Cart

Quick Order

6 or 9-digit number  Qty

Comments


+ Need to add more products?

**Add To Cart**

Helpful Links

We're here to help

7 Review shopping cart items and click **Check Out**

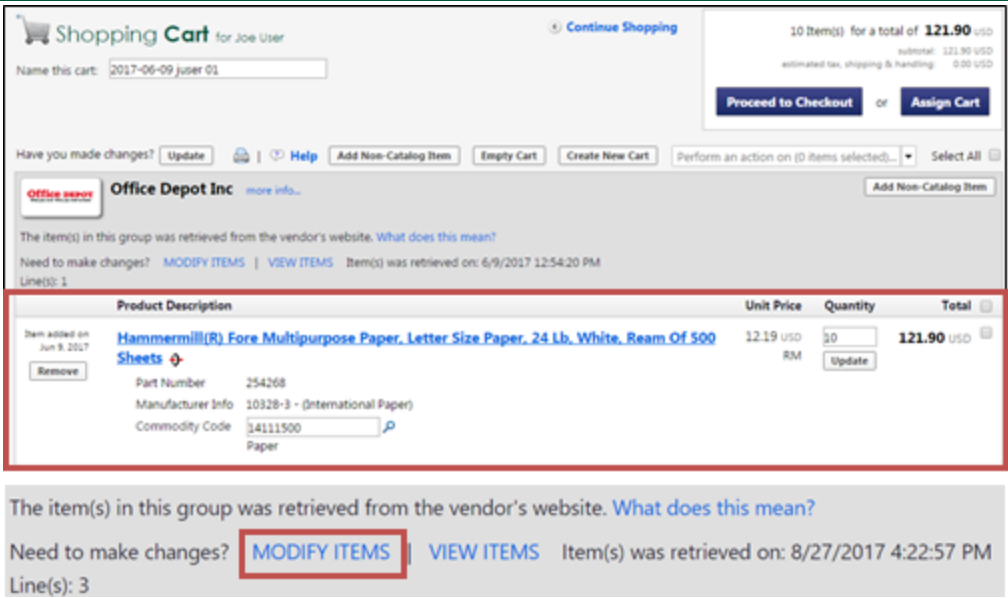
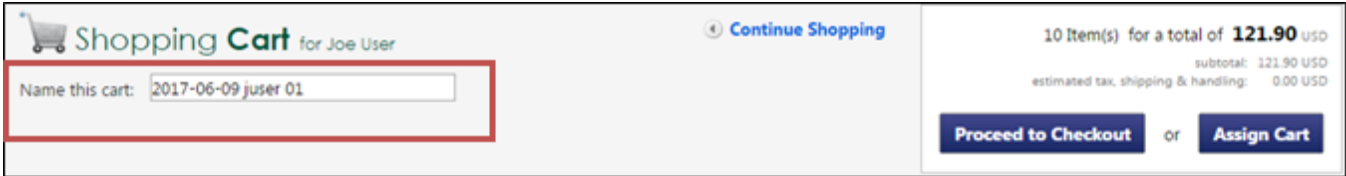
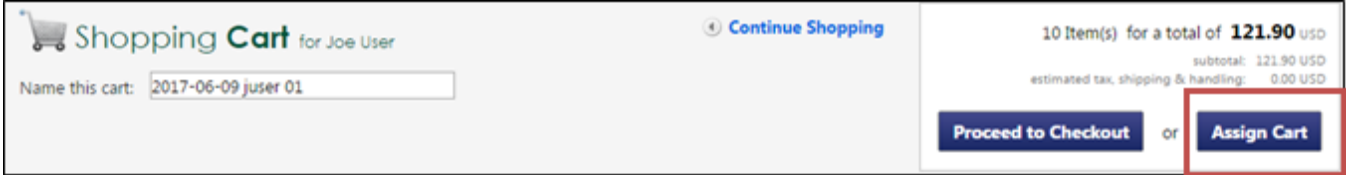
Description	Your Price/unit	Qty.
 <b>Hammermill® Fore Multipurpose Paper, Letter Size Paper, 24 Lb, White, Ream Of 500 Sheets</b> Item # 254268 Entered Item # 254268  Eco-conscious	<b>\$12.19 /ream</b>	10

[Continue Shopping](#)

**SHOPPING CART** **CHECK OUT**

8 Items should appear in your active shopping cart



		
9	<p>Click on the text box next to <b>Name This Cart</b> and enter a name for the cart that will be more meaningful to you and any Requestor or Approvers who will need to review your order</p> 	
10	<p>The Shopper role does not have the permission to assign the charging FOAP. Shoppers assign their carts to a Requestor. Click the <b>Assign Cart</b> button to assign the cart.</p> 	
11	<p>Click on the <b>Search for an assignee</b> link.</p>	

Assign Cart

Select from profile values

Search for an assignee

Selected Assignee:

Assign Cart To:

Note To Assignee:

Search for an assignee

Assign

Close

12

Enter either the **Last Name** or **First Name** of the Requestor then click on the **Search** button

User Search

Last Name

requestor

First Name

rachel

User Name

Email

Department

Position

Results Per Page

10

Search

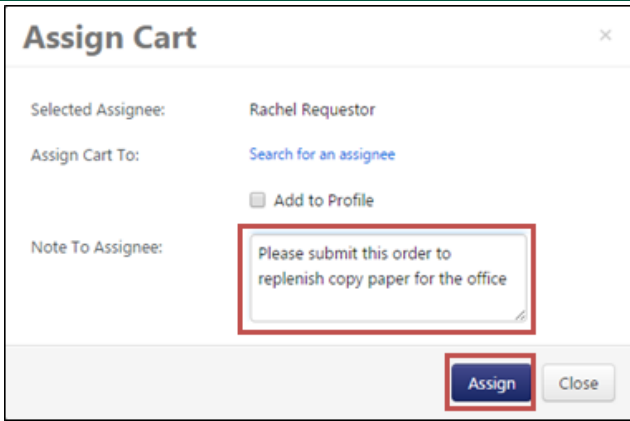
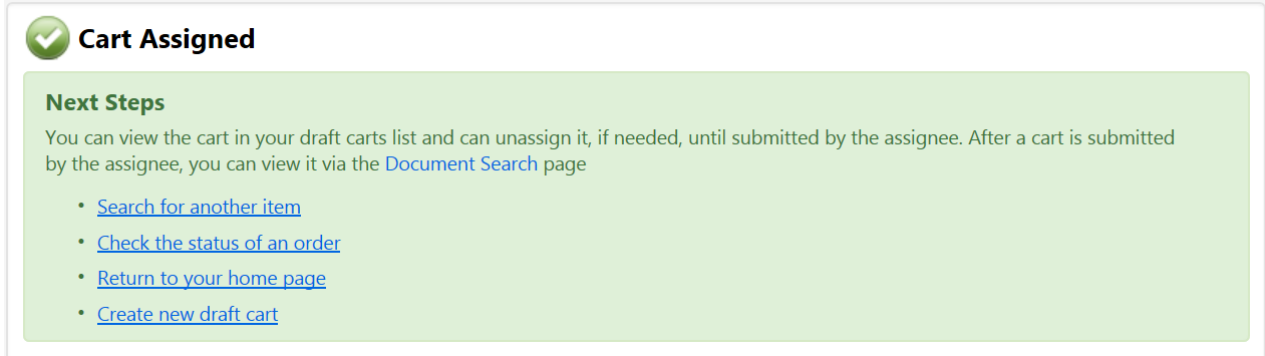
13

Find the name of the Requestor in your department and click **Select**.

Name ▲	User Name ▲	Email ▲	Phone	Action
Requestor, Rachel	requestor	msquarebriggs@jaggaer.com		[select]

14

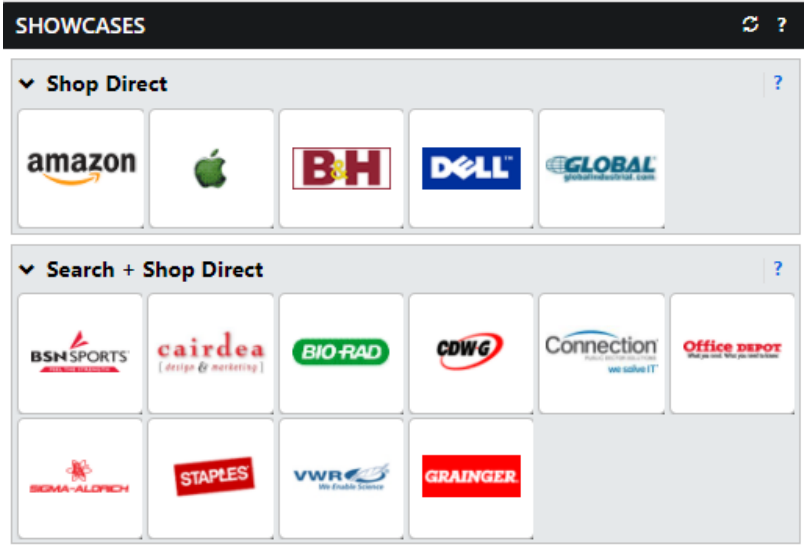
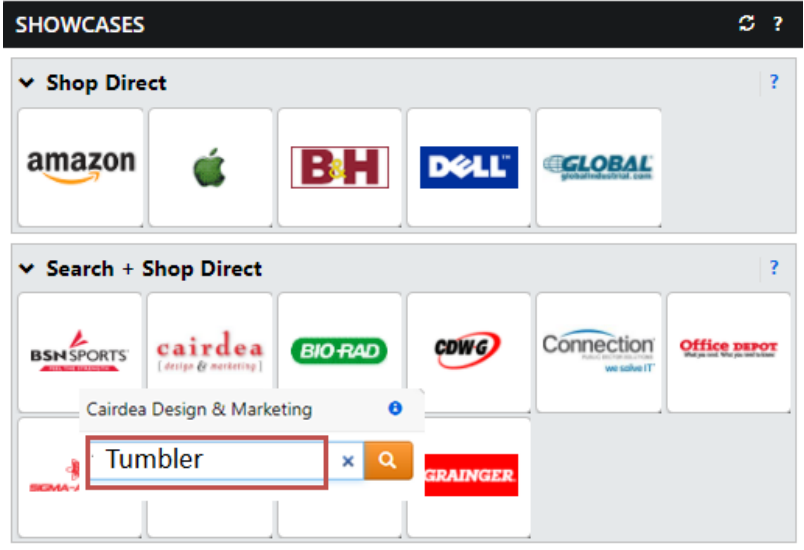
Fill in the **Note to Assignee** field with a brief description of the order then click on the **Assign** button.

	
15	<p>System message indicates your cart was successfully assigned</p> 

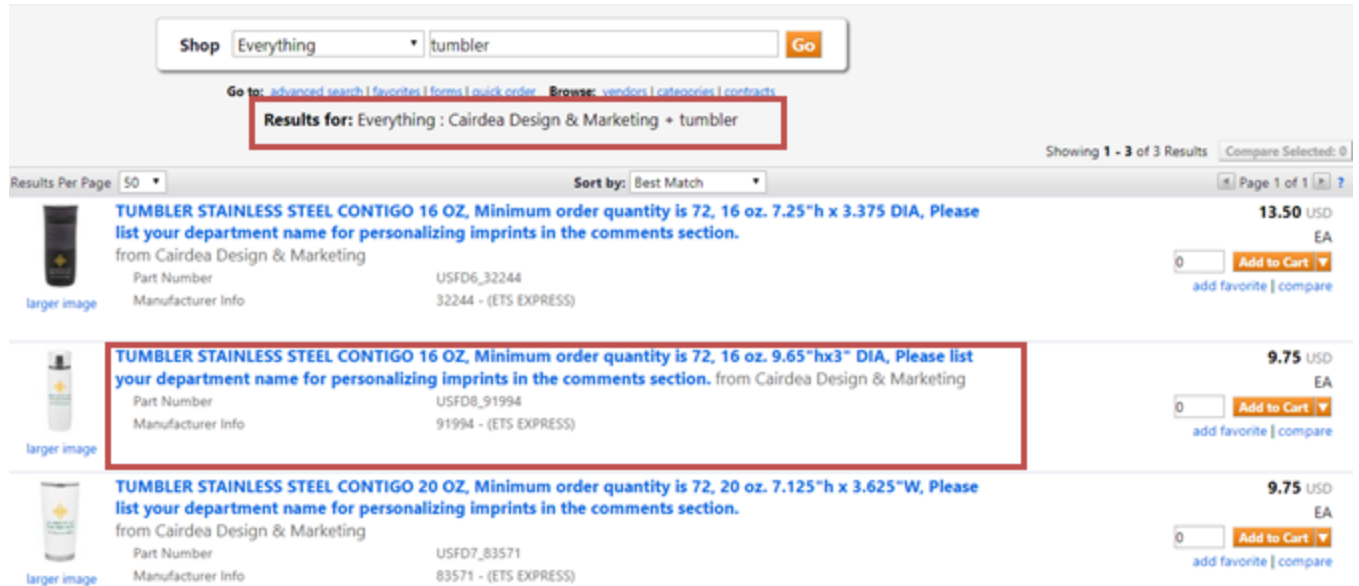
## Exercise 5: Shopping from a Hosted Catalog

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

Step	Description
1	Login to Hilltop Shop using the username and password provided to you for training. In production, Hilltop Shop is accessed through myUSF using your username and password.
2	From the homepage, navigate to the <b>Showcases</b> located in the lower right of the dashboard. Under <b>Showcases</b> lists the Vendors that are available.

	
3	<p>Select a Vendor. Type in either the description or part number for the item and click the <b>Search Icon</b>.</p> 
4	<p>Below are the search results for 'tumbler' from Cairdea Design and Marketing Hosted Catalog.</p>

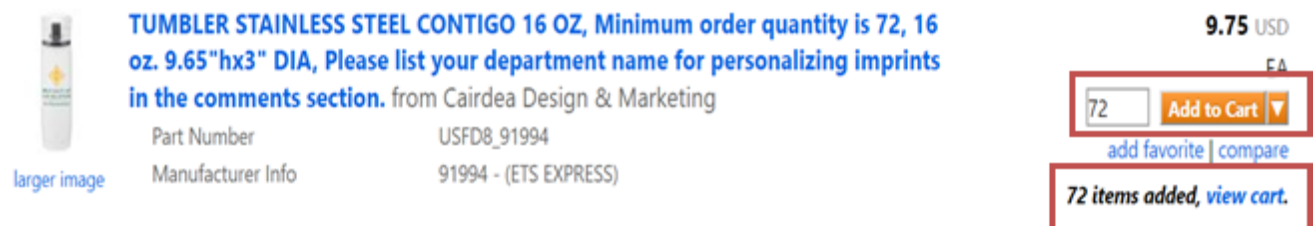
**Helpful  
Tips**



The screenshot shows the Hilltop Shop search results for 'tumbler'. The search bar at the top shows 'Shop Everything' and 'tumbler' with a 'Go' button. Below the search bar, a red box highlights the text 'Results for: Everything : Cairdea Design & Marketing + tumbler'. The results are sorted by 'Best Match' and show 3 items. The first item is 'TUMBLER STAINLESS STEEL CONTIGO 16 OZ, Minimum order quantity is 72, 16 oz. 7.25"h x 3.375 DIA, Please list your department name for personalizing imprints in the comments section.' with a price of 13.50 USD. The second item is 'TUMBLER STAINLESS STEEL CONTIGO 16 OZ, Minimum order quantity is 72, 16 oz. 9.65"h x 3" DIA, Please list your department name for personalizing imprints in the comments section.' with a price of 9.75 USD. The third item is 'TUMBLER STAINLESS STEEL CONTIGO 20 OZ, Minimum order quantity is 72, 20 oz. 7.125"h x 3.625"W, Please list your department name for personalizing imprints in the comments section.' with a price of 9.75 USD. Each item has a 'larger image' link, a 'Part Number', 'Manufacturer Info', and an 'Add to Cart' button.

Please review item descriptions for special instructions from the vendor. In this example, the vendor has a minimum order quantity of 72 each and personalization instructions are required for the vendor to process the order.

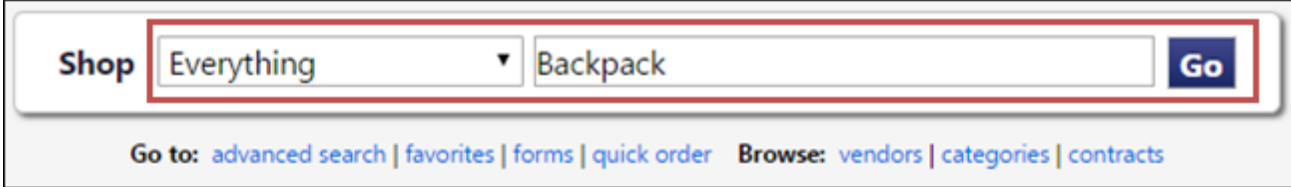
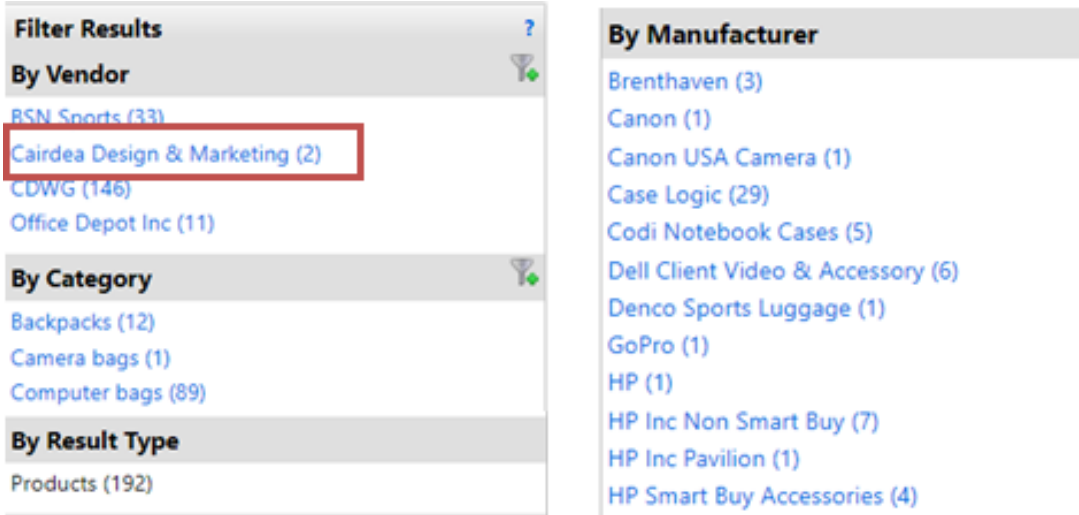
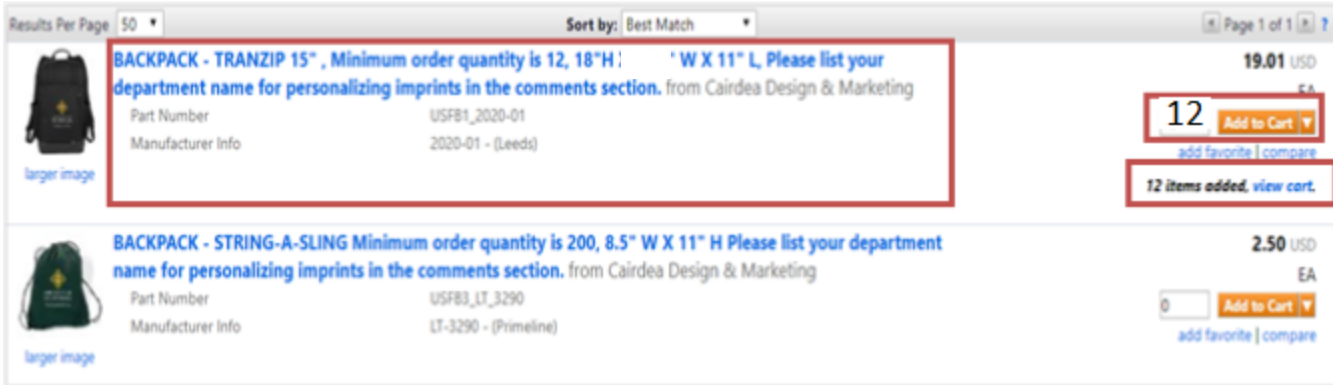
- 5 To add the item of choice to your cart, type in quantity and click on **Add to Cart**. The refreshed screen shows the items are added to your cart



The screenshot shows the 'Add to Cart' button for the 'TUMBLER STAINLESS STEEL CONTIGO 16 OZ, Minimum order quantity is 72, 16 oz. 9.65"h x 3" DIA, Please list your department name for personalizing imprints in the comments section.' item. The quantity '72' is entered in the input field next to the 'Add to Cart' button. Below the button, a red box highlights the text '72 items added, view cart.'

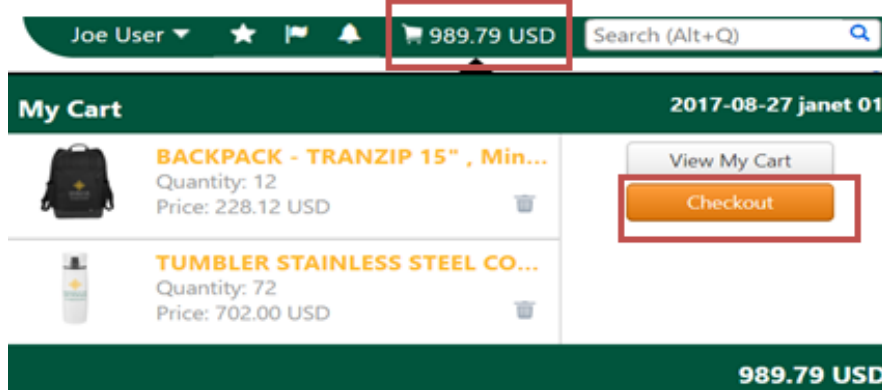
- 6 To add additional items to a cart, scroll to the top of the page and type in the product description or part number in the search bar. Click **Go**.



	
7	<p>If the search returns too many products or options, you can apply filters to narrow the selection. For this exercise, please select Cairdea Design &amp; Marketing.</p> 
8	<p>Review item description, type in quantity and click <b>Add to Cart</b>. The refreshed screen shows the items are added to your cart</p>  <p>In  this example, the vendor has a minimum order quantity of 12 each and personalization instructions are required for the vendor to process the order.</p>

9 Click the shopping cart icon at the top of the screen next to the cart total of \$989.79. A summary of your cart will display.

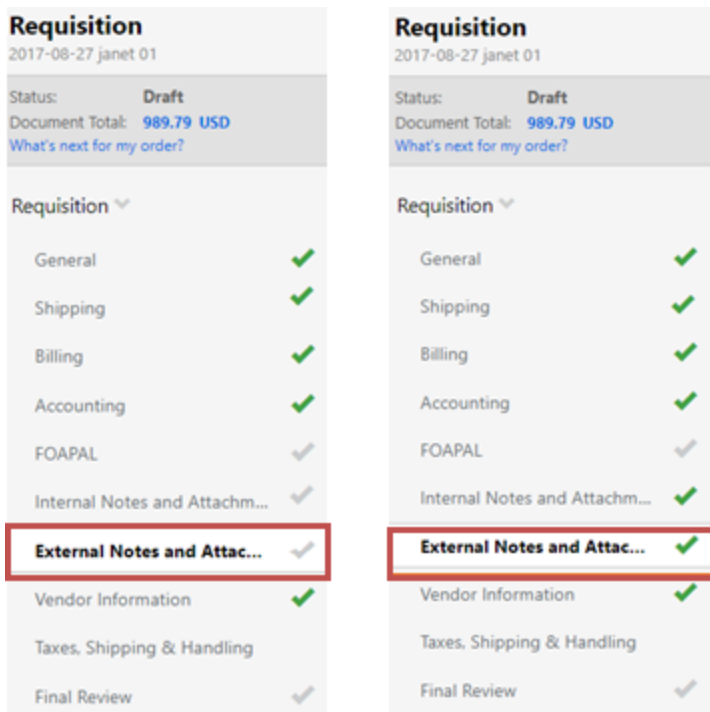
As called out in Step 4, the Vendor requires personalization instructions to process the order. You will provide the vendor with instructions in the **External Notes and Attachments** section of the Requisition. To access this section, click **Checkout**



If the vendor **does not** require an External Note and Attachments, click **View My Cart** and proceed to Step 13.

10 **OPTIONAL**

- A. To include vendor comments and attachments, Click **External Notes and Attachments** from the left navigation bar. The checkmark will not turn green until you have completed this step



**Reminder:** A Shopper cannot complete the FOAPAL field because of Banner Security. The Shopper must **ASSIGN** cart to a Requestor to provide FOAP information.

- B. To review the notes and attachments that are included with your cart, Click **External Notes and Attachments** after the check mark turns green. This section will display the note to the vendor and the name of the attached file. Detailed instructions are available in Step 11

	<p><b>External Notes and Attachments</b> <span>Document Actions ▾   History   1</span></p> <p>Note to all Vendors</p> <p>Attachments for all vendors</p> <p><a href="#">Add Attachments</a></p> <p><a href="#">Specs-Cairdea Design.pdf</a></p> <p>Please imprint on the tumblers and backpack: Purchasing &amp; Ancillary Services</p> <p>Size Attached on 125.0 KB 8/27/2017</p> <p><a href="#">edit</a></p> <p><a href="#">Remove</a> ▾</p> <p>Remove Move to Internal Attachments</p> <p><b>Helpful Tips</b></p> <p>Click the <b>edit</b> button to revise or remove vendor notes. To download the attachment, click on the attachment file name. Click the <b>Remove</b> down arrow to display dialog box and select <b>Remove</b> or <b>Move to Internal Attachments</b>.</p>
11	<p><b>OPTIONAL</b></p> <p>A. To add <b>External Notes and Attachments</b>, click <b>edit</b> located on the left of the screen</p> <p><b>External Notes and Attachments</b> <span>Document Actions ▾   History   ?</span></p> <p>Note to all Vendors</p> <p>Attachments for all vendors</p> <p><a href="#">Add Attachments</a></p> <p>no note</p> <p>Size Attached on</p> <p><a href="#">edit</a></p> <p>B. <b>External Info</b> dialog box opens, type in the imprint instruction and click <b>Save</b></p>

## External Info

Note to all Vendors

Please imprint on the tumblers and  
backpack:  
Purchasing & Ancillary Services

[expand](#) | [clear](#)

**Save**

Cancel

- C. To include an **External Attachment**, click the **Add Attachments** button. The **Add Attachments** dialog box opens, click **Select files** to attach the file from your computer, click **Save Changes**. The green box indicates the PDF was 100% loaded.

## Add Attachments

Attachment Type

☒ File ☐ Link

File \*

Select files...

Done ✓

Specs-Cairdea Design.pdf

100% ✕

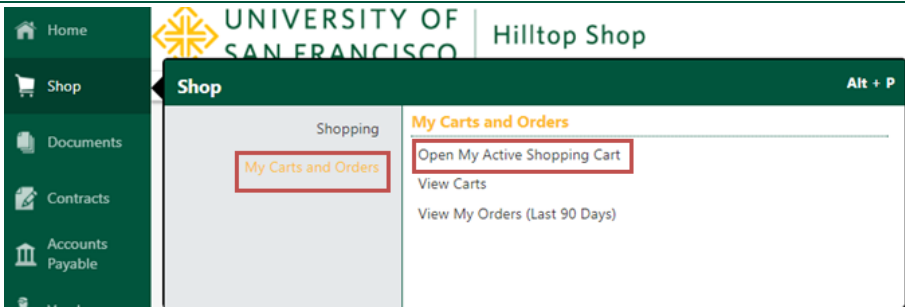
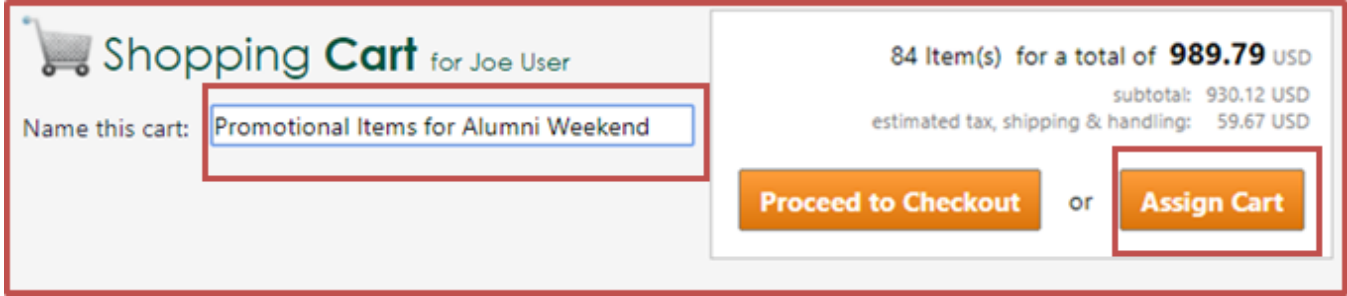

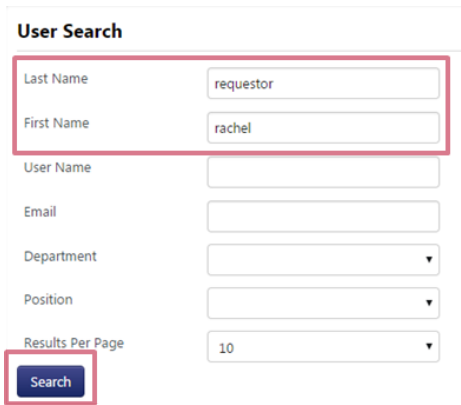
Maximum upload file size: 23.84 MB

★ Required

**Save Changes**

Close

- 12 Follow the path to complete your Shopping Cart. Alternatively, you may use the Alt + P shortcut to open the Shop Dialog Box. Click **My Carts and Orders** and select **Open My Active Shopping Cart**

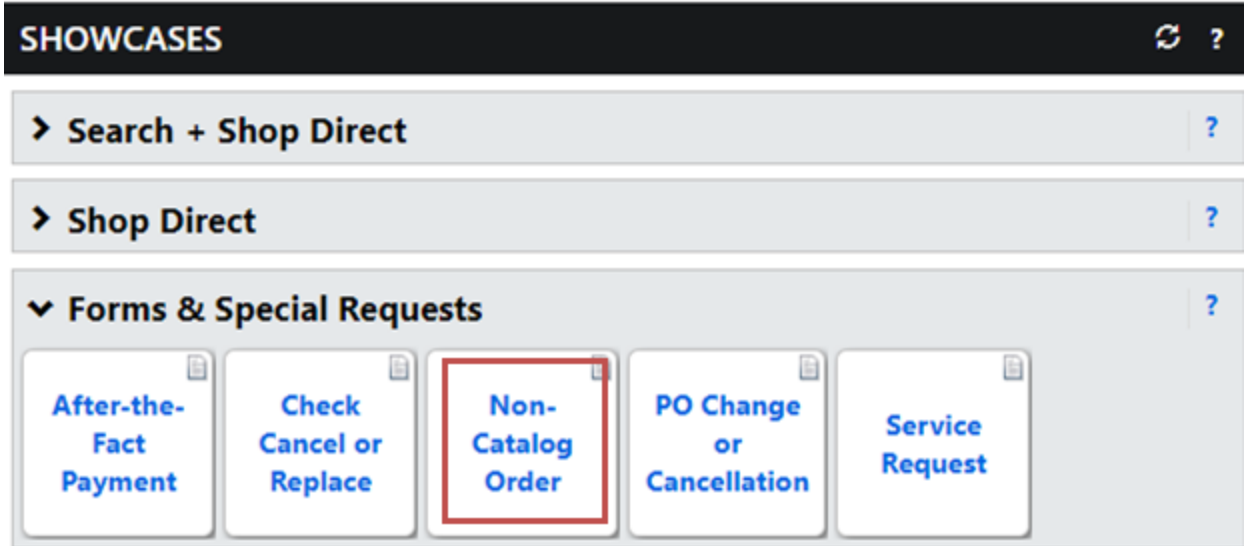
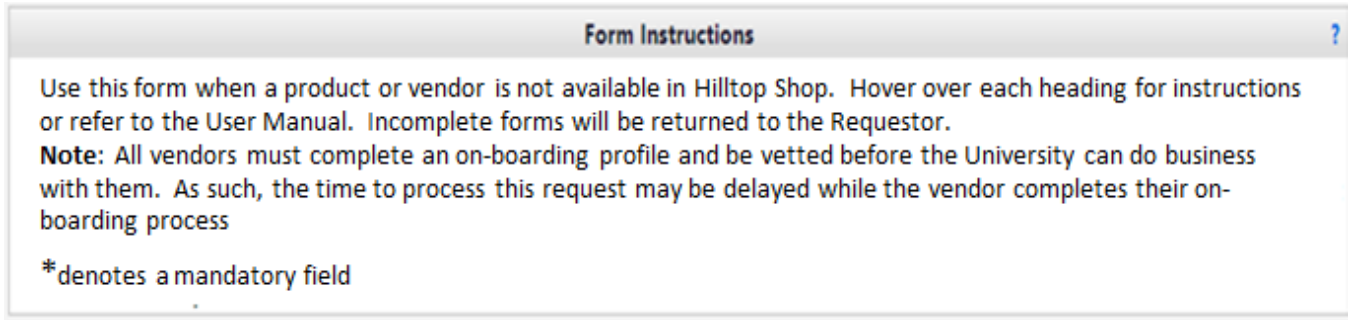
	
13	<p>Click on the text box next to <b>Name This Cart</b> and enter a name for the cart that will be more meaningful to you and any Requestor or Approvers who will need to review your order. Click on <b>Assign Cart</b></p> 
14	<p>Click on the <b>Search for an assignee</b> link.</p> 
15	<p>Enter Last Name or <b>First Name</b> of the Requestor and click the <b>Search</b> button.</p> 


16	Find the name of the Requestor in your department and click <b>Select</b> .										
	<table><tr><th>Name ▲</th><th>User Name ▲</th><th>Email ▲</th><th>Phone</th><th>Action</th></tr><tr><td>Requestor, Rachel</td><td>requestor</td><td>msquarebriggs@jaggaer.com</td><td></td><td>[select]</td></tr></table>	Name ▲	User Name ▲	Email ▲	Phone	Action	Requestor, Rachel	requestor	msquarebriggs@jaggaer.com		[select]
Name ▲	User Name ▲	Email ▲	Phone	Action							
Requestor, Rachel	requestor	msquarebriggs@jaggaer.com		[select]							
17	Fill in the <b>Note to Assignee</b> field with a brief description of the order and click on the <b>Assign</b> button.										
	<div><div>Assign Cart</div><div><div>Selected Assignee:</div><div>Rachel Requestor</div></div><div><div>Assign Cart To:</div><div>Search for an assignee</div></div><div><input type="checkbox"/> Add to Profile</div><div><div>Note To Assignee:</div><div>Please submit this order for products we plan to give away at the next event.</div></div><div><div>Assign</div><div>Close</div></div></div>										
18	System message indicates your cart was successfully assigned										
	<div><div><div>✓</div><div>Cart Assigned</div></div><div><div>Next Steps</div><div>You can view the cart in your draft carts list and can unassign it, if needed, until submitted by the assignee. After a cart is submitted by the assignee, you can view it via the <a href="#">Document Search</a> page</div><div><div><a href="#">Search for another item</a></div><div><a href="#">Check the status of an order</a></div><div><a href="#">Return to your home page</a></div><div><a href="#">Create new draft cart</a></div></div></div></div>										

## Exercise 6: Shopping using the Non-Catalog Form

Hilltop Shop has a variety of Hosted Catalogs and Punch-Out Stores. However, there will be many occasions where users will need to submit a requisition for products and/or services that are not available through the Hosted Catalogs or Punch-Out stores showcased. To accomplish this, Hilltop Shop has several forms setup to facilitate submitting a requisition. The Non-Catalog form should only be used to request products not available in an existing Hosted Catalog or Punch-Out Store. **Note:** There is a separate form for requesting services (covered in the next exercise).


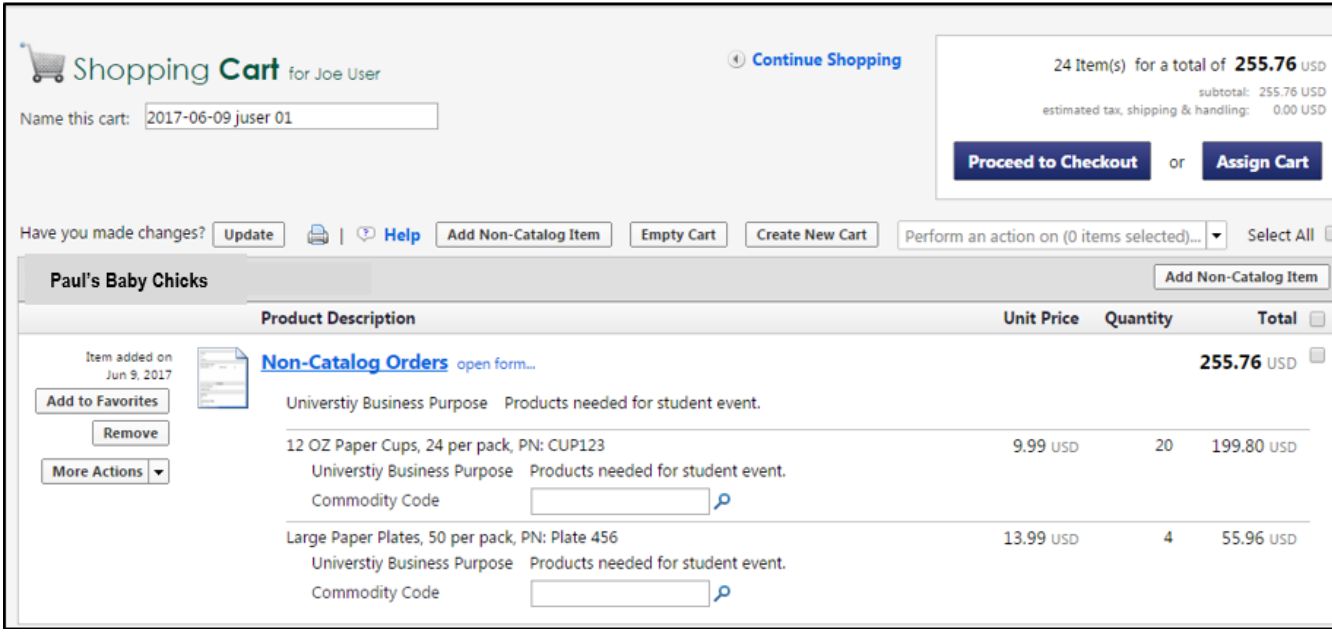
Step	Description
------	-------------

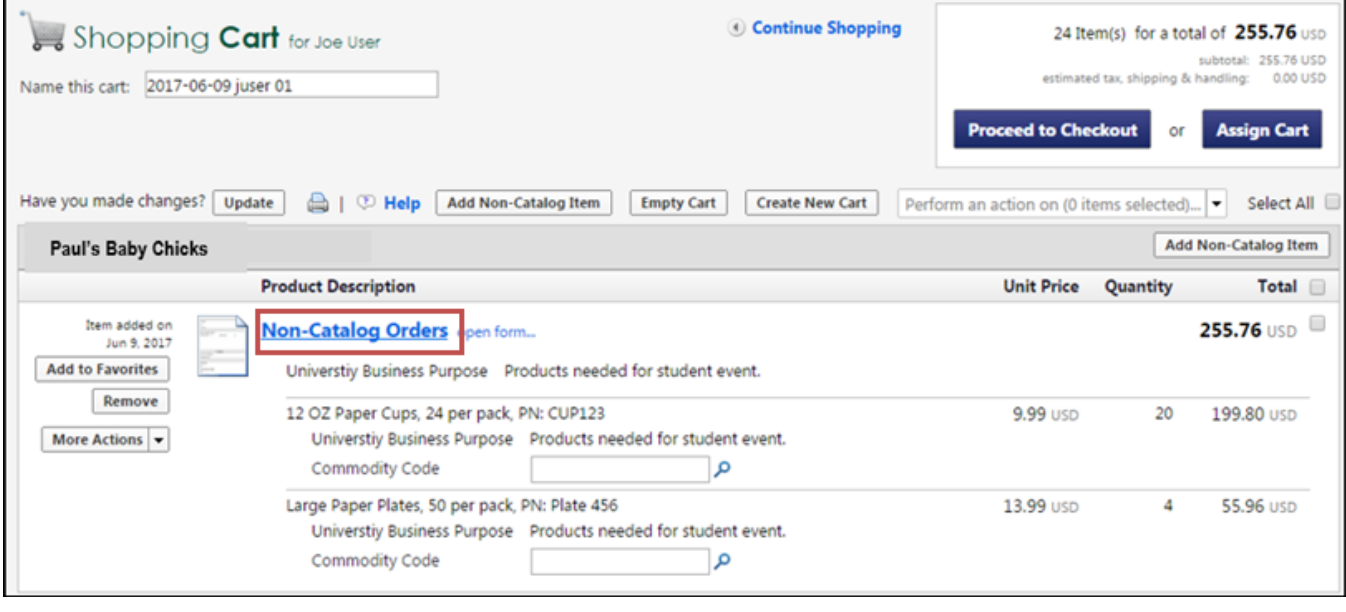
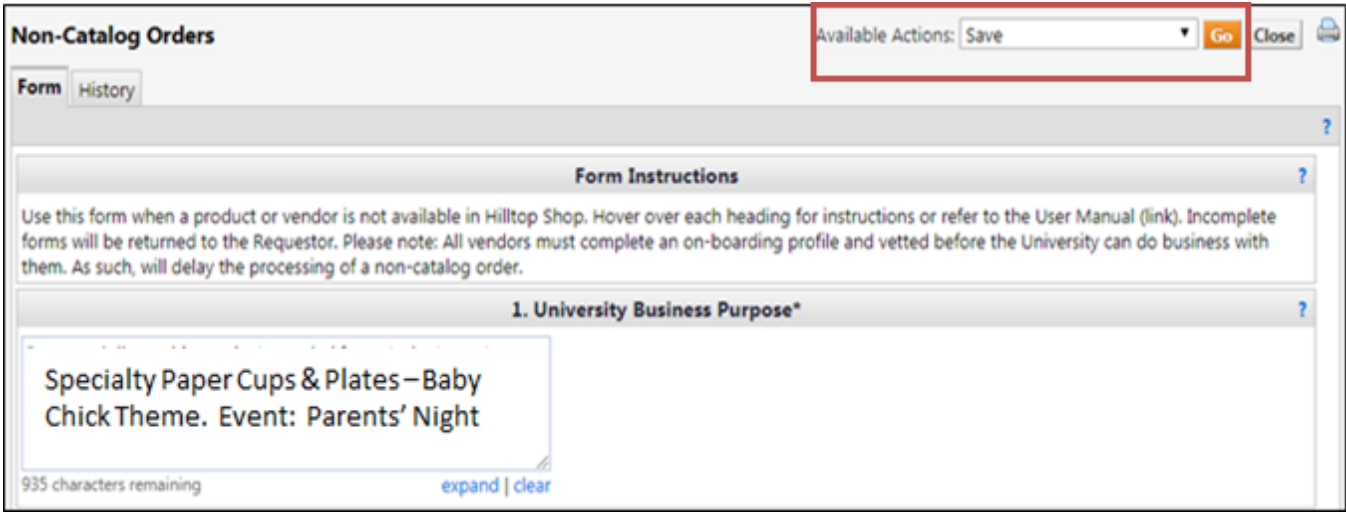
1	Login to Hilltop Shop using the username and password provided to you for training. In production, Hilltop Shop is accessed through myUSF using your username and password.
2	<p>From the homepage, navigate to the <b>Forms</b> section, located under <b>Showcases</b>. Click on <b>Non-Catalog Order</b> sticker.</p>  <p>The screenshot shows the 'SHOWCASES' header with a refresh and help icon. Below are three expandable sections: 'Search + Shop Direct', 'Shop Direct', and 'Forms &amp; Special Requests'. The 'Forms &amp; Special Requests' section is expanded, showing five buttons: 'After-the-Fact Payment', 'Check Cancel or Replace', 'Non-Catalog Order' (highlighted with a red border), 'PO Change or Cancellation', and 'Service Request'.</p>
3	<p>The Non-Catalog Order form will open. Please read the <b>Form Instructions</b> at the top of the screen before filling out the form.</p>  <p>The screenshot shows the 'Form Instructions' header. The text reads: 'Use this form when a product or vendor is not available in Hilltop Shop. Hover over each heading for instructions or refer to the User Manual. Incomplete forms will be returned to the Requestor. <b>Note:</b> All vendors must complete an on-boarding profile and be vetted before the University can do business with them. As such, the time to process this request may be delayed while the vendor completes their on-boarding process. *denotes a mandatory field'.</p>
4	Complete the <b>University Business Purpose</b> section by typing the purpose of the purchase (Note: this is a required section)

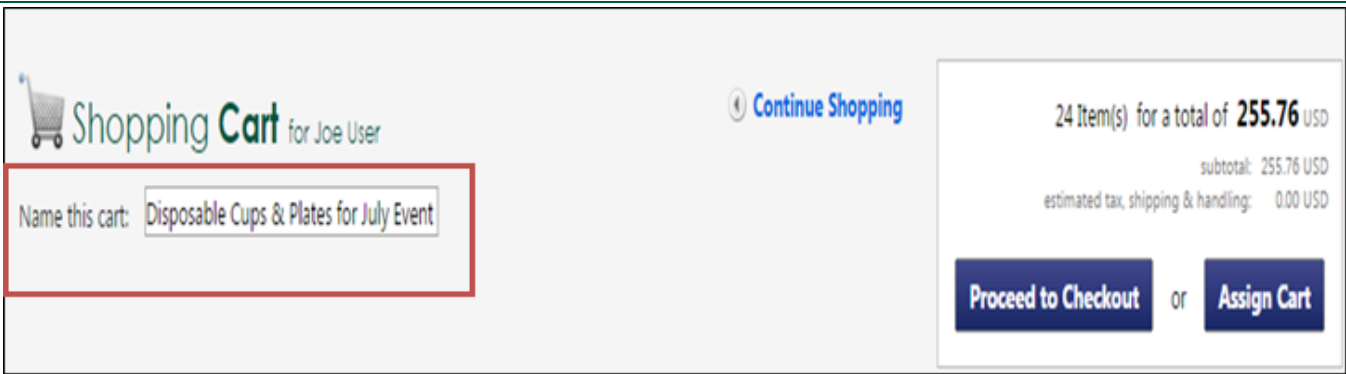
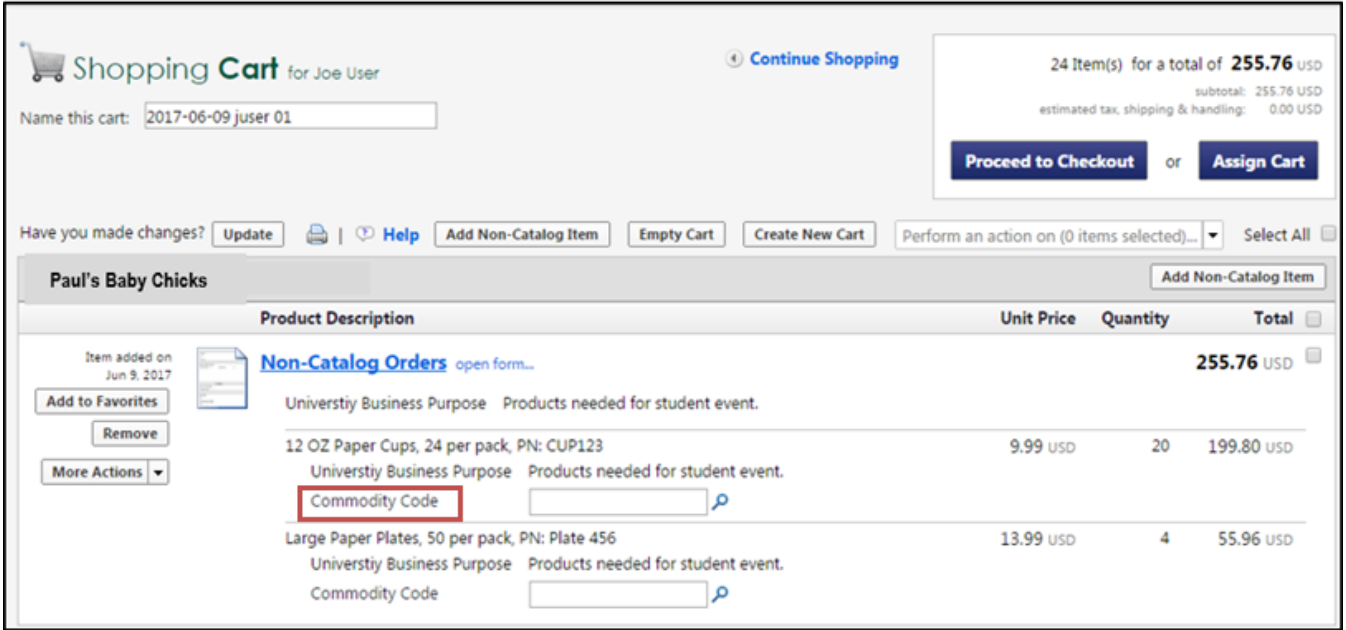
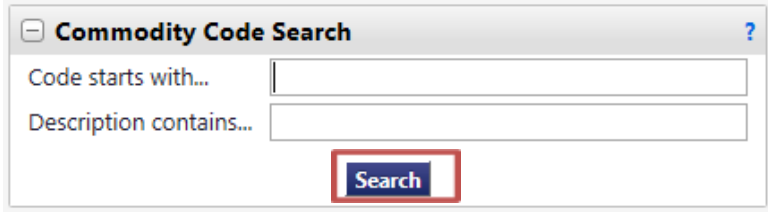
	<div> <div>1. University Business Purpose ?</div> <div> <div>Specialty Paper Cups &amp; Plates – Baby Chick Theme. Event: Parents’ Night</div> <div>185 characters remaining</div> <div>expand   clear</div> </div> </div>
5	<p>Please complete the <b>Sole Source Justification</b> if competitive quotes are not attached to orders \$5k and over. Please consult USF Procurement Policy for guidance. Formal Sourcing Events (RFx) are required for purchases \$50,000 or greater Use the drop down box to select a <b>Justification Reason</b>.</p> <div> <div>2. Sole or Single Source Justification ?</div> <div> <div>Sourcing Justification Reason</div> <div> <ol style="list-style-type: none"> <li>1. Sole Source: The product or service is available from only one source.</li> <li>2. Single Source: There is only one vendor qualified to provide the product or services.</li> <li>3. Emergency Order: An unusual or compelling urgency exists.</li> <li>4. The product or service must match or be compatible with current equipment or services.</li> <li>5. The product or service needed is controlled/mandated by USF Policy, local utility or government</li> <li>6. The product or service needed is specifically required for use in conjunction with a grant or con</li> <li>7. Artistic Services</li> <li>8. Capital project expenditure (grant-funded excluded) to meet specific timeline; VP approved</li> </ol> </div> </div> </div>
6	<p>Click the <b>Add Attachments</b> to provide supplemental information or quotes.</p> <p><b>Internal Attachments</b> are <b>only</b> viewable to USF employees; they are not sent to the Vendor. Examples of internal attachments are:</p> <ul style="list-style-type: none"> <li>▪ Quotes provided by all vendors</li> <li>▪ Internal USF information that is important for approvers to review</li> </ul> <p><b>External Attachments</b> are sent to the vendor when the PO is dispatched. <b>Only</b> include attachments you intend to share with the vendor. Examples of external attachments are:</p> <ul style="list-style-type: none"> <li>▪ Quote provided by the vendor the purchase is being made against</li> <li>▪ Specifications or other documentation the vendor will need to process the order</li> </ul> <p>Note: The maximum file size is 50 MB</p> <div> <div> <div>3. Supporting Attachments ?</div> <div> <div>Internal Attachments External Attachments</div> <div>Add Attachments Add Attachments</div> </div> </div> <div>  <p>To review, edit, or remove notes and attachments, please refer to Exercise 5, Steps 10 and 11 for detailed instructions.</p> </div> </div>
7	<p>Add attachments by selecting the file from your computer or by entering a link to a website. Click <b>Save Changes</b>.</p>

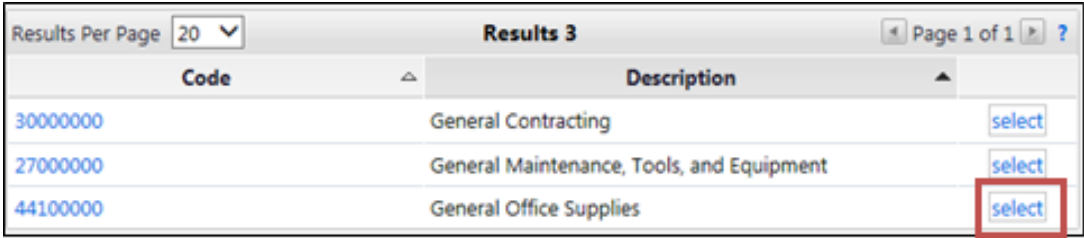

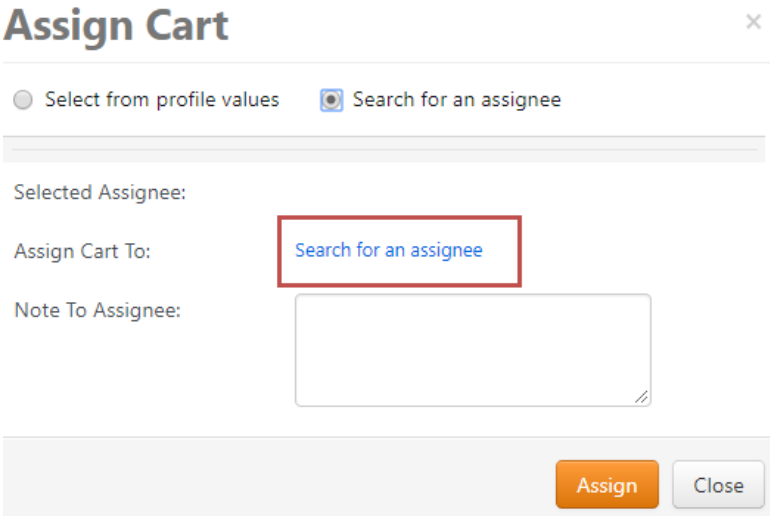


	<div><div>Add Attachments</div><div><div>Attachment Type</div><div><input checked="" type="radio"/> File <input type="radio"/> Link</div><div>File *</div><div><div>Select files...</div><div>Maximum upload file size: 23.84 MB</div></div></div><div><div>* Required</div><div>Save Changes</div><div>Close</div></div></div>
8	<div><div>Enter the <b>Vendor Information</b>. Use the search box to search for existing vendors and select the matching vendor.</div><div><div><div>Vendor Information*</div><div><div>Steps</div><div><div>1. Using the search box, enter the vendor name for the non-catalog order.</div><div>2. If the vendor is found, select the matching vendor.</div></div></div><div><div>Search Existing Vendors</div><div><div><div></div><div>or</div><div>Search Existing Vendors</div></div></div></div></div><div><div><div>Helpful Tins</div><div>If the vendor information is not in Hilltop Shop, users are required to submit the “New Vendor Request by USF Shopper” form. The form is available in the Quick Links box at the shopping home page</div></div></div></div></div>
9	<div><div>By selecting <b>Search Existing Vendors</b>, a new page should appear. Type the vendor’s name into the search box, click <b>Select</b> next to the first address in the list.</div><div><div><div>Vendor Search</div><div><div>Vendor</div><div><div>Paul’s Baby Chicks</div><div></div></div></div><div><div>Results Per Page 20</div><div>Vendors found: 1</div><div>Page 1 of 1</div></div><div><div>Vendor Name/Address</div><div>Select</div></div><div><div>Paul’s Baby Chicks</div><div>PO Purchase Orders 1: 123 Anywhere St, SF CA 94118-1008 US</div><div>Select</div></div></div></div></div>
10	<div><div>Scroll down to the <b>Product List</b>. Enter the <b>Part Number/Description</b>, the <b>Unit Price</b>, and <b>Quantity</b>. Scroll down to the next line item and repeat this step to add additional items.</div><div><div><div>Products List*</div><div><div>Part #/Description</div><div><div></div><div>254 characters remaining expand clear</div></div></div><div><div>Unit Price</div><div>Quantity</div></div></div></div></div>

11	<p>Once the form is completed, scroll up to the top of the page and click on the drop down menu next to <b>Available Actions</b> in the upper right-hand corner. Select <b>Add and Go To Cart</b> and press the <b>Go</b> button.</p> 
12	<p>The items should now appear in your active shopping cart.</p> 
13	<p>If you need to make modifications to the form (update price, quantity, descriptions, etc...), click on <b>Non-Catalog Orders</b> link above the line items.</p>

	 <p>Shopping Cart for Joe User</p> <p>Name this cart: 2017-06-09 juser 01</p> <p>24 Item(s) for a total of 255.76 USD subtotal: 255.76 USD estimated tax, shipping &amp; handling: 0.00 USD</p> <p>Proceed to Checkout or Assign Cart</p> <p>Have you made changes? Update   Help   Add Non-Catalog Item   Empty Cart   Create New Cart   Perform an action on (0 items selected)...   Select All</p> <p>Paul's Baby Chicks</p> <p>Product Description Unit Price Quantity Total</p> <p>Item added on Jun 9, 2017</p> <p>Add to Favorites Remove More Actions</p> <p>Non-Catalog Orders open form...</p> <p>Universtiy Business Purpose Products needed for student event.</p> <p>12 OZ Paper Cups, 24 per pack, PN: CUP123 9.99 USD 20 199.80 USD</p> <p>Universtiy Business Purpose Products needed for student event.</p> <p>Commodity Code</p> <p>Large Paper Plates, 50 per pack, PN: Plate 456 13.99 USD 4 55.96 USD</p> <p>Universtiy Business Purpose Products needed for student event.</p> <p>Commodity Code</p>
14	<p>The form will reopen, and you can change the information in the form. Once complete, scroll back to the top of the form, make sure the <b>Available Actions</b> is set to <b>Save</b>, then click on <b>Go</b>.</p>  <p>Non-Catalog Orders</p> <p>Available Actions: Save Go Close</p> <p>Form History</p> <p>Form Instructions</p> <p>Use this form when a product or vendor is not available in Hilltop Shop. Hover over each heading for instructions or refer to the User Manual (link). Incomplete forms will be returned to the Requestor. Please note: All vendors must complete an on-boarding profile and vetted before the University can do business with them. As such, will delay the processing of a non-catalog order.</p> <p>1. University Business Purpose*</p> <p>Specialty Paper Cups &amp; Plates – Baby Chick Theme. Event: Parents' Night</p> <p>935 characters remaining expand clear</p>
15	<p>Click on the text box next to <b>Name This Cart</b> and enter a name for the cart that will be more meaningful to you and any Requestor or Approvers who will need to review your order.</p>

	
16	<p><b>Optional:</b> Users can update the <b>UNSPSC Commodity Code</b> for each line item created from the non-catalog form. Click on the magnifying glass icon for each line item to add the appropriate commodity code</p> <div data-bbox="224 772 349 898"> <p><b>Helpful Tips</b></p> </div> <p>The UNSPSC Commodity Code <b>is not required</b> to submit the form. Purchasing &amp; Ancillary Services (PaAS) will assign the proper UNSPSC Commodity Code that matches the items or services ordered.</p> 
17	<p><b>Optional:</b> Search for the UNSPSC Commodity Code by <b>Code starts with</b> or <b>Description contains</b> and click <b>Search</b>.</p> 

	<p>After finding the correct Commodity Code, click <b>Select</b>. Repeat this step for each line item in the Shopping Cart</p> 
18	<p>Click the <b>Assign Cart</b> button</p> 
19	<p>Click on the <b>Search for an assignee</b> link.</p> 
20	<p>Enter either the <b>Last Name</b> or <b>First Name</b> of the Requestor then click on the <b>Search</b> button</p>

User Search

Last Name

requestor

First Name

rachel

User Name

Email

Department

Position

Results Per Page

10

Search

21

Find the name of the Requestor in your department and click **Select**.

Name ▲	User Name ▲	Email ▲	Phone	Action
Requestor, Rachel	requestor	msquarebriggs@jaggaer.com		[select]

22

Fill in the **Note to Assignee** field with a brief description of the order then click on the **Assign** button.

Assign Cart

Selected Assignee:

Rachel Requestor

Assign Cart To:

Search for an assignee

☐

Add to Profile

Note To Assignee:

Please review and submit this order for paper cups and plates we need for next week's event

Assign

Close

23

System message indicates your cart was successfully assigned



### Cart Assigned

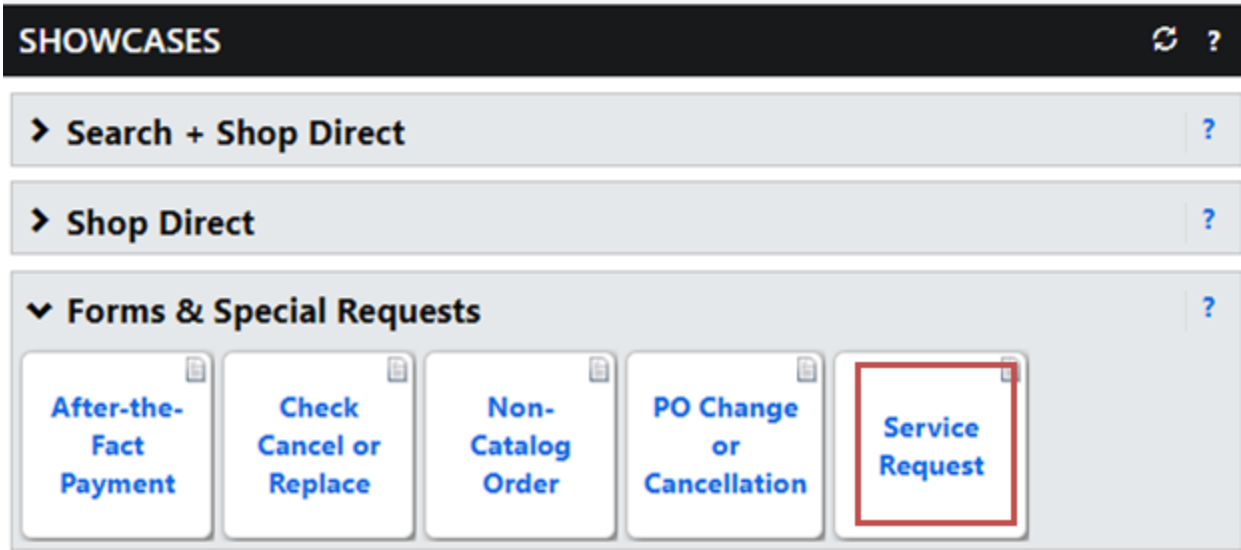
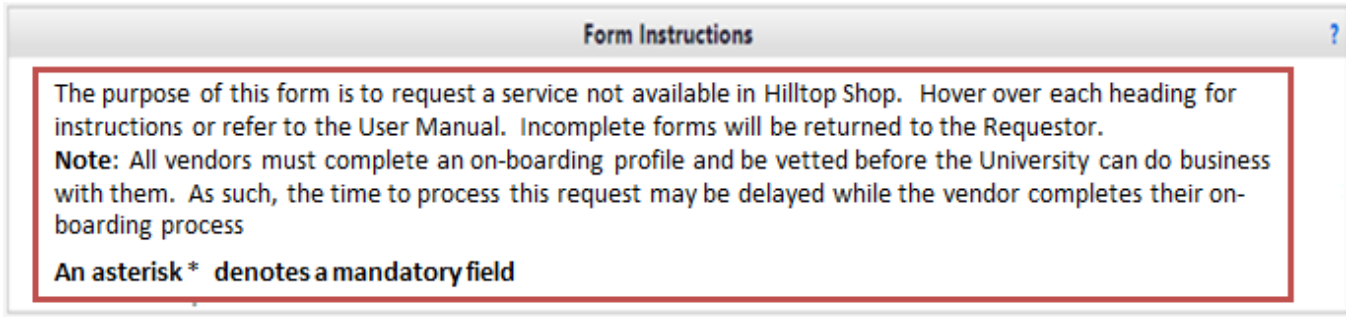
#### Next Steps

You can view the cart in your draft carts list and can unassign it, if needed, until submitted by the assignee. After a cart is submitted by the assignee, you can view it via the [Document Search](#) page


- [Search for another item](#)
- [Check the status of an order](#)
- [Return to your home page](#)
- [Create new draft cart](#)

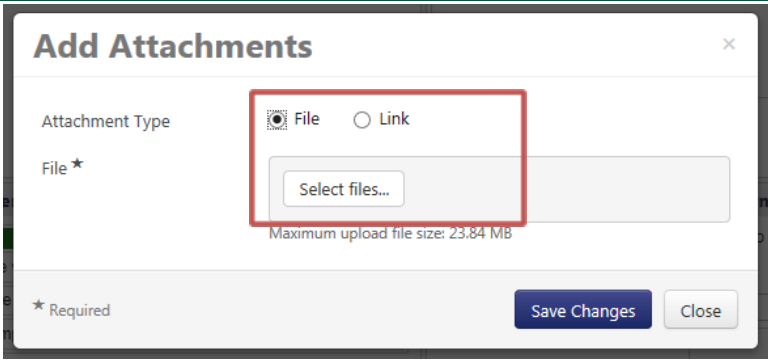
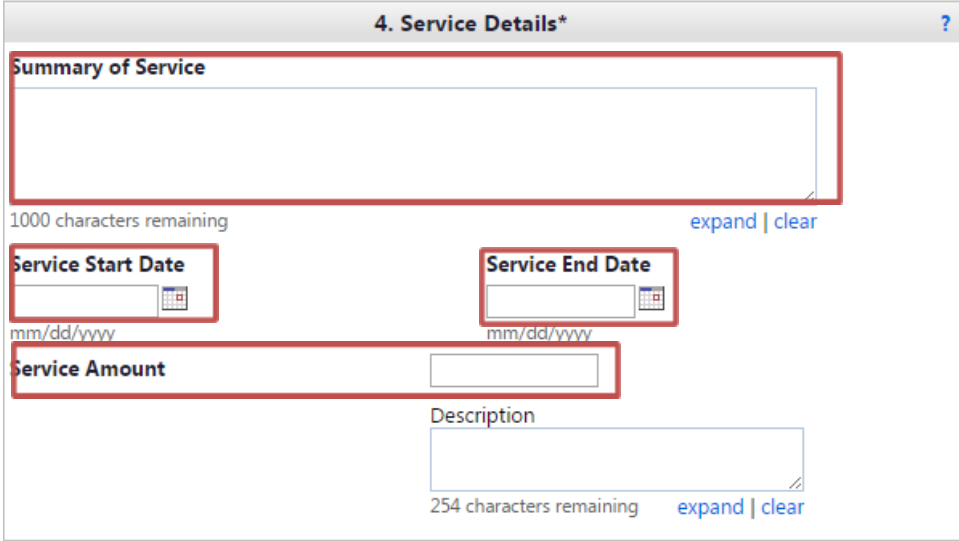
## Exercise 7: Shopping Using the Service Request Form

This exercise will cover how to complete a purchase request for services being performed by a vendor.

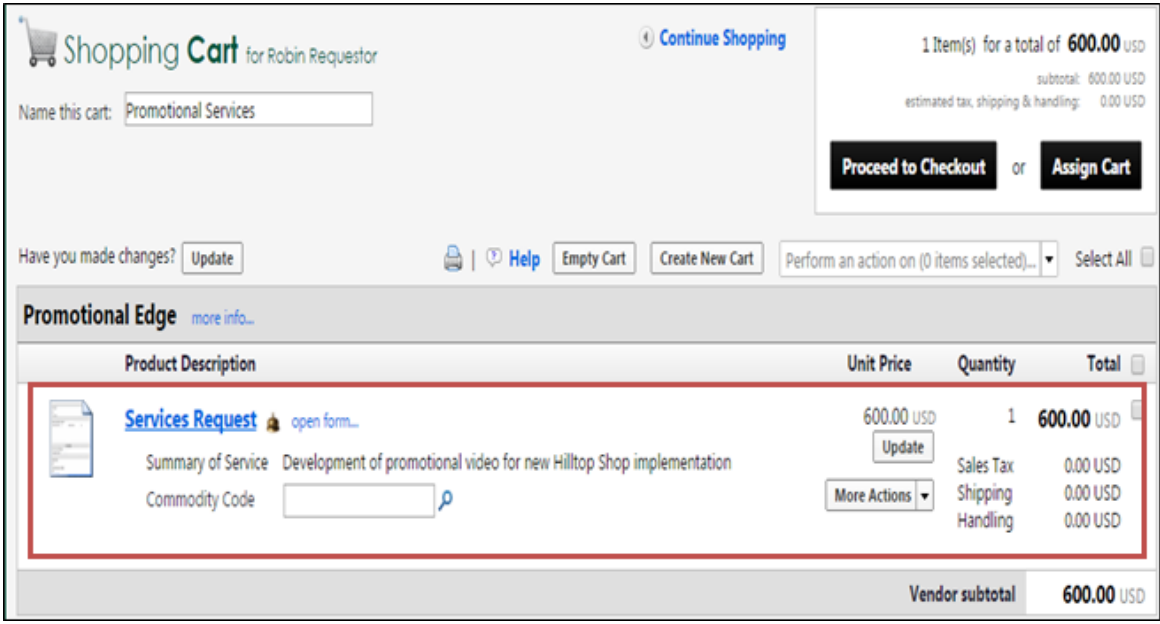

Step	Description
1	Login to Hilltop Shop using the username and password provided to you for training. In production, Hilltop Shop is accessed through myUSF using your username and password.
2	<p>From the homepage, navigate to the <b>Forms</b> section, located under <b>Showcases</b>. Click on <b>Service Request</b> sticker.</p> 
3	<p>The Service Request form will open. Please read the <b>Form Instructions</b> at the top of the screen before filling out the form.</p> 
4	Complete the <b>University Business Purpose</b> section by typing the purpose of the purchase (Note: this is a required section)

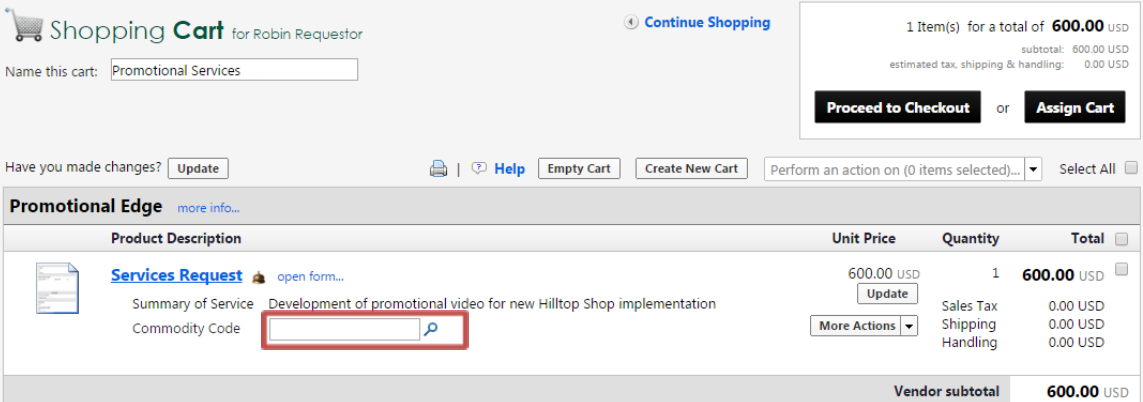
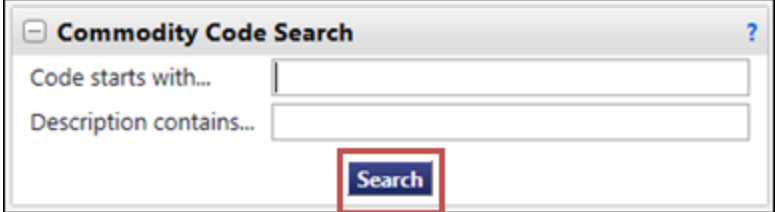
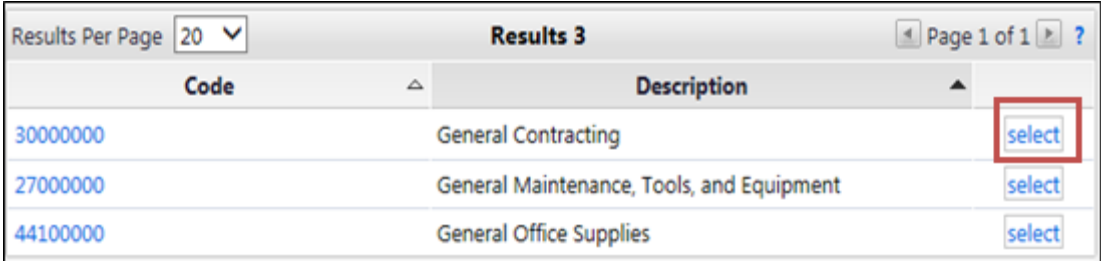



	<div> <div>1. University Business Purpose ?</div> <div> <div></div> <div>185 characters remaining</div> <div>expand   clear</div> </div> </div>
5	<p>Please complete the <b>Sole Source Justification</b> if competitive quotes are not attached to orders \$5k and over. Please consult USF Procurement Policy for guidance. Formal Sourcing Events (RFx) are required for purchases \$50,000 or greater Use the drop down box to select a <b>Justification Reason</b>.</p> <div> <div>2. Sole or Single Source Justification ?</div> <div> <div>Sourcing Justification Reason</div> <div> <div>▼</div> <div> 1. Sole Source: The product or service is available from only one source.  2. Single Source: There is only one vendor qualified to provide the product or services.  3. Emergency Order: An unusual or compelling urgency exists.  4. The product or service must match or be compatible with current equipment or services.  5. The product or service needed is controlled/mandated by USF Policy, local utility or government  6. The product or service needed is specifically required for use in conjunction with a grant or con  7. Artistic Services  8. Capital project expenditure (grant-funded excluded) to meet specific timeline; VP approved </div> </div> </div> </div>
6	<p>Click the <b>Add Attachments</b> to provide supplemental information or quotes.</p> <p><b>Internal Attachments</b> are <b>only</b> viewable to USF employees; they are not sent to the Vendor. Examples of internal attachments are:</p> <ul style="list-style-type: none"> <li>Quotes provided by all vendors</li> <li>Internal USF information that is important for approvers to review</li> </ul> <p><b>External Attachments</b> are sent to the vendor when the PO is dispatched. <b>Only</b> include attachments you intend to share with the vendor. Examples of external attachments are:</p> <ul style="list-style-type: none"> <li>Quote provided by the vendor the purchase is being made against</li> <li>Specifications or other documentation the vendor will need to process the order</li> </ul> <p>Note: The maximum file size is 50 MB</p> <div> <div> <div>3. Supporting Attachments ?</div> <div> <div>Internal Attachments External Attachments</div> <div> <div>Add Attachments</div> <div>Add Attachments</div> </div> </div> </div> <div>  <p>To review, edit, or remove notes and attachments, please refer to Exercise 5, Steps 10 and 11 for detailed instructions.</p> </div> </div>
7	<p>Attachments can be added by selecting a file from your computer or by entering a link to a website. Click <b>Save Changes</b></p>

	 <p>The 'Add Attachments' dialog box shows the 'Attachment Type' section with 'File' selected. A red box highlights the 'File' radio button, the 'Link' radio button, and the 'Select files...' button. Below the buttons, it states 'Maximum upload file size: 23.84 MB'. At the bottom, there are 'Save Changes' and 'Close' buttons, and a note that the asterisk (*) indicates required fields.</p>
8	<p>Complete the <b>Services Details</b> section with the specific details of the service including:</p> <ul style="list-style-type: none"> <li>• <b>Summary of Service:</b> Detailed description of the service the vendor will perform for USF</li> <li>• <b>Service Start Date:</b> The date the vendor will begin the work according to the statement of work</li> <li>• <b>Service End Date:</b> The date the vendor will end the work according to the statement of work</li> <li>• <b>Service Amount:</b> Total amount of the service</li> </ul>  <p>The '4. Service Details*' form contains several fields highlighted with red boxes: 'Summary of Service' (a large text area with '1000 characters remaining' and 'expand   clear' links), 'Service Start Date' (a date picker with 'mm/dd/yyyy' format), 'Service End Date' (a date picker with 'mm/dd/yyyy' format), and 'Service Amount' (a text input field). Below these is a 'Description' field with '254 characters remaining' and 'expand   clear' links.</p>
9	<p>Enter the <b>Vendor Information</b>. Use the search box to search for existing vendors and select the matching vendor.</p>

	<div><div><div>Vendor Information*</div><div><div>Steps</div><div><div>1. Using the search box, enter the vendor name for the non-catalog order.</div><div>2. If the vendor is found, select the matching vendor.</div></div></div><div><div>Search Existing Vendors</div><div><div><div></div></div><div>or</div><div><a href="#">Search Existing Vendors</a></div></div></div></div></div> <div>If the vendor information is not in Hilltop Shop, users are required to submit the “<b>New Vendor Request by USF Shopper</b>” form. The form is available in the Quick Links box at the shopping home page</div>
10	<div>By selecting <b>Search Existing Vendors</b>, a new page should appear. Type the vendor name into the search box then click on <b>Select next</b> to the first address in the list.</div> <div><div><div>Vendor Search</div><div><div>Vendor</div><div><div>Promotional Edge</div><div>Q</div></div></div><div><div>Results Per Page 20</div><div>Vendors found: 1</div><div>Page 1 of 1</div></div><div><div>Vendor Name/Address</div><div>Select</div></div><div><div>Promotional Edge</div><div>PO Purchase Orders 1: 2007 Hill Meadow Pl Danville, CA 94526-4448 US</div><div>Select</div></div></div></div>
11	<div>Once the form is completed, scroll up to the top of the page and click on the drop down menu next to <b>Available Actions</b> in the upper right-hand corner. Select <b>Add and Go To Cart</b> and press the <b>Go</b> button.</div> <div><div><div>Services Request</div><div>Available Actions: <div><div>Add and go to Active Cart</div><div>Go</div><div>Close</div></div></div><div><div>Form Instructions</div></div></div></div>
12	<div>The services form should now appear in your active shopping cart.</div>

	
13	<p>Click on the text box next to <b>Name This Cart</b> and enter a name for the cart that will be more meaningful to you and any Requestor or Approvers who will need to review your order.</p> 
14	<p><b>Optional:</b> Users can update the <b>UNSPSC Commodity Code</b> for each line item created from the non-catalog form. Click on the magnifying glass icon for each line item to add the appropriate commodity code</p> <div data-bbox="212 1283 342 1415"> <p><b>Helpful Tips</b></p> </div> <p>The UNSPSC Commodity Code <b>is not required</b> to submit the form. Purchasing &amp; Ancillary Services (PaAS) will assign the proper UNSPSC Commodity Code that matches the items or services ordered</p>

	 <p>The screenshot shows a shopping cart interface. At the top, it says 'Shopping Cart for Robin Requestor'. Below that, there's a field 'Name this cart:' with the value 'Promotional Services'. To the right, it shows '1 Item(s) for a total of 600.00 USD', with a subtotal of 600.00 USD and estimated tax, shipping &amp; handling of 0.00 USD. There are buttons for 'Proceed to Checkout' and 'Assign Cart'. Below this, there's a section for 'Promotional Edge' with a table of items. The table has columns for 'Product Description', 'Unit Price', 'Quantity', and 'Total'. One item is listed: 'Services Request' with a unit price of 600.00 USD and a quantity of 1, totaling 600.00 USD. There are also buttons for 'Update', 'More Actions', and a search field for the 'Commodity Code'.</p>
15	<p><b>Optional:</b> Search for the UNSPSC Commodity Code by <b>Code starts with</b> or <b>Description contains</b> and click <b>Search</b>.</p>  <p>The screenshot shows a 'Commodity Code Search' form. It has two input fields: 'Code starts with...' and 'Description contains...'. Below these fields is a red-bordered button labeled 'Search'.</p> <p>After finding the correct Commodity Code, click <b>Select</b>. Repeat this for each line item in the Shopping Cart</p>  <p>The screenshot shows a table of search results. The table has columns for 'Code' and 'Description'. There are three results listed: '30000000 General Contracting', '27000000 General Maintenance, Tools, and Equipment', and '44100000 General Office Supplies'. Each row has a red-bordered button labeled 'select'.</p>
16	<p>Click the <b>Assign Cart</b> button</p>  <p>The screenshot shows the shopping cart interface again. The 'Assign Cart' button is highlighted with a red border.</p>
17	<p>Click on the <b>Search for an assignee</b> link.</p>

Assign Cart

Select from profile values

Search for an assignee

Selected Assignee:

Assign Cart To: 

Search for an assignee

Note To Assignee:

Assign

Close

18 Enter either the **Last Name** or **First Name** of the Requestor then click on the **Search** button

User Search

Last Name

requestor

First Name

rachel

User Name

Email

Department

Position

Results Per Page

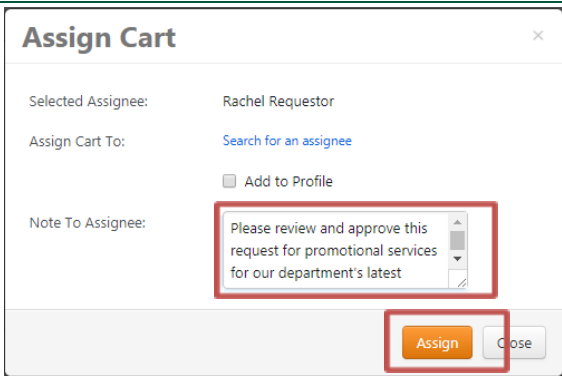
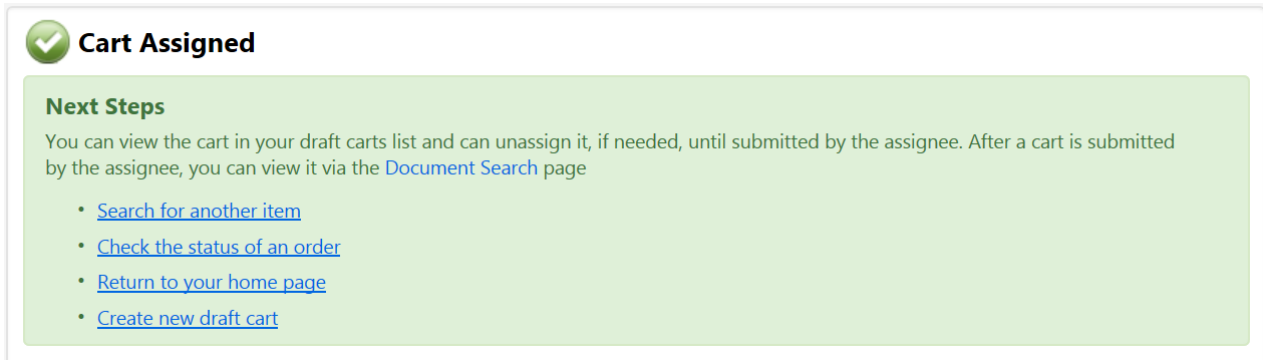
10

Search

19 Find the name of the Requestor in your department and click **Select**.

Name ▲	User Name ▲	Email ▲	Phone	Action
Requestor, Rachel	requestor	msquarebriggs@jaggaer.com		[select]

20 Fill in the **Note to Assignee** field with a brief description of the order then click on the **Assign** button.

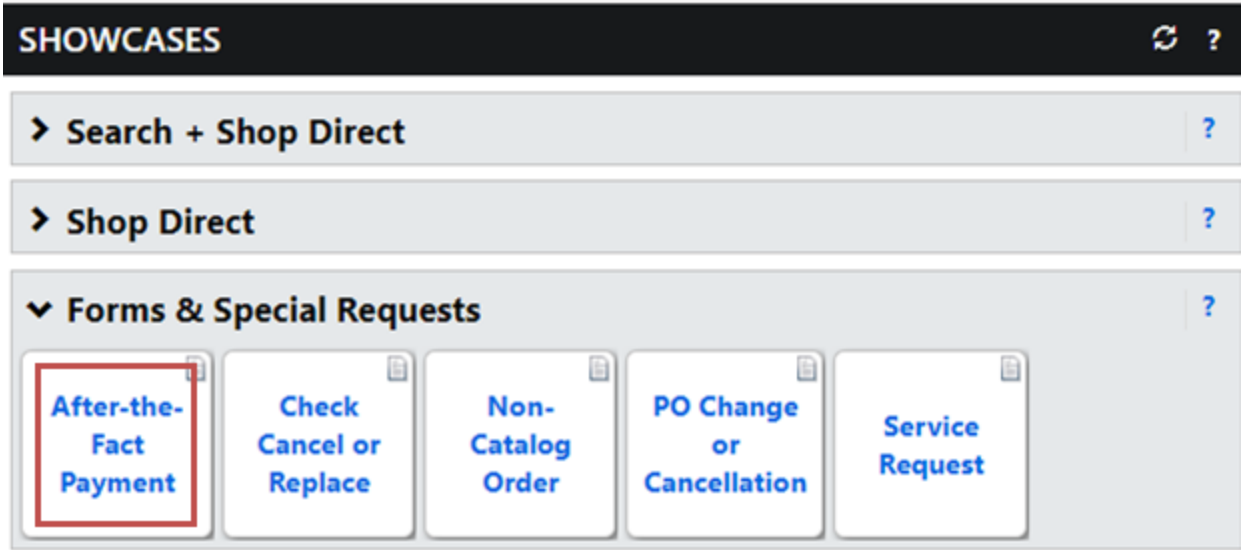
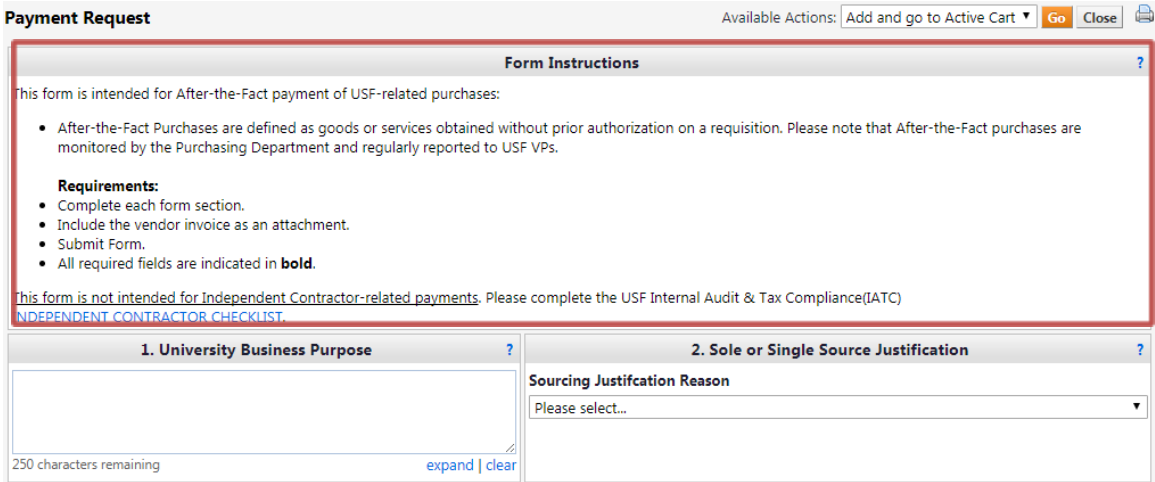
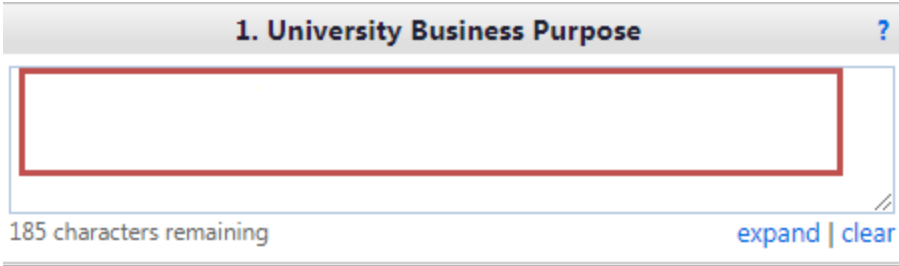
	 <p>The 'Assign Cart' dialog box shows the 'Selected Assignee' as Rachel Requestor. The 'Assign Cart To:' field has a 'Search for an assignee' link. There is an 'Add to Profile' checkbox. The 'Note To Assignee:' field contains the text: 'Please review and approve this request for promotional services for our department's latest'. At the bottom are 'Assign' and 'Close' buttons.</p>
21	<p>System message indicates your cart was successfully assigned</p>  <p>The system message 'Cart Assigned' includes a green checkmark icon. Under 'Next Steps', it states: 'You can view the cart in your draft carts list and can unassign it, if needed, until submitted by the assignee. After a cart is submitted by the assignee, you can view it via the <a href="#">Document Search</a> page'. Below this are four links: <a href="#">Search for another item</a>, <a href="#">Check the status of an order</a>, <a href="#">Return to your home page</a>, and <a href="#">Create new draft cart</a>.</p>

## Exercise 8: After-the-Fact Payment Form

After-the-fact (ATF) purchases are typically invoices a department has received without first creating a Requisition in Hilltop Shop. An ATF is an unapproved obligation to purchase goods or services and is a temporary allowable process to help Departments transition from historic processes to Hilltop Shop and to ensure timely payment of outstanding invoices. Paying invoices in this manner is discouraged and departments should first create a requisition.

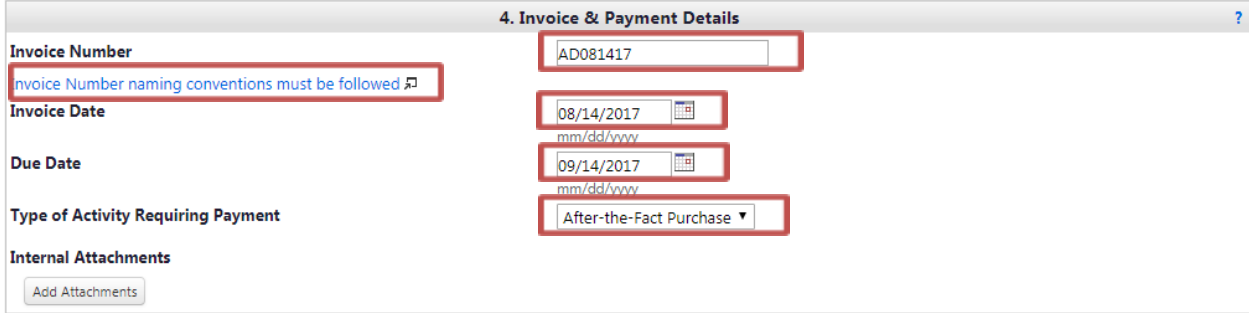
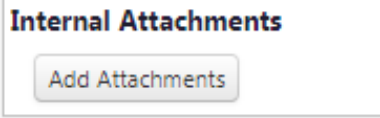
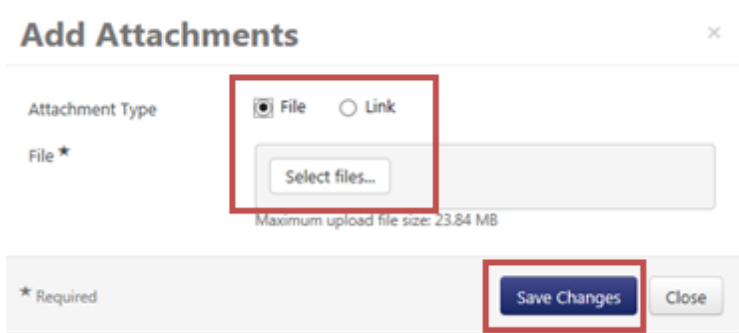
In the spirit of the Procurement Policy, purchases should be encumbered and approved within Hilltop Shop prior to placing the order for goods and services. The approval of a requisition, resulting in a purchase order sent to the supplier, is required prior to purchasing goods or services from suppliers.

Step	Description
1	Login to Hilltop Shop using the username and password provided to you for training. In production, Hilltop Shop is accessed through myUSF using your username and password.
2	From the homepage, navigate to the <b>Forms</b> section, located under <b>Showcases</b> . Click on <b>After-the-Fact Payment</b> sticker.

	
3	<p>The After-the-Fact Payment form will open. Please read the <b>Form Instructions</b> at the top of the screen before filling out the form.</p> 
4	<p>Complete the <b>University Business Purpose</b> section by typing the purpose of the purchase (Note: this is a required section)</p> 



5	<p>Please complete the <b>Sole Source Justification</b> if competitive quotes are not attached to orders \$5k and over. Please consult USF Procurement Policy for guidance. Formal Sourcing Events (RFx) are required for purchases \$50,000 or greater. Use the drop down box to select a <b>Justification Reason</b>.</p> <div data-bbox="191 373 1328 741"> <p><b>2. Sole or Single Source Justification</b> ?</p> <p>Sourcing Justification Reason</p> <ol style="list-style-type: none"> <li>1. Sole Source: The product or service is available from only one source.</li> <li>2. Single Source: There is only one vendor qualified to provide the product or services.</li> <li>3. Emergency Order: An unusual or compelling urgency exists.</li> <li>4. The product or service must match or be compatible with current equipment or services.</li> <li>5. The product or service needed is controlled/mandated by USF Policy, local utility or government</li> <li>6. The product or service needed is specifically required for use in conjunction with a grant or con</li> <li>7. Artistic Services</li> <li>8. Capital project expenditure (grant-funded excluded) to meet specific timeline; VP approved</li> </ol> </div>				
6	<p>Enter the <b>Vendor Information</b>. Use the search box to search for existing vendors and select the matching vendor.</p> <div data-bbox="191 814 1433 1255"> <p><b>3. Vendor Information</b> ?</p> <p>Perform a vendor search. In a vendor match is found, please select the vendor.</p> <p><b>Search Existing Vendors</b></p> <div data-bbox="727 888 987 972"> <input type="text"/> or <a href="#">Search Existing Vendors</a> </div> <p>If the vendor is NOT found in search results, the vendor is required registered with USF. See instructions below.</p> <p><b>NEW VENDOR PAYMENT PROFILE PROCESS</b></p> <ol style="list-style-type: none"> <li>1. Click on the "NEW VENDOR REQUEST" link below and provide vendor information.</li> <li>2. PAAS will receive the vendor request and invite vendor to complete payment profile.</li> <li>3. Once the vendor has submitted request, the Accounts Payables staff will review &amp; approve for payment only.</li> <li>4. Once notified by Accounts Payable, please return to this <i>After-the-Fact Payment Form</i>, search for vendor, complete and submit your request for payment.</li> </ol> <p><b>NOTE:</b> Vendors must formally register with USF after 2 payments through the use of this form. Payment may be withheld until vendor formally registers. As needed, refer to <a href="#">USF Purchasing Policy</a>.</p> <p>\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\ - NEW VENDOR REQUEST - \\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\ \\\\</p> </div>				
7	<p>By selecting <b>Search Existing Vendors</b>, a new page should appear. Type the vendor name into the search box then click on <b>Select next</b> to the first address in the list.</p> <div data-bbox="191 1360 1149 1623"> <p><b>Vendor Search</b> ?</p> <p>Vendor <input type="text" value="Promotional Edge"/> <input type="button" value="Q"/></p> <p>Results Per Page 20 Vendors found: 1 Page 1 of 1 ?</p> <table border="1"> <thead> <tr> <th>Vendor Name/Address</th> <th>Select</th> </tr> </thead> <tbody> <tr> <td><b>Promotional Edge</b> PO Purchase Orders 1: 2007 Hill Meadow Pl Danville, CA 94526-4448 US</td> <td><input type="button" value="Select"/></td> </tr> </tbody> </table> </div>	Vendor Name/Address	Select	<b>Promotional Edge</b> PO Purchase Orders 1: 2007 Hill Meadow Pl Danville, CA 94526-4448 US	<input type="button" value="Select"/>
Vendor Name/Address	Select				
<b>Promotional Edge</b> PO Purchase Orders 1: 2007 Hill Meadow Pl Danville, CA 94526-4448 US	<input type="button" value="Select"/>				
8	<p>Complete the <b>Invoice &amp; Payment Details</b> section with the specific details of the payment including:</p> <ul style="list-style-type: none"> <li>• <b>Invoice Number:</b> If the vendor has provided an Invoice Number, enter it into the text box. If the vendor has not provided a number, use the link to take you to a guide that will provide invoice numbering conventions</li> <li>• <b>Invoice Date:</b> The date the vendor issued the invoice</li> <li>• <b>Due Date:</b> The date the payment is due to the vendor</li> </ul>				

	<ul style="list-style-type: none"> <li>• <b>Type of Activity Requiring Payment:</b> Dropdown list of the type of activity or service being paid</li> </ul> 
9	<p>Click the <b>Add Attachments</b> to provide a copy of the vendor’s invoice, quotes, and supplemental information. <b>Internal Attachments</b> will remain internal in Hilltop Shop and are <b>only</b> viewable to USF employees and should include:</p> <ul style="list-style-type: none"> <li>▪ <b>Vendor invoice</b></li> <li>▪ Quotes provided by the vendor</li> <li>▪ Internal USF information that is important for approvers to access</li> </ul> <p><b>Internal Attachments</b></p> 
10	<p>Attachments can be added by selecting a file from your computer or by entering a link to a website. Click <b>Save Changes</b>.</p> 
11	<p>Complete the <b>Invoice Line Items</b> section with the <b>Description, Price, and Quantity</b> for each line item found on the vendor’s invoice.</p>

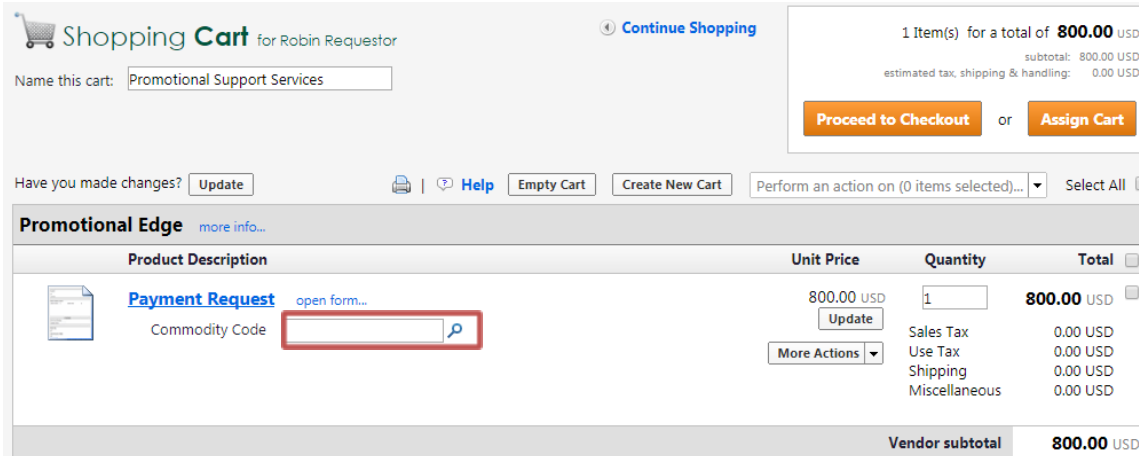
Invoice Line Items

Description	Price	Quantity	Ext. Price
3' x 3' Custom Print Posters	20	10	0.00
Poster Design Services	1	500	0.00
Delivery	1	100	0.00
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- 15 **Optional:** Users can update the **UNSPSC Commodity Code** for each line item created from the form. Click on the magnifying glass icon for each line item to add the appropriate commodity code



The UNSPSC Commodity Code is **not required** to submit the form. Purchasing & Ancillary Services (PaAS) will assign the proper UNSPSC Commodity Code that matches the items or services ordered



Shopping Cart for Robin Requestor

Name this cart: Promotional Support Services

1 Item(s) for a total of **800.00** USD  
 subtotal: 800.00 USD  
 estimated tax, shipping & handling: 0.00 USD

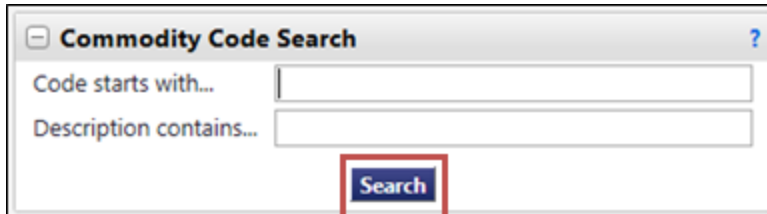
**Proceed to Checkout** or **Assign Cart**

Have you made changes? [Update](#) [Help](#) [Empty Cart](#) [Create New Cart](#) Perform an action on (0 items selected)... [Select All](#)

**Promotional Edge** [more info...](#)

Product Description	Unit Price	Quantity	Total
<a href="#">Payment Request</a> <a href="#">open form...</a> Commodity Code <input type="text"/> <input type="button" value="magnifying glass"/>	800.00 USD	1	800.00 USD
			Sales Tax 0.00 USD
			Use Tax 0.00 USD
			Shipping 0.00 USD
			Miscellaneous 0.00 USD
<b>Vendor subtotal</b>			<b>800.00</b> USD

- 16 **Optional:** Search for the UNSPSC Commodity Code by **Code starts with** or **Description contains** and click **Search**.



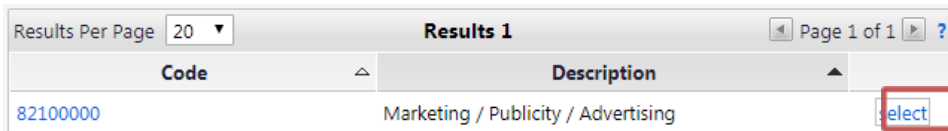
**Commodity Code Search** ?

Code starts with...

Description contains...

**Search**

After finding the correct Commodity Code, click **Select**. Repeat this for each line item in the Shopping Cart




Results Per Page: 20 **Results 1** Page 1 of 1 ?

Code	Description
82100000	Marketing / Publicity / Advertising

**select**

- 17 Click the **Assign Cart** button



Shopping Cart for Robin Requestor

Name this cart: Promotional Support Services

1 Item(s) for a total of **800.00** USD  
 subtotal: 800.00 USD  
 estimated tax, shipping & handling: 0.00 USD

**Proceed to Checkout** or **Assign Cart**

- 18 Click on the **Search for an assignee** link.

Assign Cart

×

Selected Assignee:

-

Assign Cart To:

Search for an assignee

Note To Assignee:

Assign

Close

19

Enter either the **Last Name** or **First Name** of the Requestor then click on the **Search** button

User Search

Last Name

requestor

First Name

rachel

User Name

Email

Department

Position

Results Per Page

10

Search

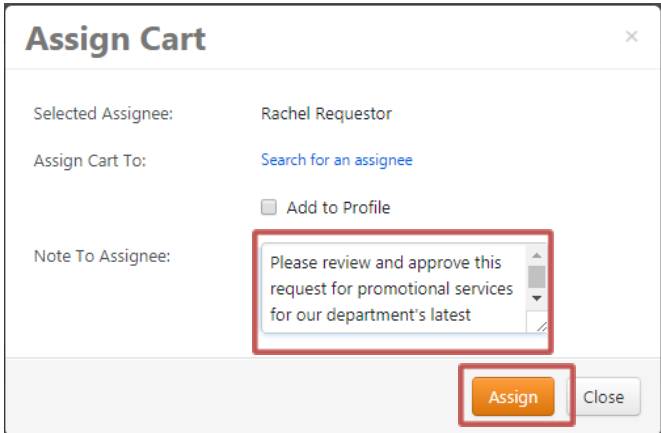
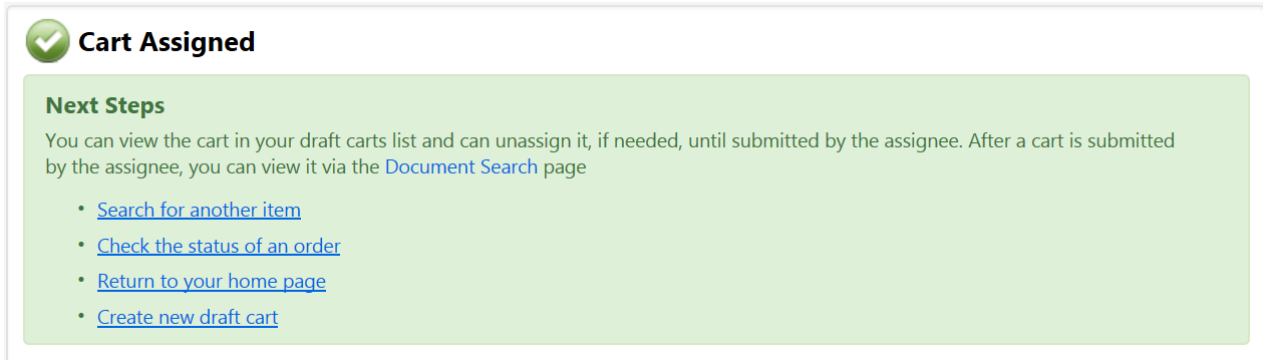
20

Find the name of the Requestor in your department and click **Select**.

Name ▲	User Name ▲	Email ▲	Phone	Action
Requestor, Rachel	requestor	msquarebriggs@jaggaer.com		<div>[select]</div>

21

Fill in the **Note to Assignee** field with a brief description of the order then click on the **Assign** button.

	
22	<p>System message indicates your cart was successfully assigned</p> 

## Document Search

Document Search allows end users to find documents such as requisitions, purchase orders, receipts, and invoices created in Hilltop Shop. All end users will be able to access and view documents he/she created and/or approved along with all related documents such as POs, Receipts, and Invoices. For instance, if a Shopper creates a cart that is ultimately submitted as a requisition by a Requestor, the Shopper will be able to view the requisition and any documents created later in the process that is associated with that requisition including the PO, Receipt, and Invoice. Additionally, certain types of end users are granted permissions, based on their Hilltop Shop role, to view documents outside of those they have created.

**Shoppers:** View any carts or requisitions they created (e.g., assigned a draft shopping cart)  
**Requestors & Approvers:** View orders they submitted or approved, as well as orders within their department

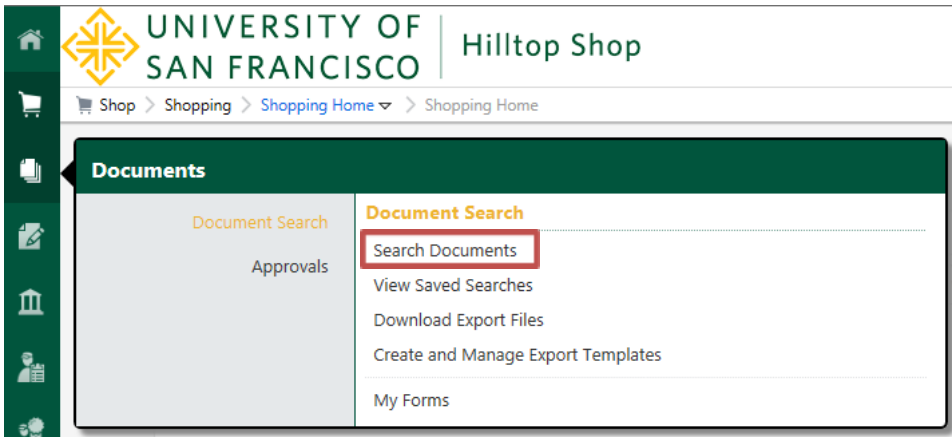
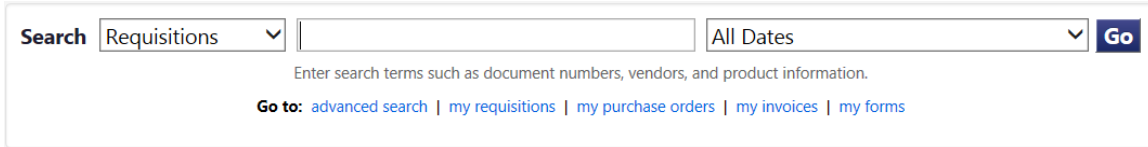
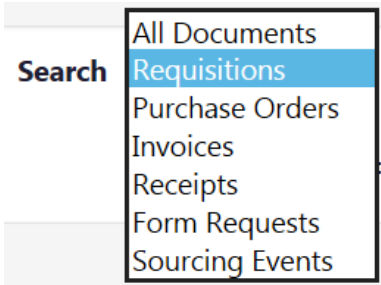
In this set of exercises, you will learn how to utilize Hilltop Shop's Document Search capabilities including the Simple Search, Advanced Search, and Saving Search Results.

In this section of the course, you learn to perform the following:

- Exercise 9: Simple Search

- Exercise 10: Advanced
- Exercise 11: Saving Search Results

## Exercise 9: Simple Search

Step	Description
1	Login to Hilltop Shop using the username and password provided to you for training. In production, Hilltop Shop is accessed through myUSF using your username and password.
2	<p>From the Hilltop Shop home page, go to the navigation menu located on the left, click <b>Documents</b> &gt; <b>Document Search</b> &gt; <b>Search Documents</b>.</p> 
3	<p>Upon your first visit, you will see the <b>Simple Search</b> menu. <b>Simple Search</b> allows end users to enter a keyword, document type, and date range to search for documents such as requisitions, purchase orders, receipts, and invoices.</p> 
4	<p>Under the document types drop down menu, you can select the type of document you want to limit your search to or select <b>All Documents</b></p> 
5	Under the <b>Dates</b> drop down menu, you can select from various date range options to help limit your search results.

Search

Requisitions

Enter search terms such as document numbers, vendors,

Go to: [advanced search](#) | [my requisitions](#) | [my purchase or](#)

All Dates

All Dates

Other

Custom Date Range

Days

Last 7 days

Last 30 days

Last 60 days

Last 90 days

Last 120 days

Yesterday

Today

Last Week

This Week

Calendar

Month-To-Date

Last Month

Year-To-Date

Previous Year

Fiscal

Fiscal Year-To-Date

6 Enter your desired criteria and click on the **Go** button

Search

Requisitions

Office Depot

Last 30 days

Go

Enter search terms such as document numbers, vendors, and product information.

Go to: [advanced search](#) | [my requisitions](#) | [my purchase orders](#) | [my invoices](#) | [my forms](#)

7 The search results will appear with document information including the Requisition/PO/Invoice number, supplier, creation date, settlement status, and total amount.


Showing **1 - 1** of 1 Results **All Dates**

Results Per Page 

20

Sort by: Best match

Page 1 of 1 ?

Requisition No.	Vendor(s)	Requisition Name	Requisitioner	Requisition Date/Time	Requisition Total
 <b>1884659</b>	Office Depot Inc	2017-06-09 juser 01	Joe User	6/14/2017 5:36 PM	1,000.00 USD

8 To open and view the details for a document, click on the document number under the first column


Showing **1 - 1** of 1 Results **All Dates**

Results Per Page 

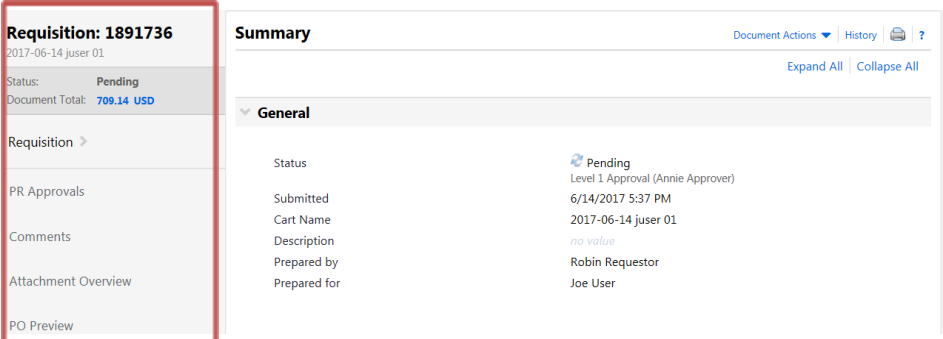
20

Sort by: Best match

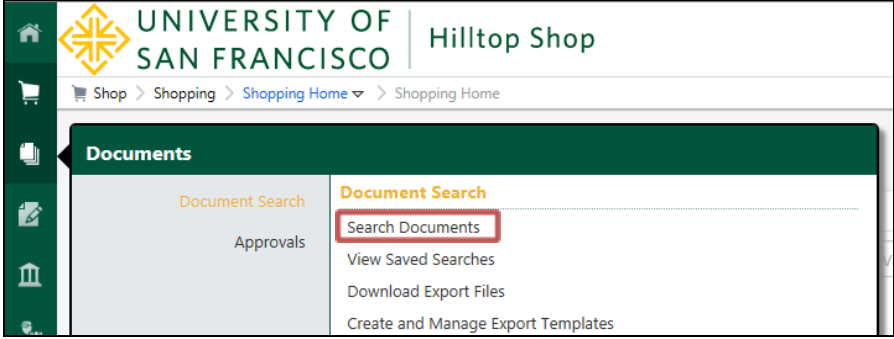
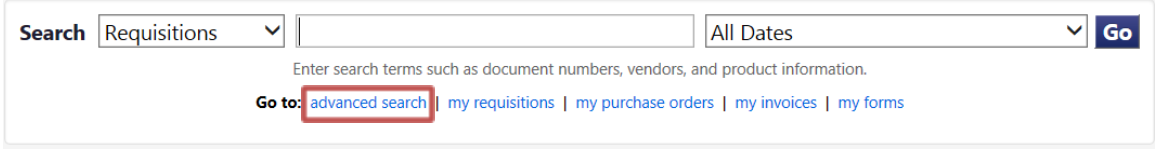
Page 1 of 1 ?

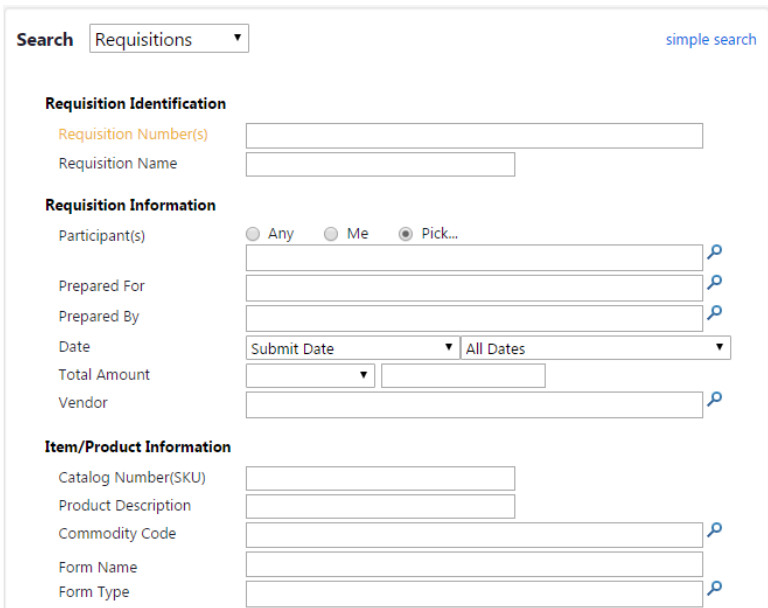
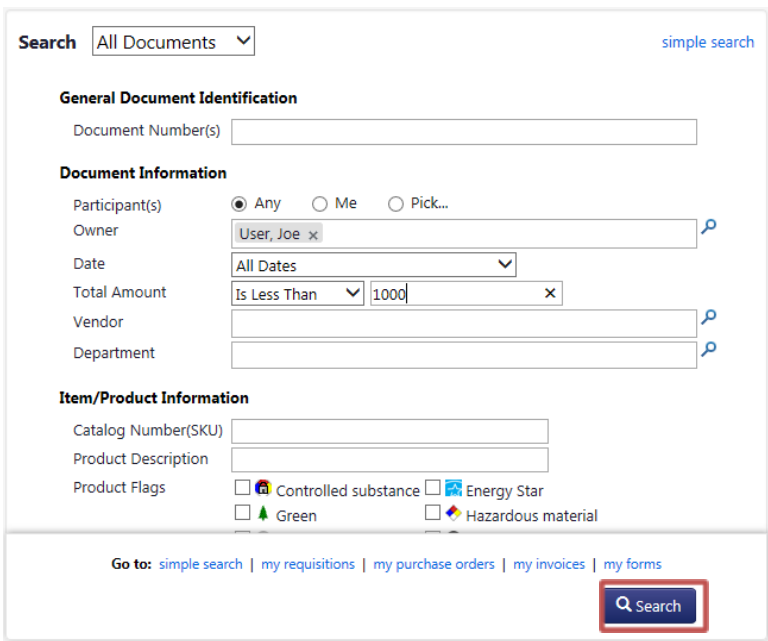
Requisition No.	Vendor(s)	Requisition Name	Requisitioner	Requisition Date/Time	Requisition Total
 <b>1884659</b>	Office Depot Inc	2017-06-09 juser 01	Joe User	6/14/2017 5:36 PM	1,000.00 USD



9	<p>Document information such as order status, submission date, cart name, document history will appear. Additional document information can be viewed by navigating through the left menu bar</p> 
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## Exercise 10: Advanced Search







Step	Description
1	Login to Hilltop Shop using the username and password provided to you for training. In production, Hilltop Shop is accessed through myUSF using your username and password.
2	<p>From the Hilltop Shop home page, go to the navigation menu located on the left, click <b>Documents</b> &gt; <b>Document Search</b> &gt; <b>Search Documents</b>.</p> 
3	<p>To conduct an Advanced Search select the <b>Advanced Search</b> link below the search bar.</p> 
4	Advanced search allows you to enter multiple data points to refine your search criteria including, but not limited to: document owner, data ranges, amount ranges, and accounting information. Also changing the document type will update the fields available for searching for a given type of document.

	
5	<p>Enter the search criteria in the text fields such as document number, document information, and product information. Once you have entered your data element(s), click <b>Search</b> to execute the search.</p> 
6	<p>The document results should appear, including clickable links to further investigate each document. Click the <b>document number</b> for more details.</p> <p><i>Note: Depending on your role and department in Hilltop Shop, visibility to transactions and certain results may be limited.</i></p>

Showing **1 - 3** of 3 Results



All Dates

Results Per Page **20** ▼ Sort by: **Best match** ▼ ◀ Page 1 of 1 ▶ ?

Document Number	Document Type	Document Owner	Document Date/Time	Vendor	Document Total
 <b>1891736</b> 	Requisitions	Joe User	6/14/2017 5:37 PM	Dell	709.14 USD
 <b>1884847</b> 	Requisitions	Joe User	6/14/2017 4:49 PM	Promotional Edge	639.50 USD
 <b>1891785</b> 	Requisitions	Joe User	6/14/2017 9:07 AM	Promotional Edge	0.00 USD

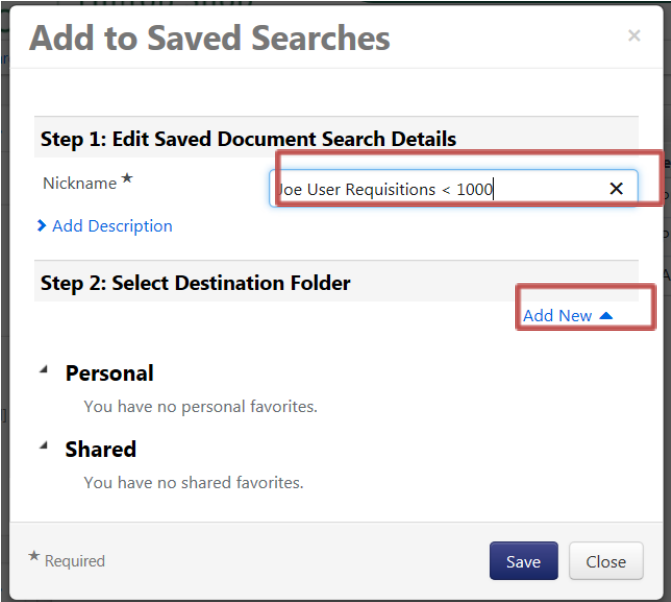
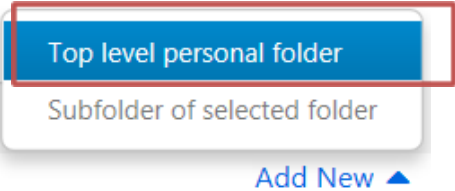
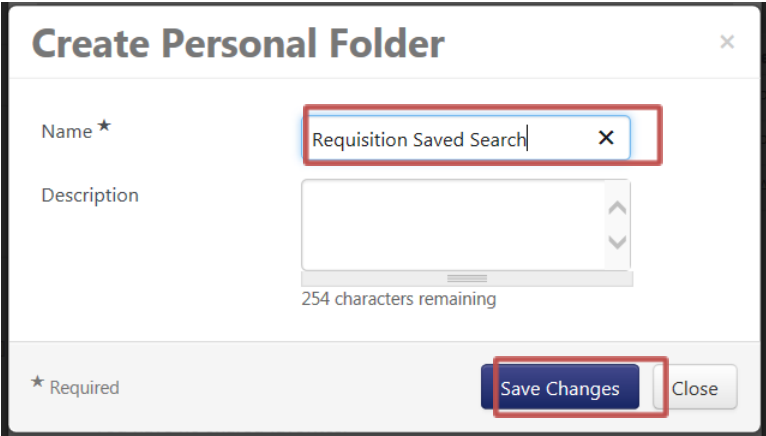
7

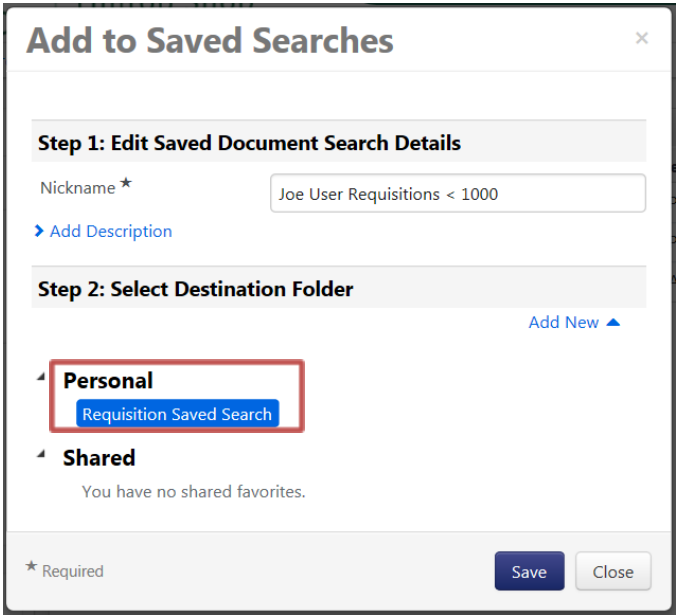
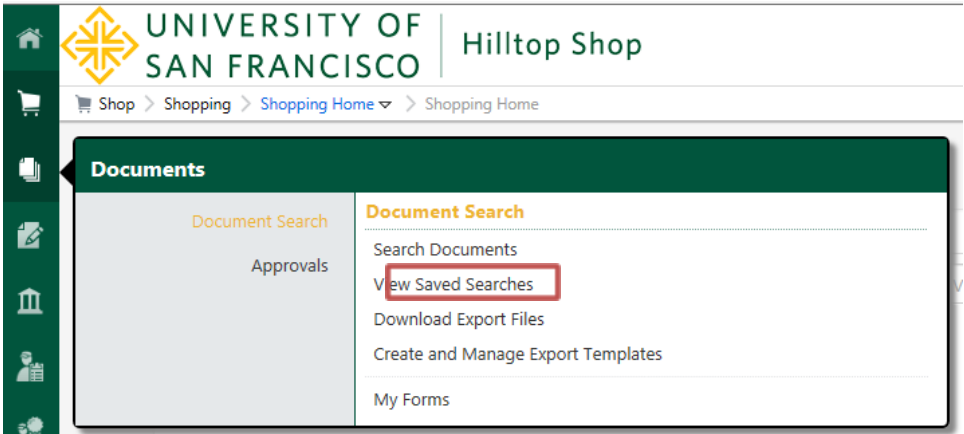
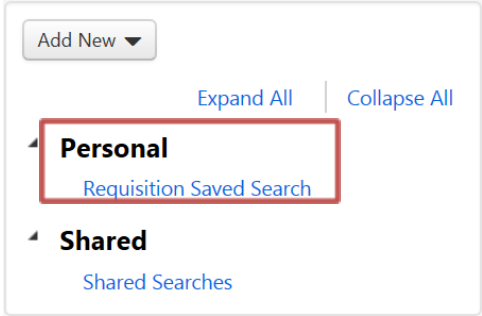
Document information such as order status, submission date, cart name, document history will appear. Additional document information can be viewed by navigating through the left menu bar.

<b>Requisition: 1891736</b> 2017-06-14 juser 01 Status: Pending Document Total: <b>709.14 USD</b> Requisition > PR Approvals Comments Attachment Overview PC Preview	<div> <div> Document Actions <span>▼</span> History  <span>?</span> </div> <div> Expand All Collapse All </div> </div> <div> <div>General</div> <div> <div>Status</div> <div>  Pending  Level 1 Approval (Annie Approver)  6/14/2017 5:37 PM  2017-06-14 juser 01  no value  Robin Requestor  Joe User </div> </div> </div>
--	---

## Exercise 11: Saving Search Results

Step	Description
1	<p>Search results can be saved for future access or exported for further analysis and sharing. This functionality resides on the left of the screen above the filter menu. To save your search, click <b>Save New Search</b>.</p> <div> <p>Search Details <span>?</span></p> <p>Search Terms</p> <p><b>Total Amount</b></p> <p>Is Less Than: 1000 USD</p> <p>Filtered by</p> <p>Type: <span>All Documents</span></p> <p>Date Range: All Dates <span>[remove all]</span></p> <p><b>Owner</b></p> <p><input checked="" type="checkbox"/> Joe User</p> <p><span>Save New Search</span> <span>Export Search</span></p> </div>
2	<p>An add to Saved Search dialogue box will appear. Enter a name for the Saved Search and select a destination folder for the search as well. If there are no personal or shared folders available, select the Add New link to create a folder.</p>

	
3	<p>Choose a folder structure (personal or shared folder), and a dialogue box will appear.</p> <ul style="list-style-type: none"> <li>• <b>Personal Folder</b> saves favorite searches that are only visible to just your user account</li> <li>• <b>Shared Folder</b> saves favorite searches that can be shared with other users</li> </ul> 
4	<p>Enter a name for your personal folder and select <b>Save Changes</b>.</p> 
5	<p>The nickname of the Saved Search as well as the Destination Folder should now appear in the Saved Searches dialogue box, click <b>Save</b>.</p>

	
6	<p>To access your Saved Search return to the Hilltop Shop navigation menu: <b>Documents &gt; Document Search &gt; View Saved Searches</b></p> 
7	<p>Once you have accessed the View Saved Searches menu, your Saved Searches will appear on the left of the screen.</p> 
8	<p>After selecting the desired Saved Search, several options will appear.</p>

- Clicking **Go** will execute the search and provide the document results.
- **Export** will allow you to export the data to further analysis or sharing.
- **Add Shortcut** deposits the saved searches under your Document Search menu for quicker access to the search results.

**Requisition Saved Search** Folder Actions ▼ ?

Actions for Selected Favorites ▼

<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Joe User Requisitions &lt; 1000</a>	<input type="checkbox"/>

[Add Shortcut](#) [Export](#) [Go](#)

[Edit](#) | [Move](#) | [Copy](#) | [Delete](#)

## About Training and Support

### Training Resources

Additional training resources including course guides, quick reference guides, and videos are available at <http://XXXXXXXX.com>

### Support

Please contact [eprocurment@usfca.edu](mailto:eprocurment@usfca.edu) if support or additional training is required.