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
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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.

Skills	What participants should be able to do at the end of the training course.
Knowledge	What participants should know and understand at the end of the training course.
Attitudes	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.

	Capabilities/Functions											
Role	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	✓	✓						✓	✓	✓	✓	

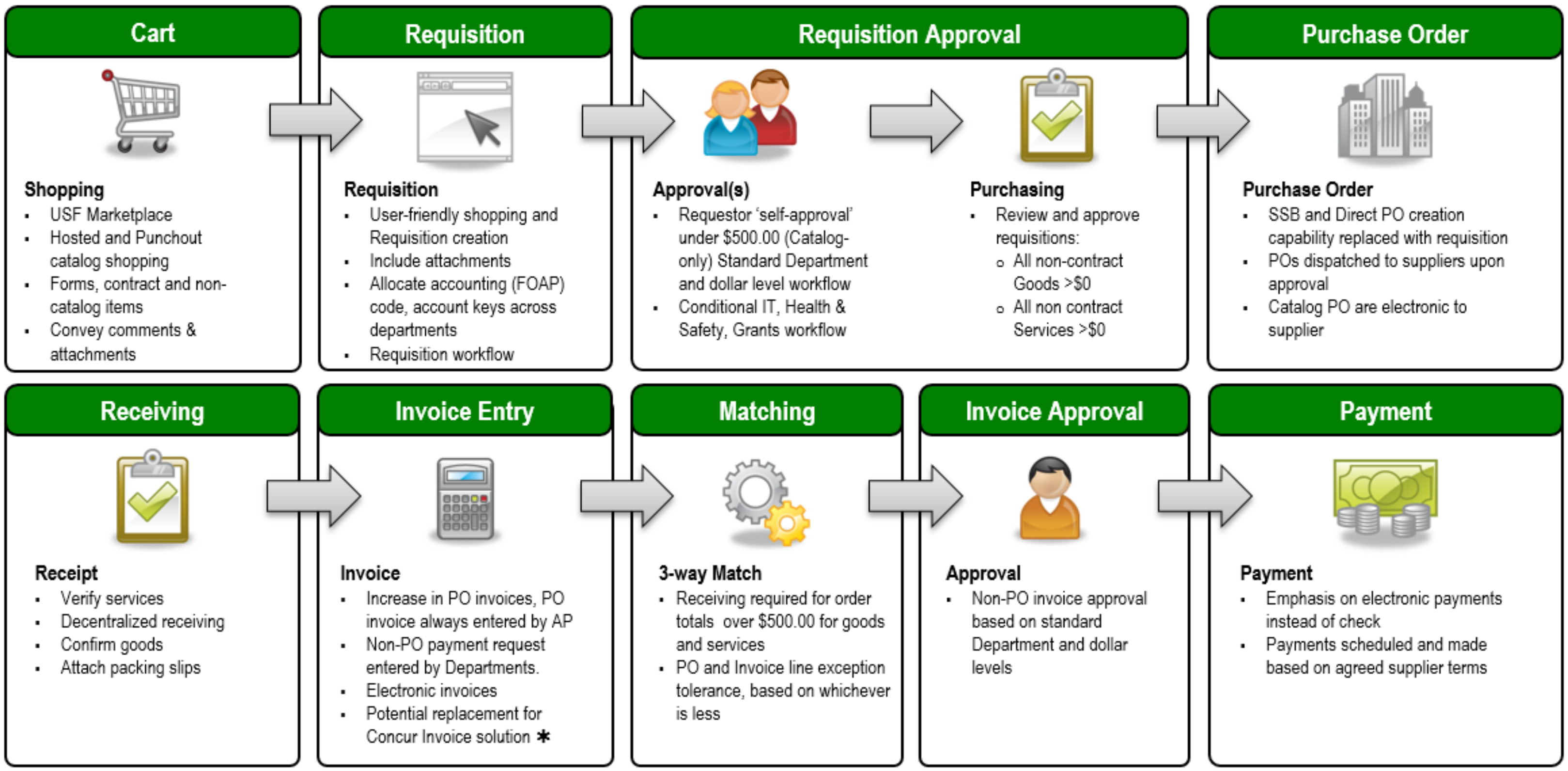
Details

Role	Description
Shopper	• Shop/create carts in Hilltop Shop • Assign Carts to Requestor. (Shopper must know to whom to assign the cart) • On PO greater than $500, confirms Vendor has fulfilled the order by posting the receipt

	• Optional: Can convey comments and funding instructions
Requestor	• Role assigned by Budget Manager - **Please Note**: 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 • Can shop for department up to $500 from a Hosted Catalog or Punch-Out Store without additional department approvals. • Receives assigned/submitted carts from Shoppers • Can return the cart to the Shopper or edit the Cart before submitting into requisition workflow • Must have knowledge of proper chart field use and responsible for proper FOAP assignment • Confirms all requisition information is accurate, complete and complies with policy and funding requirements • On PO greater than $500, confirms Vendor has fulfilled the order by posting the receipt
Approver	• Role assigned based on Banner approval queues - **Please Note**: 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. • Can shop and submit requisitions without assigning carts to Requestor • Review requisitions for compliance and budget availability on unrestricted funds • Confirms requisition information is accurate, complete and complies with the policy and funding requirements • Ability to edit Requisition within workflow • Ability to approve, return, or reject requisition. • On PO greater than $500, posts receipts to authorize payment to vendor
Invoice Approver	• This role is typically the Budget Manager/Director within the Business Unit. • Works with Shoppers and/or Requestors to resolve all match exceptions • When appropriate, works with non-catalog vendors to correct erroneous invoices
Specialty Approver	• Role assigned based on Hilltop Shop workflow rules (not Banner) • Reviews and confirms requisitions for compliance • Ability to edit Requisition within workflow • Ability to approve, return, or reject requisition

	• Assigned based on Jaggaer workflow rules (not Banner) • Role can shop, however Specialty Approvers must assign carts to a Requestor for review
Purchasing Ops	• Submit requisitions that are cross charged across multiple department FOAPs • Confirms requisitions comply with USF Procurement Policy • Approve, return, reject and edit requisitions within workflow • Completes change orders and cancellations requests • Create and manages formal Sourcing Events • Create and manages procurement related contracts and buying agreements • Views Vendor profiles • Vets and approves Vendor registrations
Accounts Payable Ops	• Enter, review and approve vouchers/credit memos • Sets up prepays and recurring payment schedules • Review and approve match exceptions scenarios for tax exceptions and 1099 reporting • Reject/Cancel Invalid Vouchers • Review and approve all after-the-fact payment requests

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 souring 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 **Note**: 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) **Plus**: **For Non-Provost Units:** Assistant or Associate Vice President, Athletic Director **For Provost Units:** Dean and Associate Vice Provost	All purchases greater than $5,000 **Note: Non-Provost Units**: 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) **Plus:** **For Non-Provost Units:** Respective Divisional Vice President **For Provost Units:** 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
Grants Approval	Purchases made against a Grants fund (funds beginning with a "4")
ITS	Purchases made for information technology, including systems, hardware or software purchases
Environmental Health & Safety	Purchases of hazardous materials or chemicals
Furniture	Purchases for furniture, fixtures or equipment (FF&E)
Appliances	Purchases for appliances (i.e., refrigerator, microwave, heater, A/C, etc.)
Branding, Marketing or Advertising	Purchases for marketing collateral, advertising or branding (logo).
Office of the General Counsel (OGC)	Any procurement related contract or agreement (SLA, MSA, etc.)
Sourcing	Purchases > $50,000 requires Formal Sourcing Events (RFx)
Procurement	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
Accounts Payable	After-the-Fact Payment form

Hilltop Shop Exercises

Profile Management

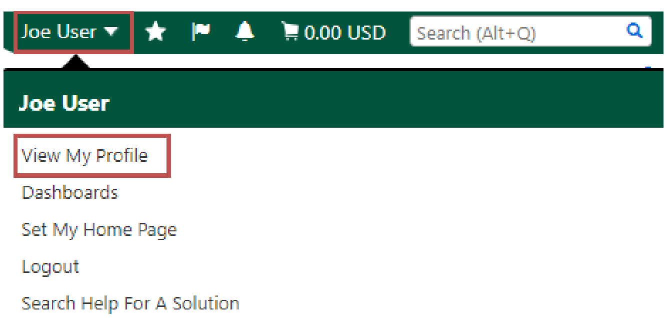
Profiles in Hilltop Shop allow you to make the buying and paying process more efficient by allowing you to save default information such as the shipping address, campus delivery location, cart assignees, notification preferences and email approval options.

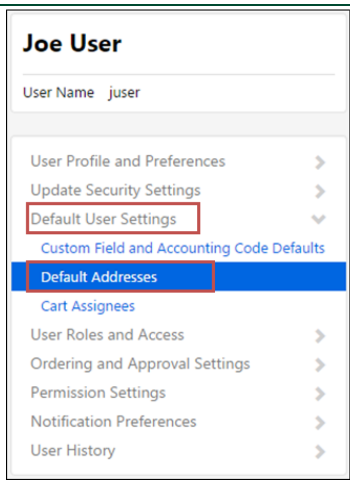
Note: User roles, permissions, order settings as well as approval settings are maintained by System Administrators and cannot be changed without authorization. Please consult with your Budget Manager to update your system controlled settings.

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

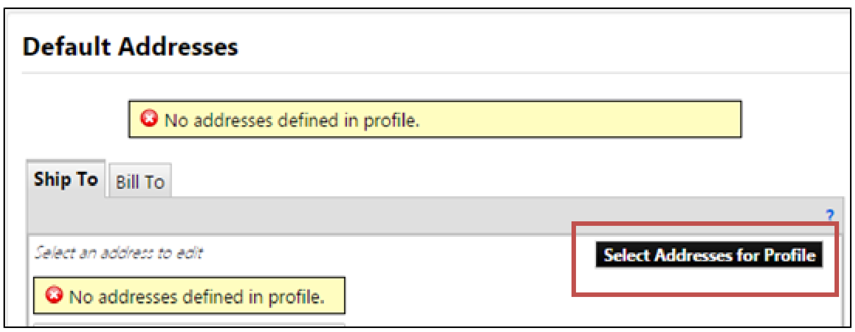
- Exercise 1: Setting Default Shipping Address
- Exercise 2: Setting Favorite Pages

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	From the home page, click your name in the dashboard located on the top right of the page and select **View My Profile** from the menu 
3	Click **Default User Settings** and then **Default Addresses**

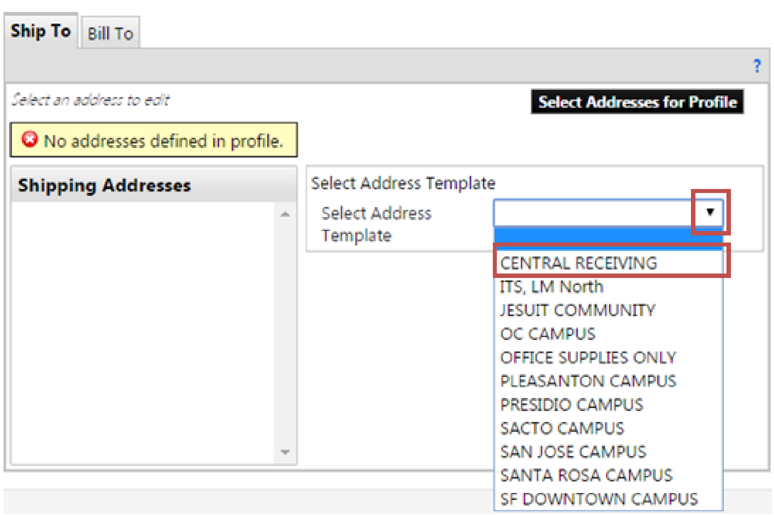


4 Click on the **Select Addresses for Profile** button

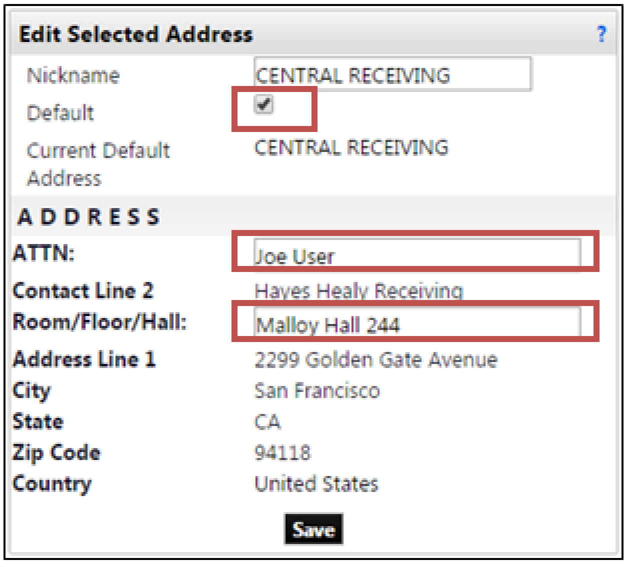


The Bill-To address defaults to the USF-Accounts Payable address. Users may not modify the Bill-To address

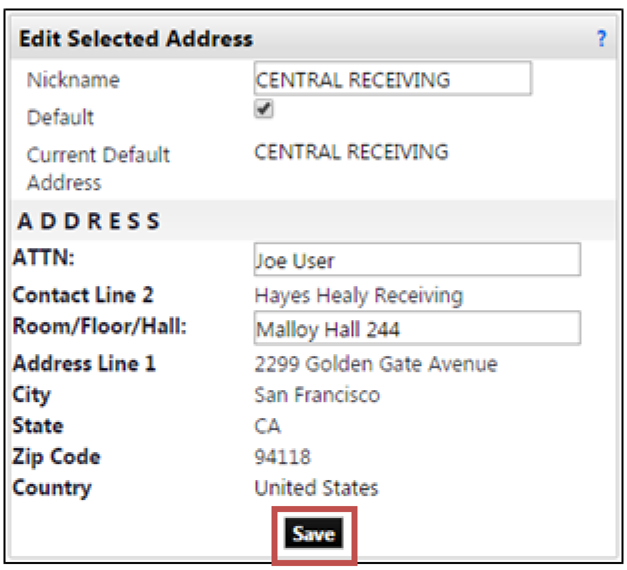
5 Search using the drop down list of approved USF address locations. Once you have identified your preferred delivery address, click on the corresponding address name.



6 Click **Default** in the **Edit Selected Address box**. Enter your name in the **ATTN:** field and your campus delivery location in the **Room/Floor/Hall** field.



7 Click the **Save** button to store the information in your profile.



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.

Exercise 2: Setting Favorite Pages

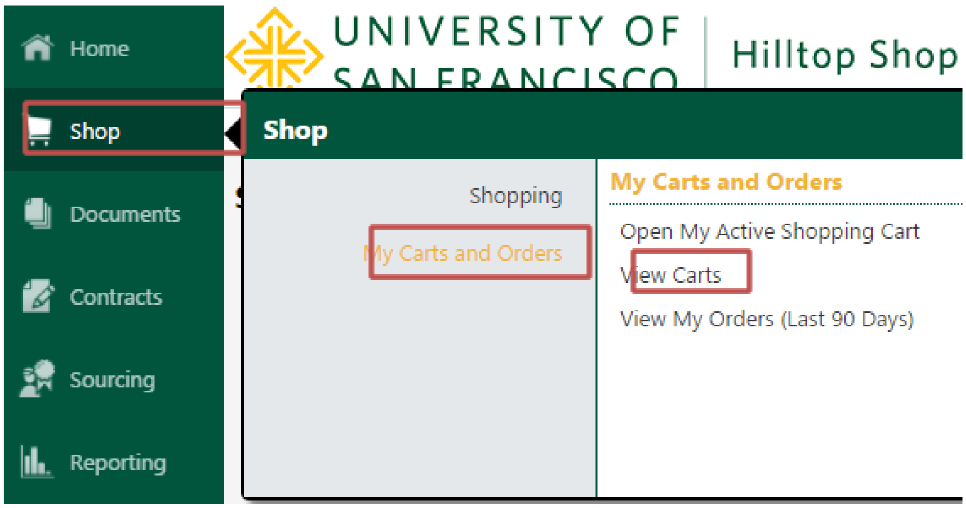
Hilltop Shops allows users to bookmark any page as a Favorite Page. You can quickly access frequently used pages by clicking a bookmarked link instead of scrolling through the navigation bar.

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.

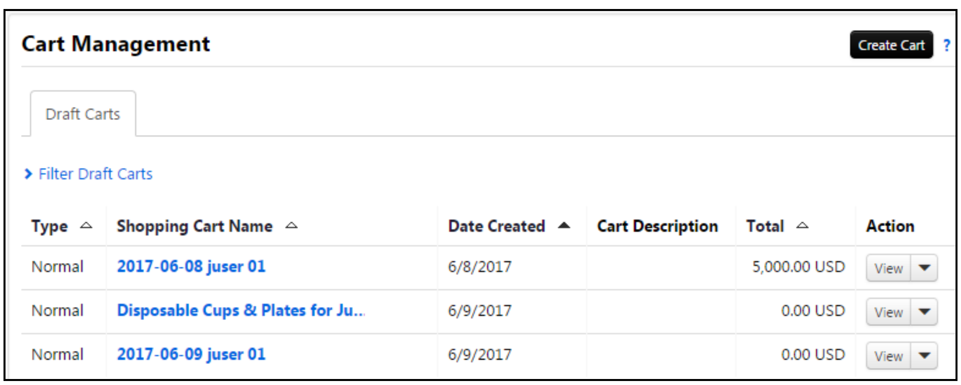
Step	Description

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 From the home page, click on **Shop** from the left side navigation bar. Alternatively, you may use the **Alt + P** shortcut to open the Shop Dialog Box. Click on **My Carts and Orders**. Click on **View Carts**



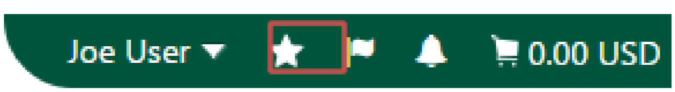
3 The screen will refresh and your draft shopping carts will display.


Cart Management
Create Cart ?
Draft Carts
> Filter Draft Carts

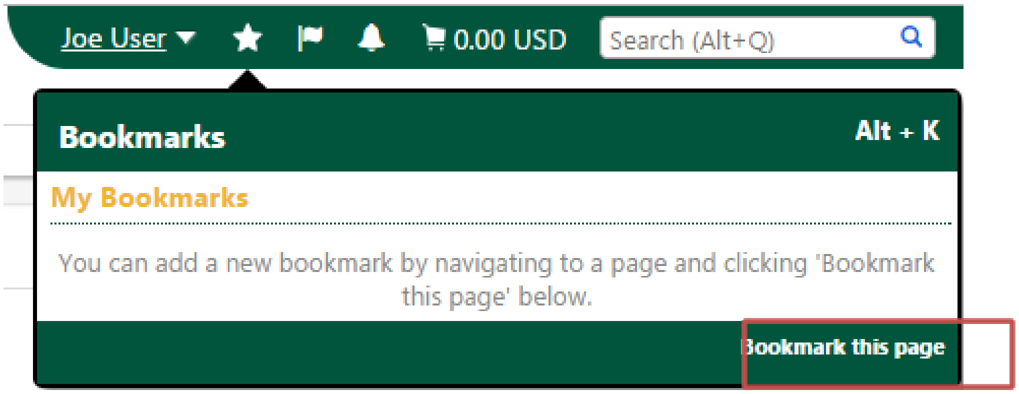
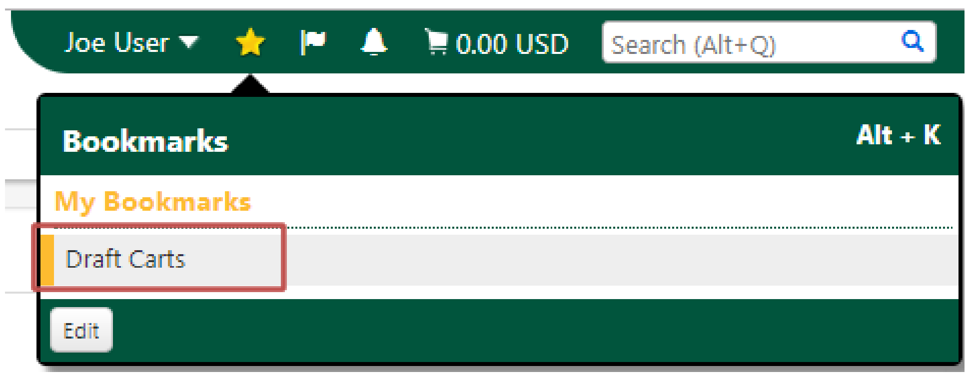
Type	Shopping Cart Name	Date Created	Cart Description	Total	Action
Normal	2017-06-08 juser 01	6/8/2017		5,000.00 USD	View
Normal	Disposable Cups & Plates for Ju..	6/9/2017		0.00 USD	View
Normal	2017-06-09 juser 01	6/9/2017		0.00 USD	View

In the **Action** field, the pull down menu will allow you to **View**, **Activate** or **Delete** your cart.

4 At the top of the screen, click on the **star icon** next you to your name



5 Your **Bookmarks** list will expand. Alternatively, you may use the Alt + K shortcut to open the My Bookmarks Dialog Box. Click on the link to the lower right titled **Bookmark this page**

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

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.

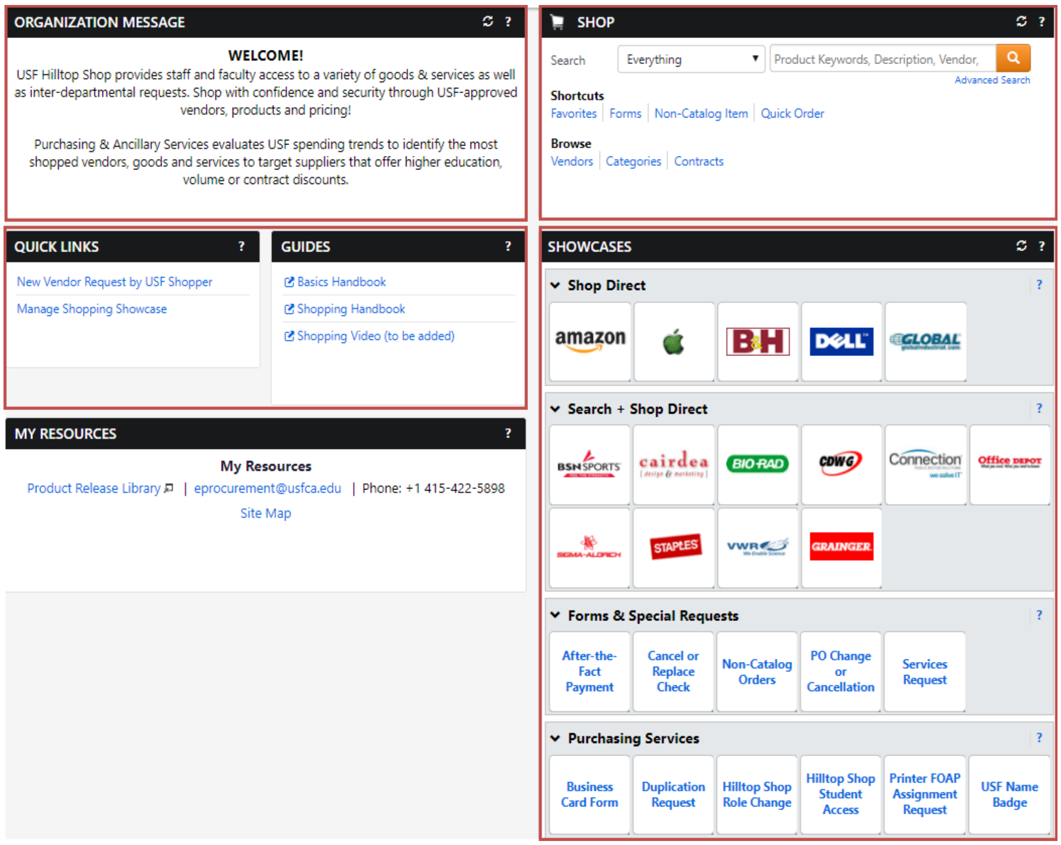
In this set of exercises, you will learn how to shop and submit carts utilizing the available methods in Hilltop Shop including Hosted Catalogs, Punch-out Catalogs, and forms.

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	The shopping homepage is composed of 4 major sections including: **Organization Message - "Shop at the Top" Search Bar - Quick Links - Shopping Showcases**



Step	Description
3	The **Organization Message** will contain announcements from Purchasing and Ancillary Services (PaAs), such as: ▪ New functionality and updates ▪ New Hosted Catalogs, Punch-Out Stores, and Forms ▪ USF Procurement Policy Updates ▪ Planned site outages

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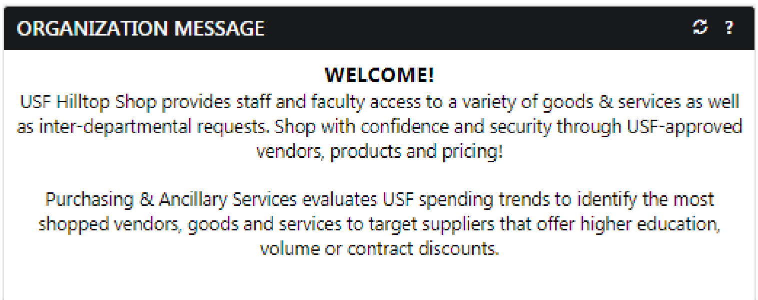

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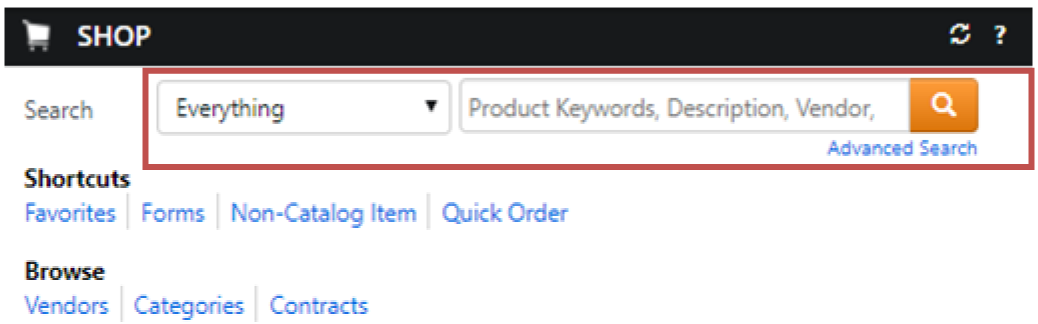
Shop "at the top" allows users to search for products from vendors who are hosting their products directly in Hilltop Shop.



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The **Quick Links** contain shortcuts to commonly used pages as well as links to other sites

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The **Showcases** contain direct links to all Vendor **Hosted Catalogs** and **Punch-out Stores**.

The vendors listed under the **Shop Direct** 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.

The vendors listed under the **Search + Shop Direct** section have opted to post their products directly in Hilltop Shop. This allows users to shop utilizing the **Shop at the Top** 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.

Additionally, the **Showcases** contain links to **Forms** users will need, such as a Non-Catalog Order, After-the-Fact Payment, etc.
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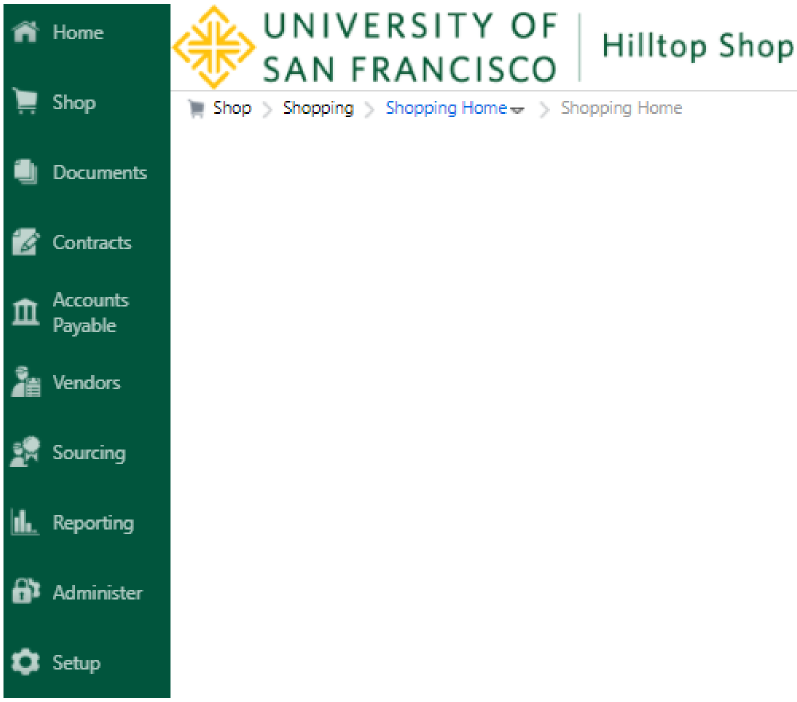
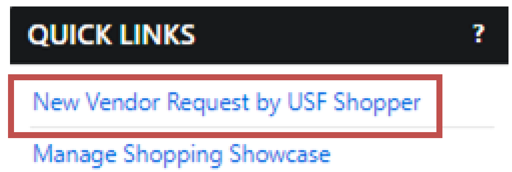
7	In addition to the shopping page, the **left** navigation bar contains links to all other functions a user may perform, including document search, receipt creation, view invoices, and new vendor request by USF Shopper

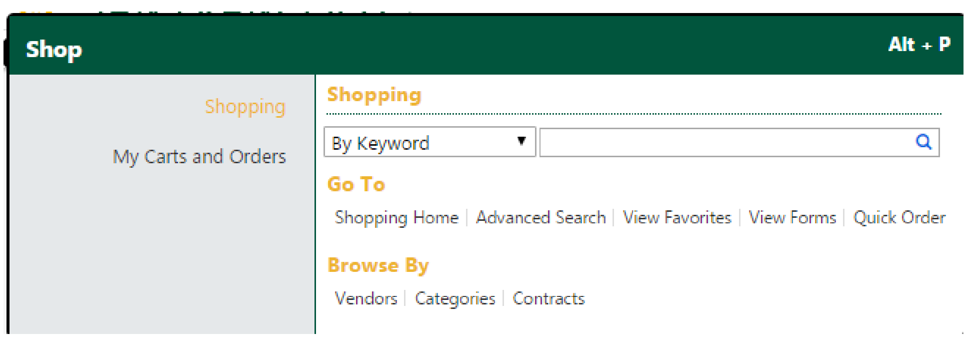


Helpful Tips

Users may access the **New Vendor Request by USF Shopper** through QUICK LINKS on the Shopping Home Page



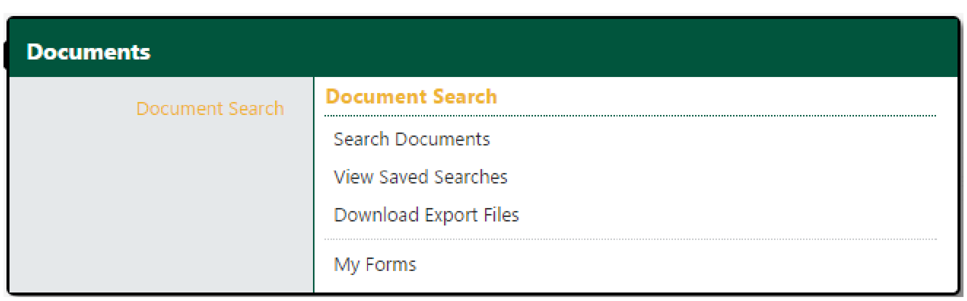
8 **Shop** provides many of the same shopping links as found on the homepage in addition to links to navigate users to a listing of their active, assigned, and historical shopping carts.

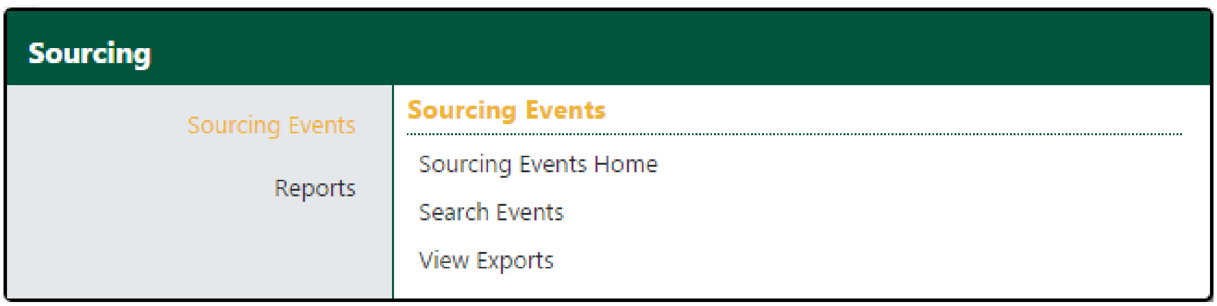


Helpful Tips

Alt + P is the shortcut to open the Shop Dialog Box

9 **Documents** 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.



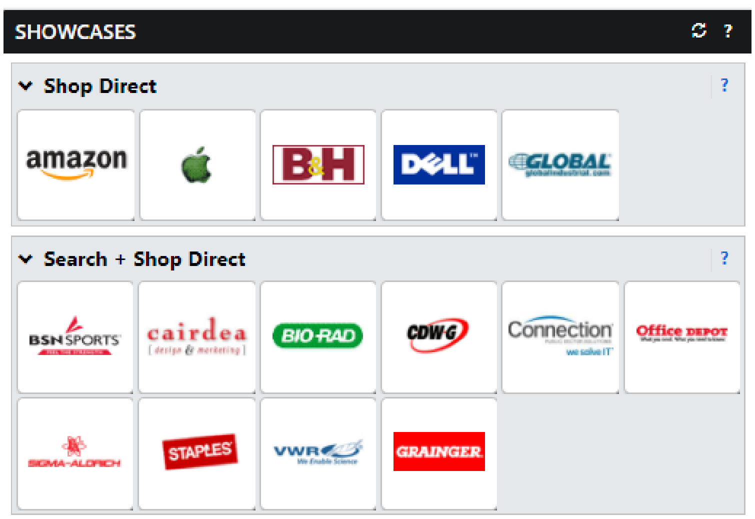
	 You **cannot** search for your draft carts under **Documents**. You may review your carts by following path: **SHOP → My Carts and Orders → View Carts** Alternatively, you may use the **Alt + P** shortcut to open the Shop Dialog Box.
10	**Contracts** allows users to search for Purchasing Contracts you have access to view as well as place a request for a new purchasing contract with a vendor 
11	**Sourcing** gives end users the ability to view all Procurement Sourcing Events when a user is identified as a stakeholder 

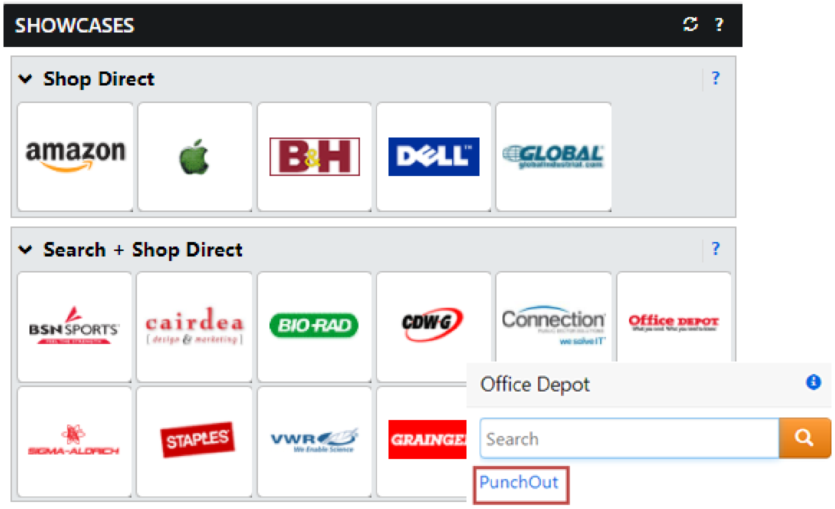
Exercise 4: Shopping from a Punch-out Store

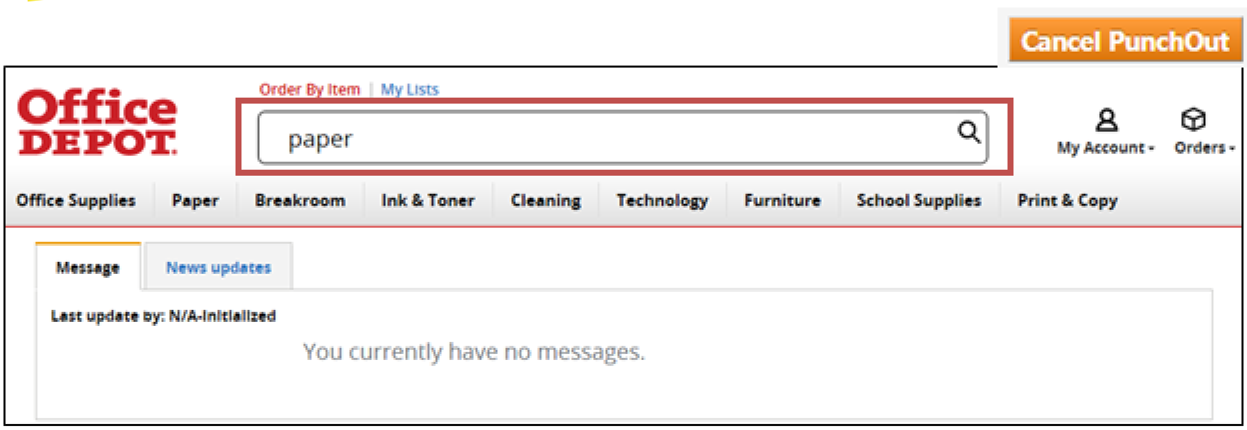
Punch-out store catalogs are integrated external links to a supplier's web-based catalog. The user exits the application to search and select products from a supplier's web catalog, then returns the items to the Hilltop Shop shopping cart. The selected items are then submitted through the standard requisition/order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

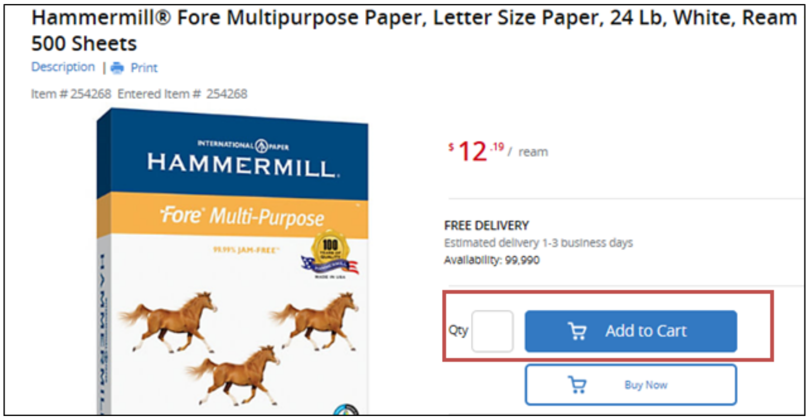
Purchasing and Ancillary Services (PaAs) has setup strategic relationships with a number of vendors frequently used by the campus community. These vendors have the ability to maintain a Punch-Out Store. Punch-out Stores provide the USF campus community with the following advantages:

- 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	From the homepage, navigate to the **Showcases** located in the lower right of the dashboard. Under **Showcases** lists the Vendors that are available.  Helpful Tips Always review the Vendor Showcase Section. Additional Vendor Hosted Catalogs and Punch-Out Stores are coming soon!
3	Select a Vendor. Click the **PunchOut** link to be taken to the supplier's website

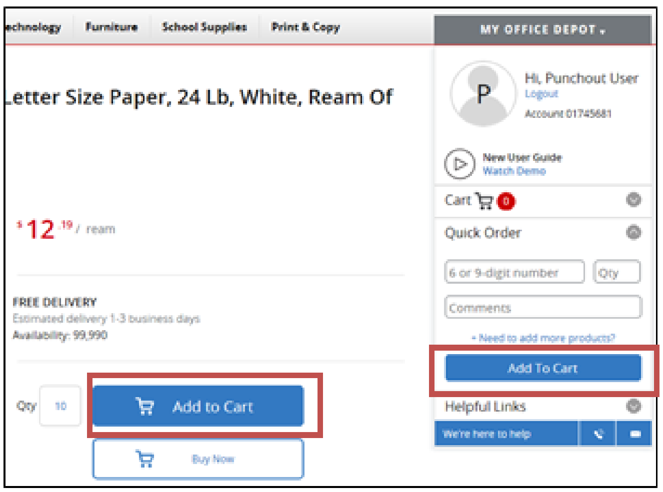
	
4	From within the Vendor's website, you can browse or search for items from the Punch-Out Store. In this example, we use the search feature to shop for "paper"

	  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**



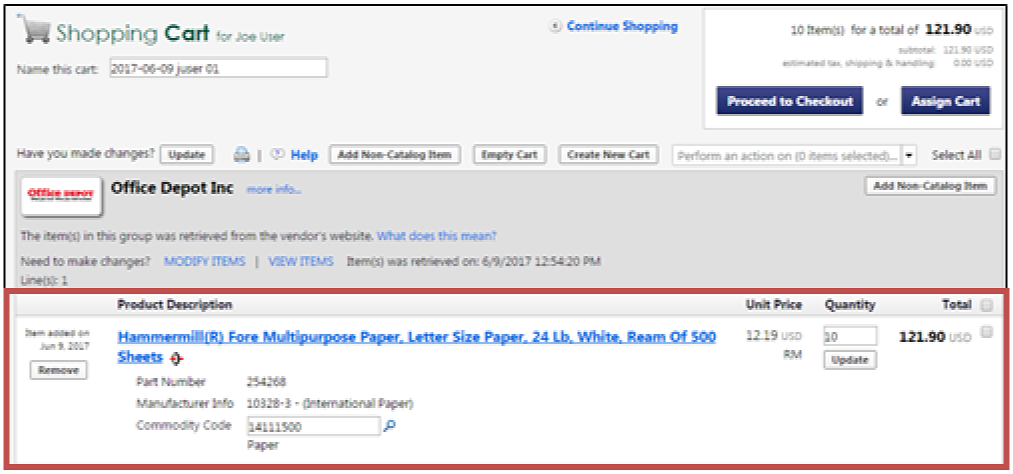
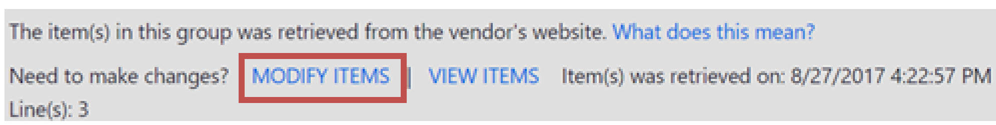
Each Vendor's Punch-Out Store will navigate differently

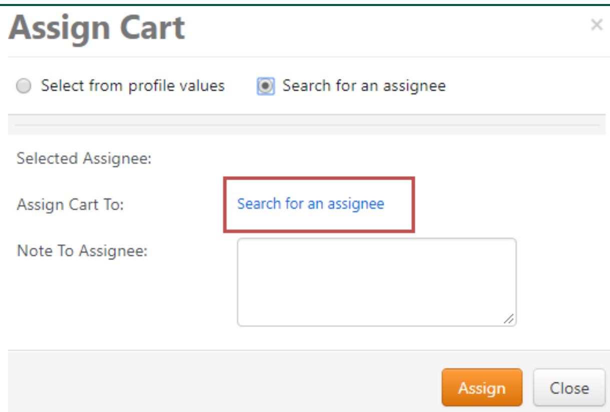
6 Click **Add to Cart** in the middle or right-hand corner of the screen



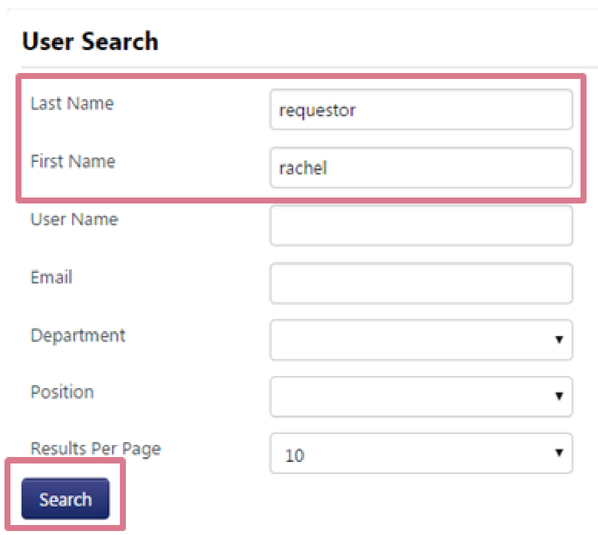
7 Review shopping cart items and click **Check Out**

8 Items should appear in your active shopping cart

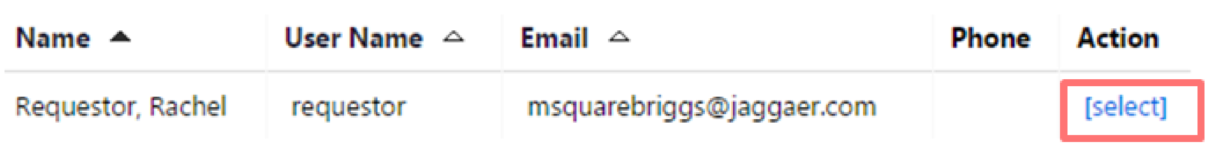
	  
9	Click on the text box next to **Name This Cart** and enter a name for the cart that will be more meaningful to you and any Requestor or Approvers who will need to review your order 
10	The Shopper role does not have the permission to assign the charging FOAP. Shoppers assign their carts to a Requestor.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



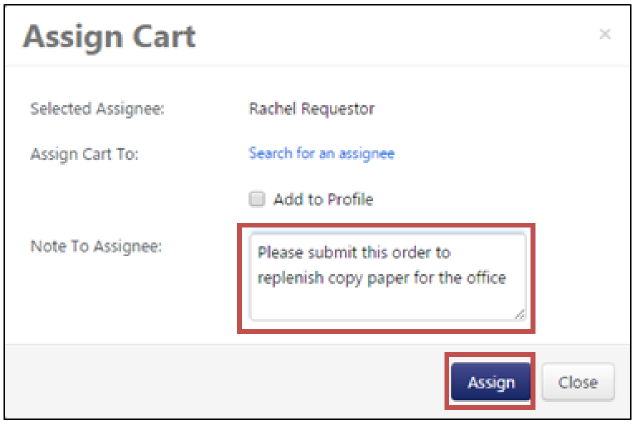
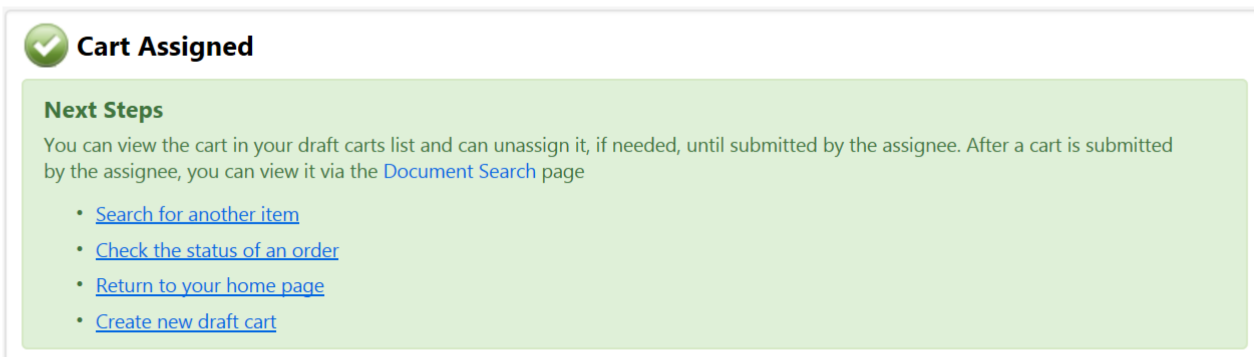
12 Enter either the **Last Name** or **First Name** of the Requestor then click on the **Search** button



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



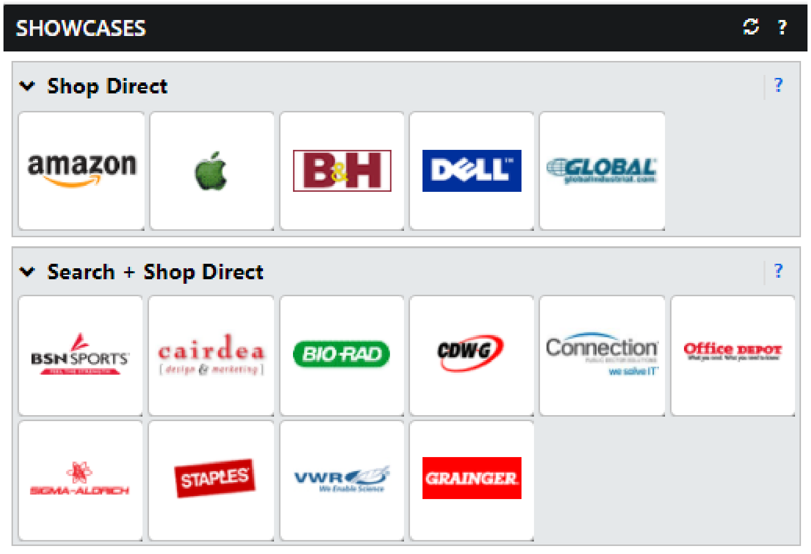
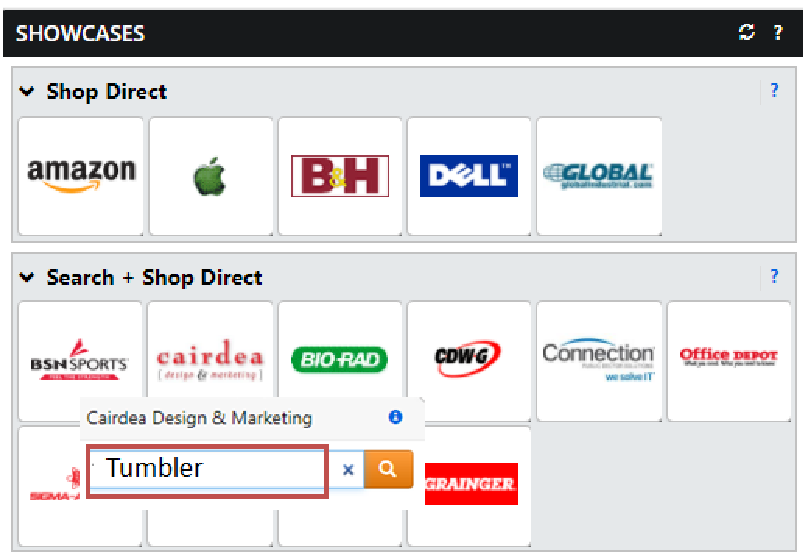
14 Fill in the **Note to Assignee** field with a brief description of the order then click on the **Assign** button.

<table>
<tr><td></td><td>
</td></tr>
<tr><td>15</td><td>System message indicates your cart was successfully assigned

</td></tr>
</table>

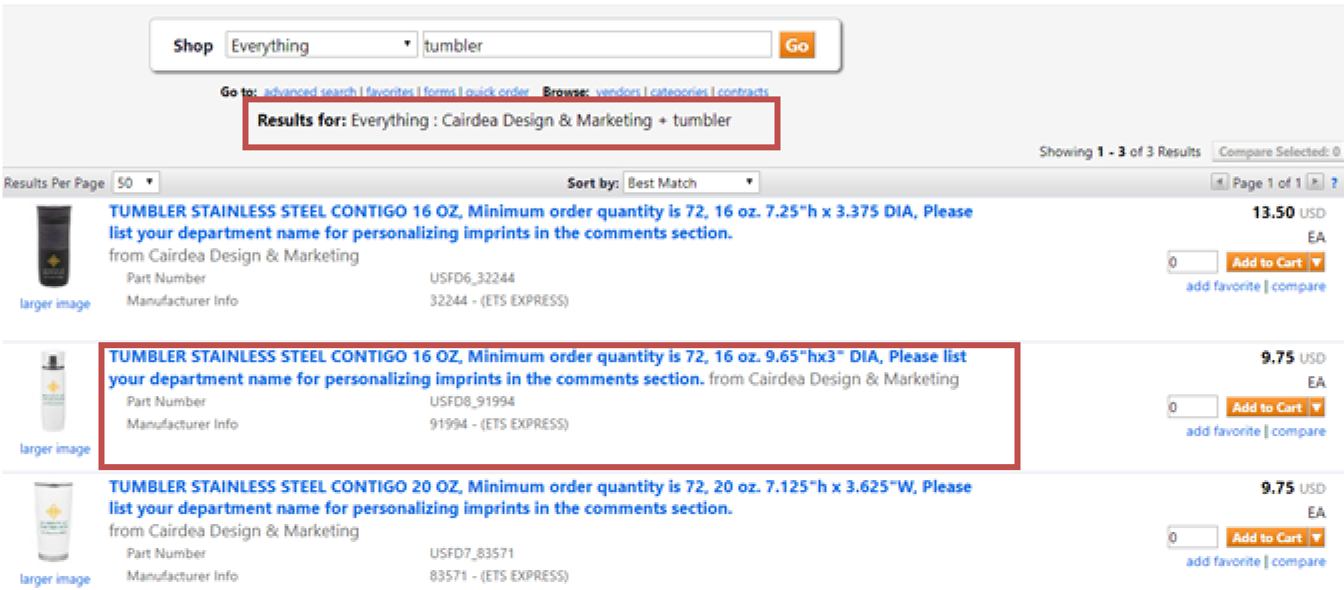
Exercise 5: Shopping from a Hosted Catalog

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.

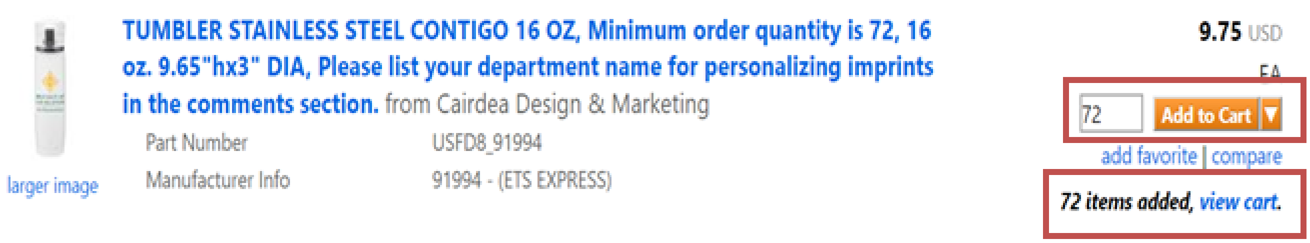
Step	Description
1	Login to Hilltop Shop using the username and password provided to you for training. In production, Hilltop Shop is accessed through myUSF using your username and password.
2	From the homepage, navigate to the **Showcases** located in the lower right of the dashboard. Under **Showcases**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

<table>
<tr><td></td><td>
</td></tr>
<tr><td>3</td><td>Select a Vendor. Type in either the description or part number for the item and click the Search Icon.

</td></tr>
<tr><td>4</td><td>Below are the search results for ‘tumbler’ from Cairdea Design and Marketing Hosted Catalog.</td></tr>
</table>

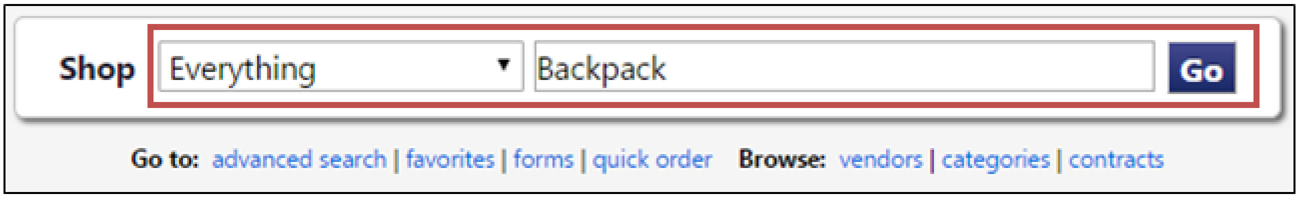
<table>
<tr><td></td><td>

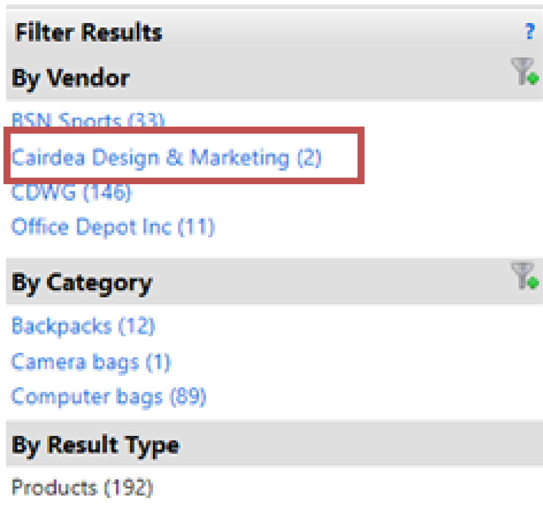
Please review item descriptions for special instructions from the vendor. In this example, the vendor has a minimum order quantity of 72 each and personalization instructions are required for the vendor to process the order.
</td></tr>
<tr><td>5</td><td>
To add the item of choice to your cart, type in quantity and click on Add to Cart. The refreshed screen shows the items are added to your cart

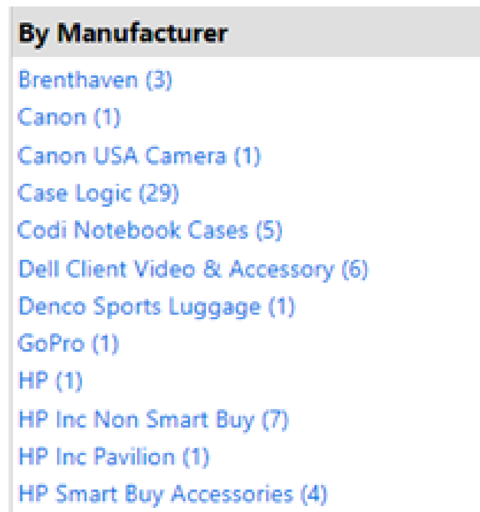


</td></tr>
<tr><td>6</td><td>
To add additional items to a cart, scroll to the top of the page and type in the product description or part number in the search bar. Click Go.
</td></tr>
</table>

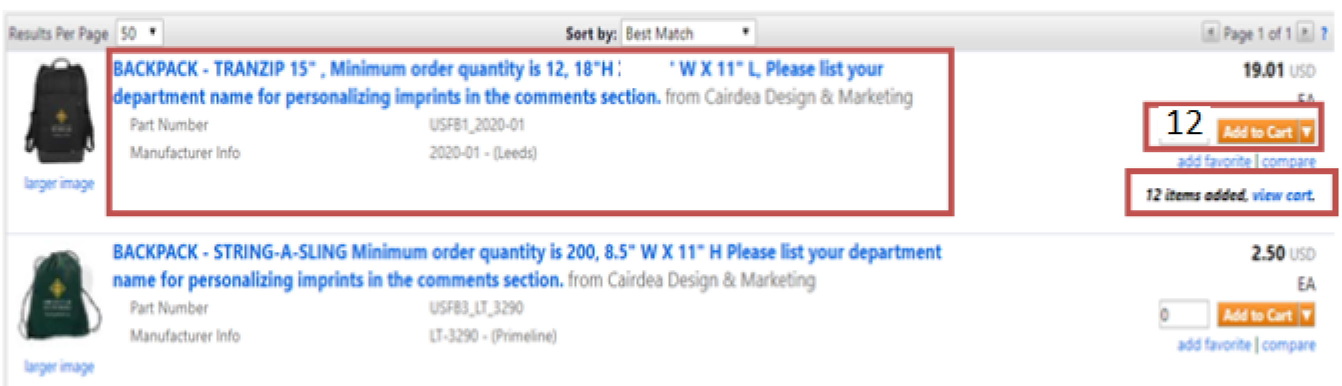


7 If the search returns too many products or options, you can apply filters to narrow the selection. For this exercise, please select Cairdera Design & Marketing.





8 Review item description, type in quantity and click **Add to Cart**. The refreshed screen shows the items are added to your cart



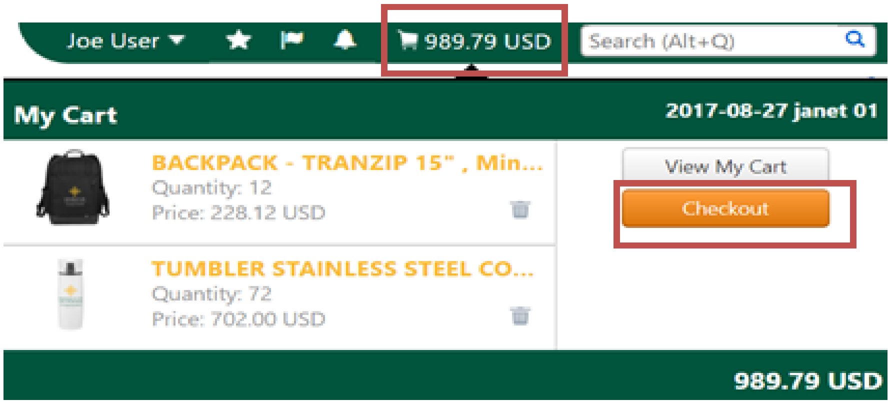
In 

this example, the vendor has a minimum order quantity of 12 each and personalization instructions are required for the vendor to process the order.

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**

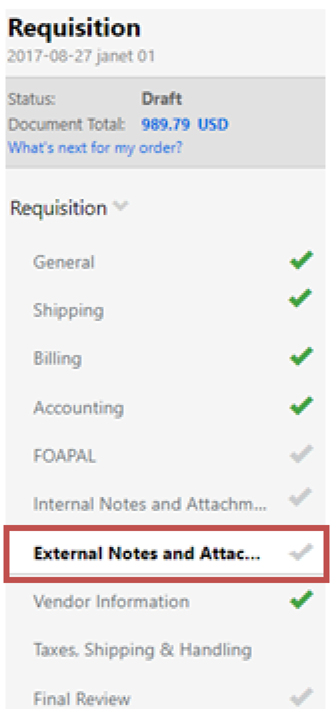


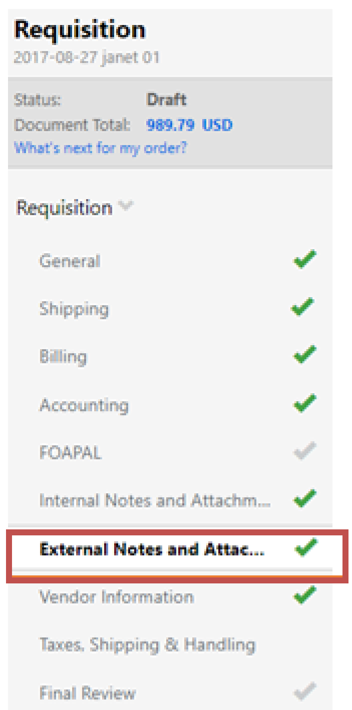
If the vendor **does not** require an External Note and Attachments, click **View My Cart** and proceed to Step 13.

10

OPTIONAL

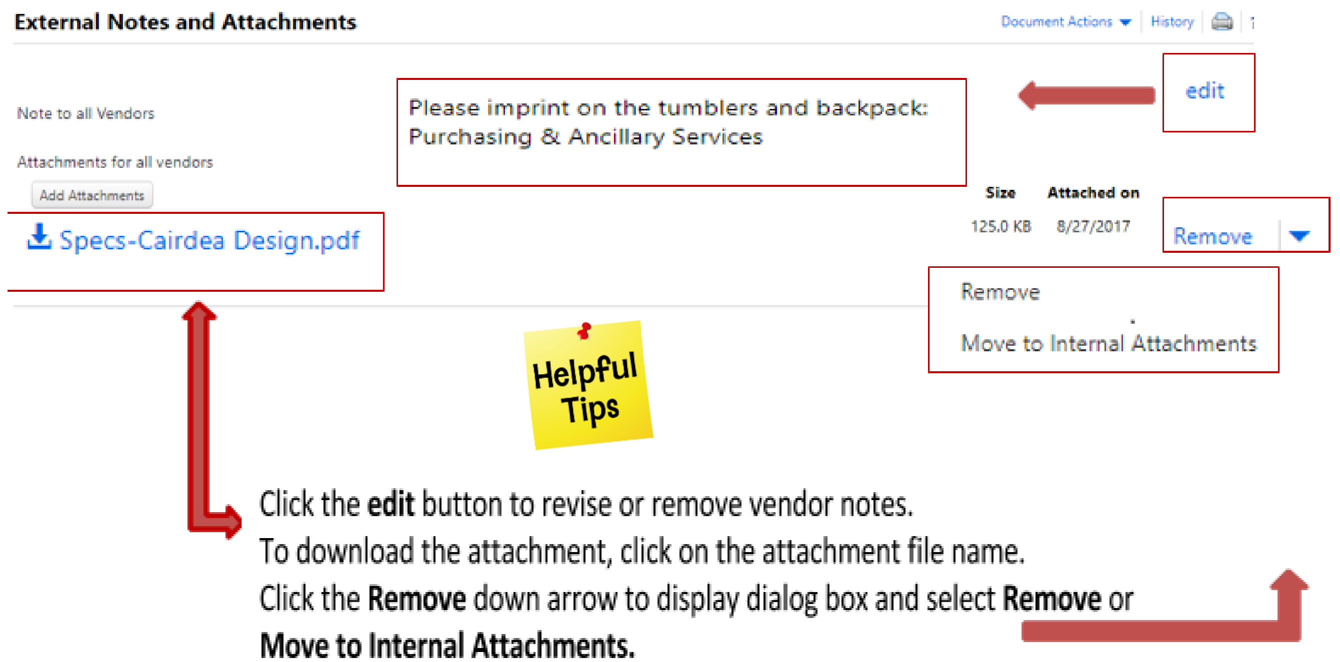
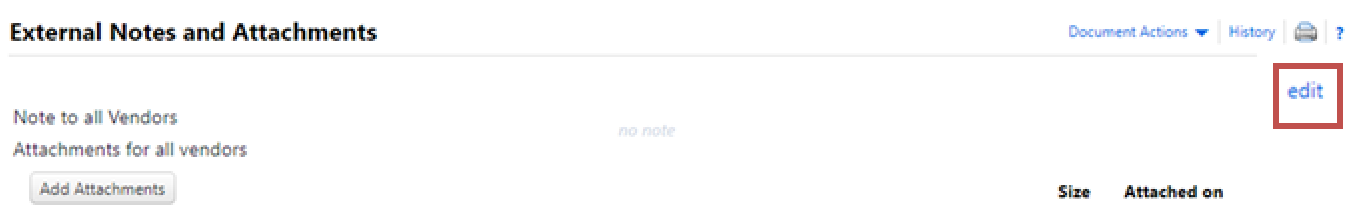
A. To include vendor comments and attachments, Click **External Notes and Attachments** from the left navigation bar. The checkmark will not turn green until you have completed this step

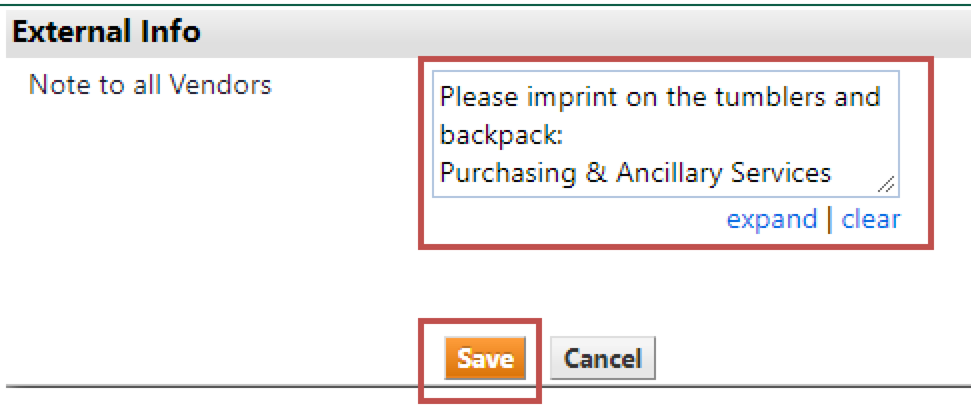




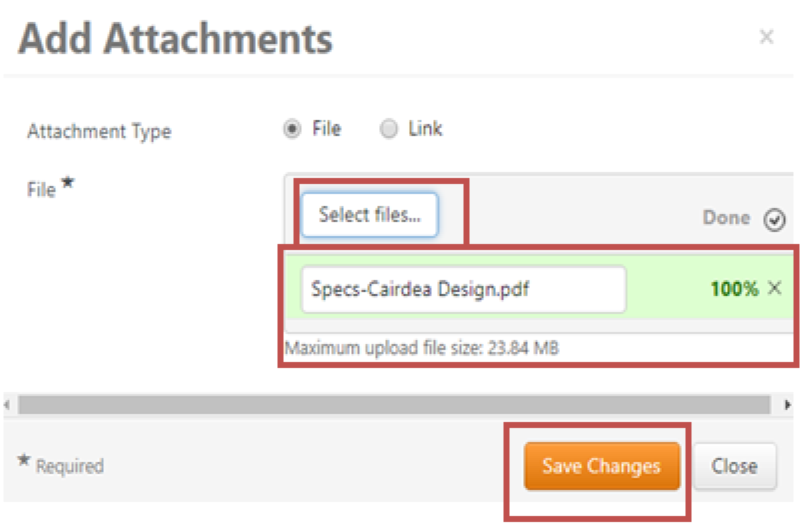
Reminder: A Shopper cannot complete the FOAPAL field because of Banner Security. The Shopper must **ASSIGN** cart to a Requestor to provide FOAP information.

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

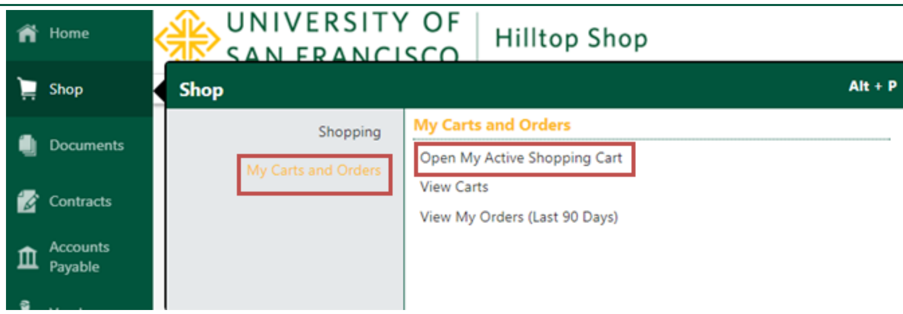
	
11	**OPTIONAL** A. To add **External Notes and Attachments**, click **edit** located on the left of the screen  **B. External Info** dialog box opens, type in the imprint instruction and click **Save**



C. To include an **External Attachment**, click the **Add Attachments** button. The **Add Attachment**s 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.

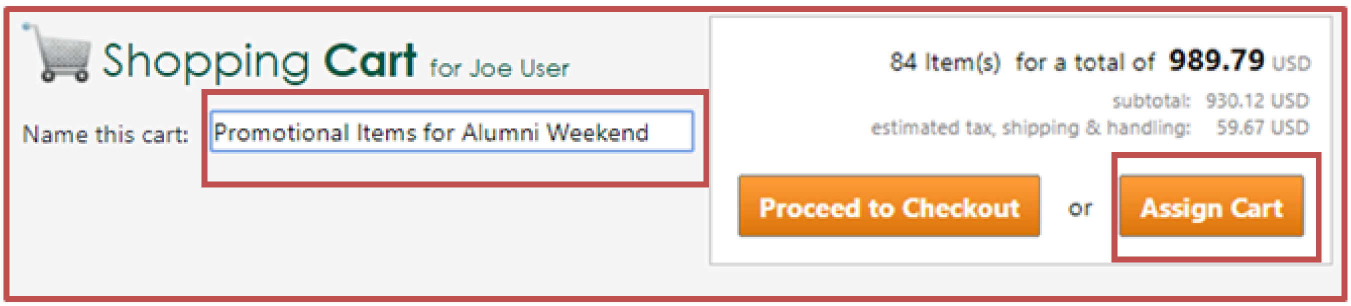


12 Follow the path to complete your Shopping Cart. Alternatively, you may use the Alt + P shortcut to open the Shop Dialog Box. Click **My Carts and Orders** and select **Open My Active Shopping Cart**

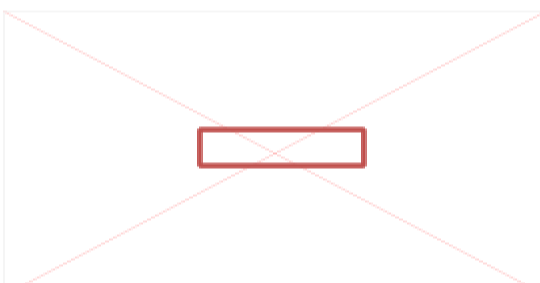


You may also select **View Carts** to view all draft carts.

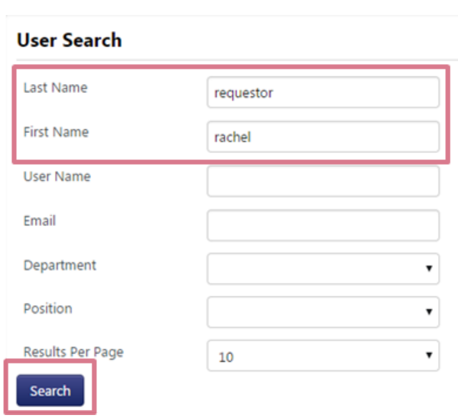
13 Click on the text box next to **Name This Cart** and enter a name for the cart that will be more meaningful to you and any Requestor or Approvers who will need to review your order. Click on **Assign Cart**



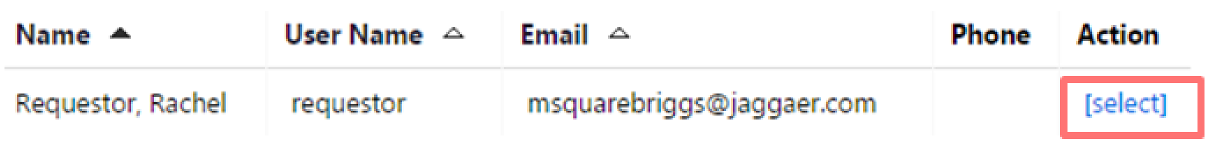
14 Click on the **Search for an assignee** link.



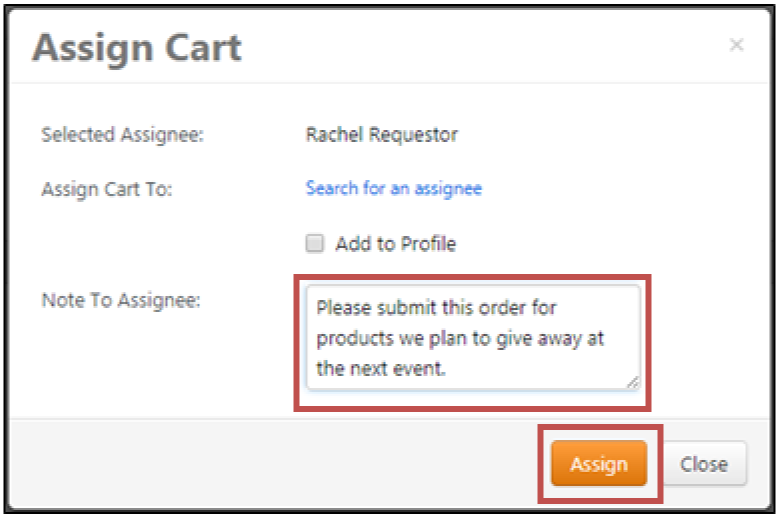
15 Enter Last Name or **First Name** of the Requestor and click the **Search** button.



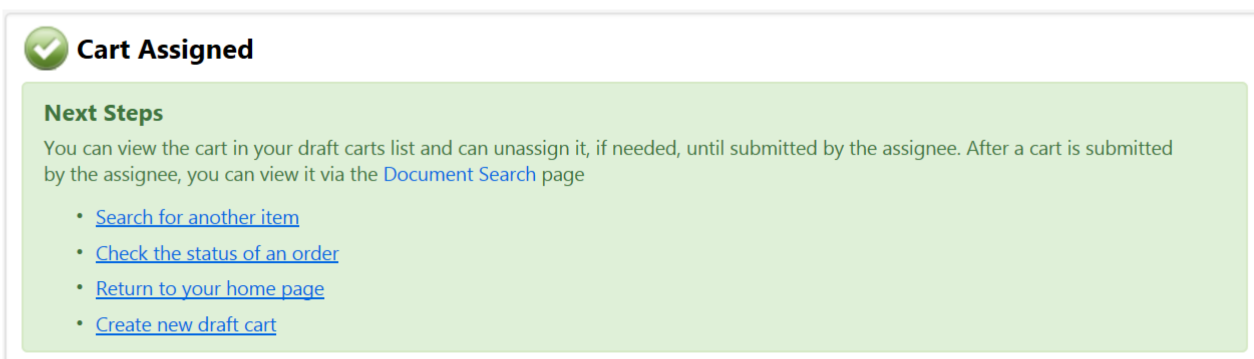
<table>
<tr><td>16</td><td>Find the name of the Requestor in your department and click Select.



</td></tr>
<tr><td>17</td><td>Fill in the Note to Assignee field with a brief description of the order and click on the Assign button.



</td></tr>
<tr><td>18</td><td>System message indicates your cart was successfully assigned



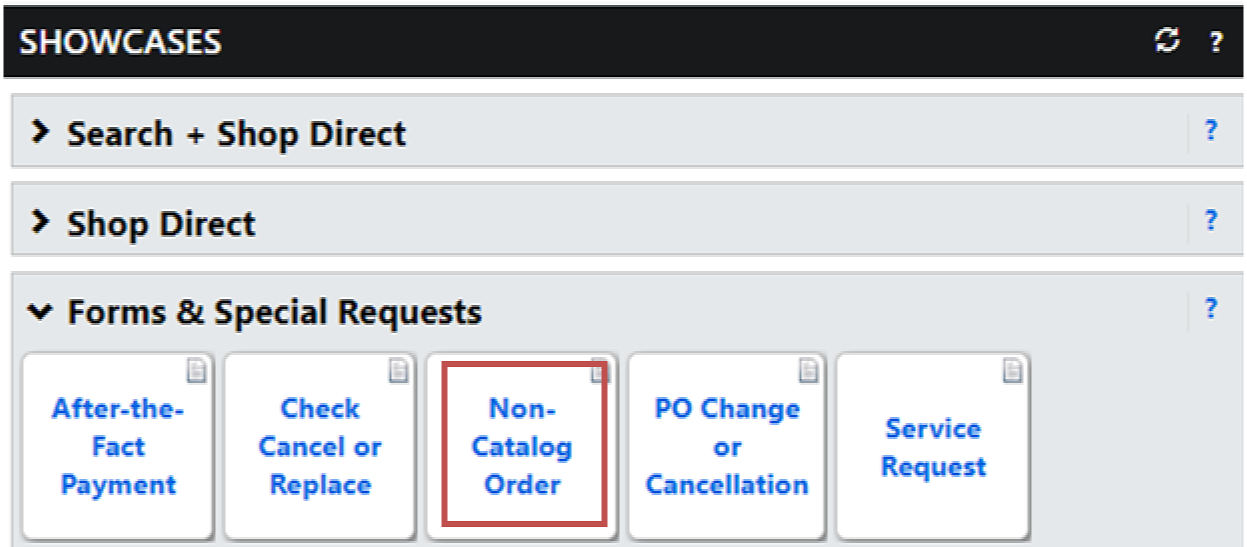
</td></tr>
</table>

Exercise 6: Shopping using the Non-Catalog Form

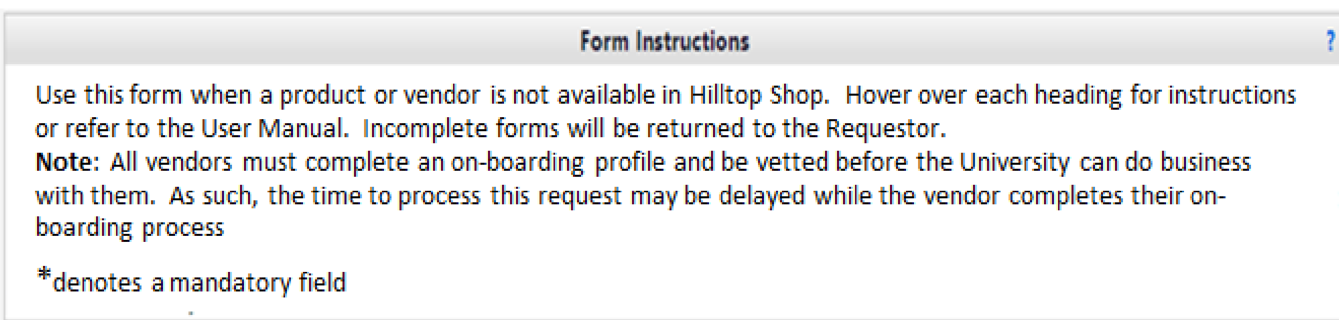
Hilltop Shop has a variety of Hosted Catalogs and Punch-Out Stores. However, there will be many occasions where users will need to submit a requisition for products and/or services that are not available through the Hosted Catalogs or Punch-Out stores showcased. To accomplish this, Hilltop Shop has several 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

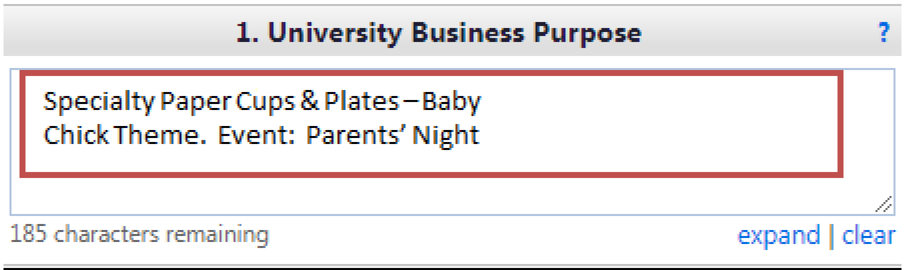
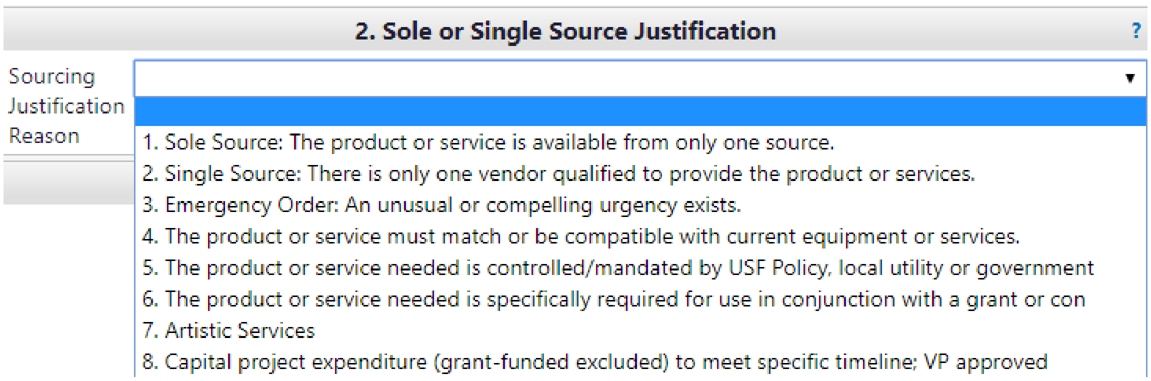
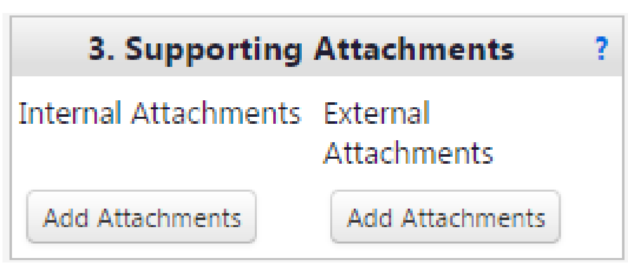
<table>
<tr><td>1</td><td>Login to Hilltop Shop using the username and password provided to you for training. In production, Hilltop Shop is accessed through myUSF using your username and password.</td></tr>
<tr><td>2</td><td>From the homepage, navigate to the Forms section, located under Showcases. Click on Non-Catalog Order sticker.

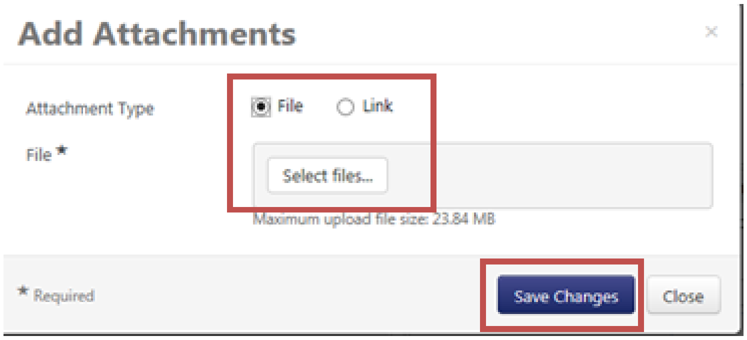


</td></tr>
<tr><td>3</td><td>The Non-Catalog Order form will open. Please read the Form Instructions at the top of the screen before filling out the form.

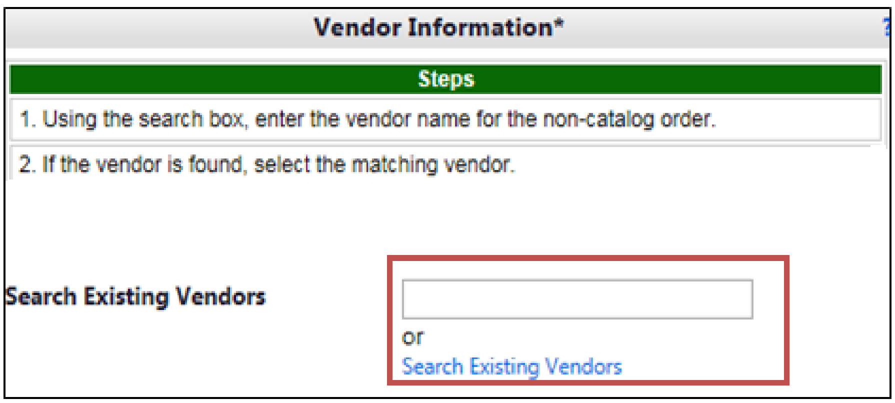


</td></tr>
<tr><td>4</td><td>Complete the University Business Purpose section by typing the purpose of the purchase (Note: this is a required section)</td></tr>
</table>

	
5	Please complete the **Sole Source Justification** 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 **Justification Reason**. 
6	Click the **Add Attachments** to provide supplemental information or quotes. **Internal Attachments** are **only** viewable to USF employees; they are not sent to the Vendor. Examples of internal attachments are: ▪ Quotes provided by all vendors ▪ Internal USF information that is important for approvers to review **External Attachments** are sent to the vendor when the PO is dispatched. **Only** include attachments you intend to share with the vendor. Examples of external attachments are: ▪ Quote provided by the vendor the purchase is being made against ▪ Specifications or other documentation the vendor will need to process the order Note: The maximum file size is 50 MB   To review, edit, or remove notes and attachments, please refer to Exercise 5, Steps 10 and 11 for detailed instructions.
7	Add attachments by selecting the file from your computer or by entering a link to a website. Click **Save Changes.**

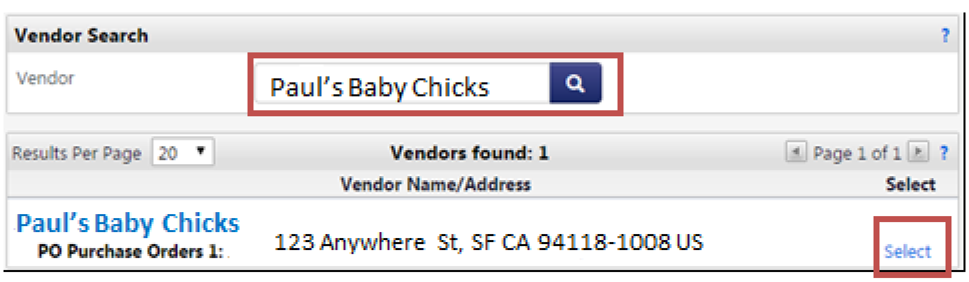


8 Enter the **Vendor Information**. Use the search box to search for existing vendors and select the matching vendor.

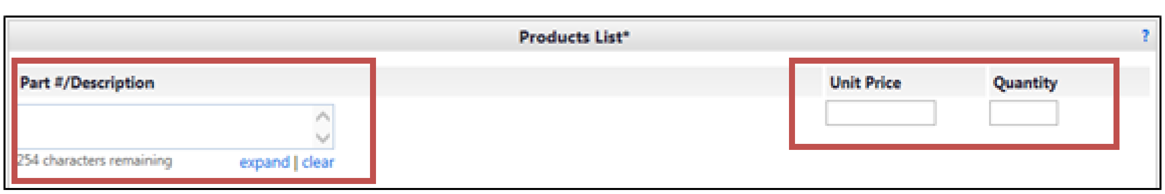


If the vendor information is not in Hilltop Shop, users are required to submit the "**New Vendor Request by USF Shopper**" form. The form is available in the Quick Links box at the shopping home page

9 By selecting **Search Existing Vendors**, a new page should appear. Type the vendor's name into the search box, click **Select** next to the first address in the list.

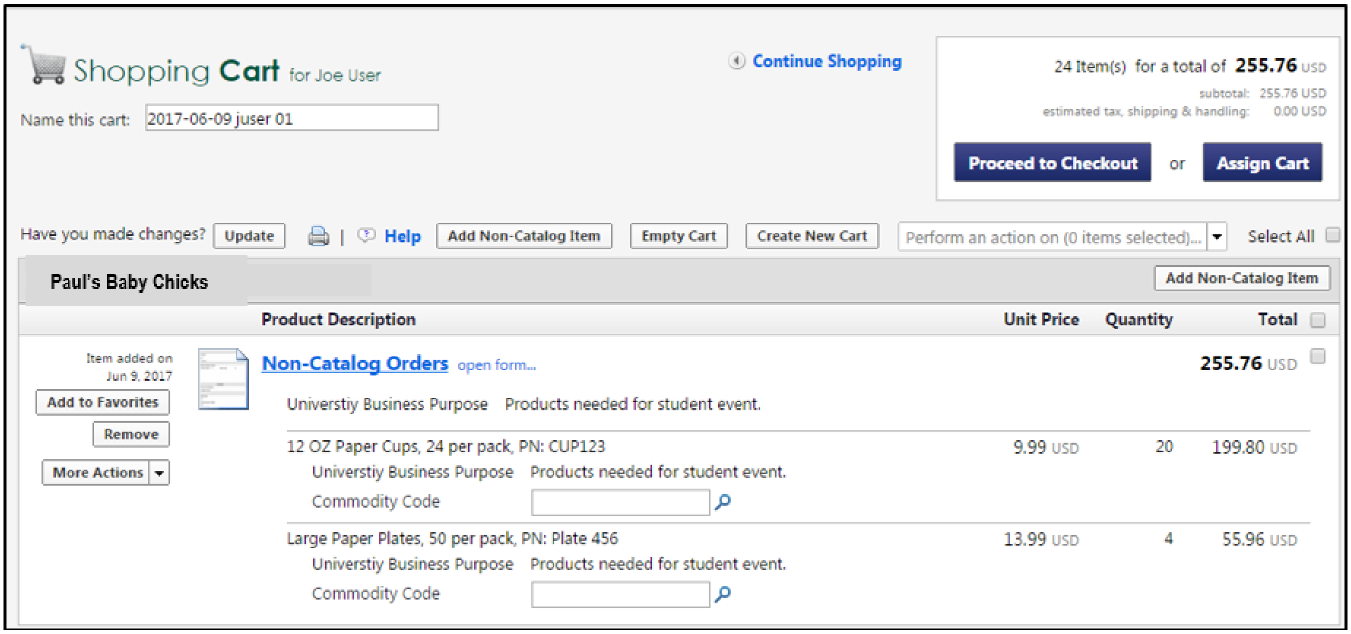


10 Scroll down to the **Product List.** Enter the **Part Number/Description**, the **Unit Price**, and **Quantity**. Scroll down to the next line item and repeat this step to add additional items.

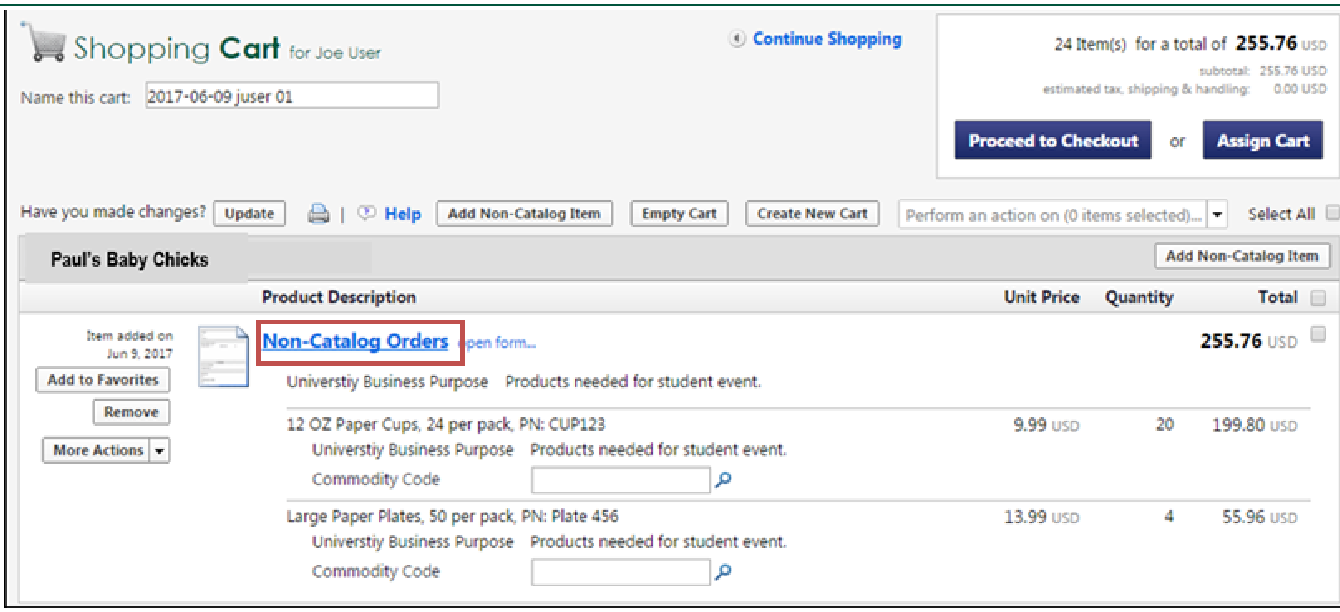


11 Once the form is completed, scroll up to the top of the page and click on the drop down menu next to **Available Actions** in the upper right-hand corner. Select **Add and Go To Cart** and press the **Go** button.

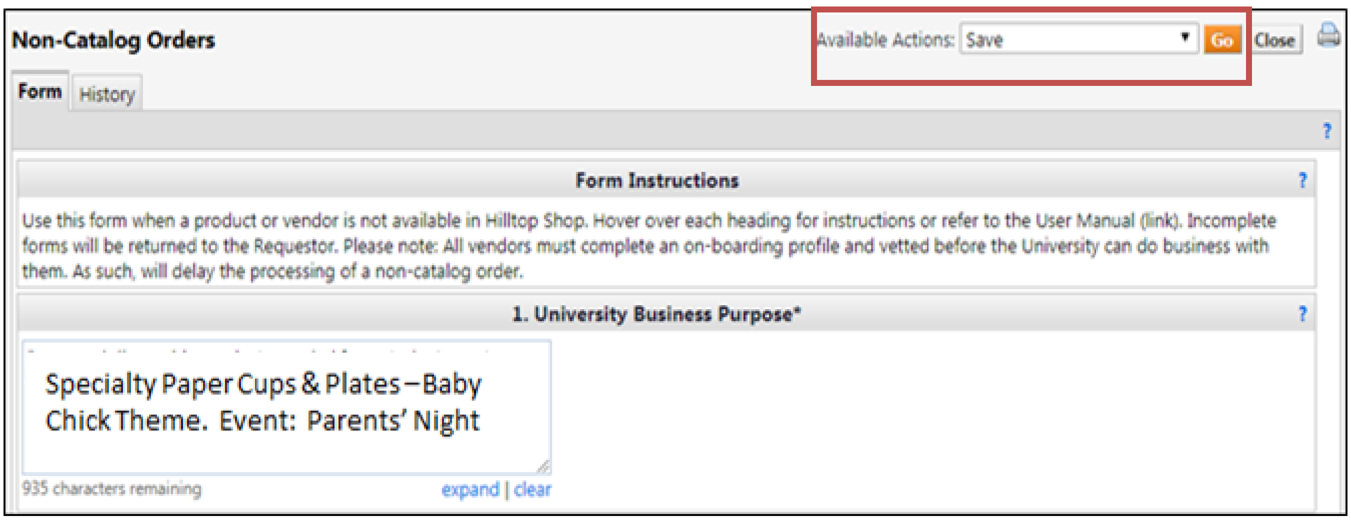
12 The items should now appear in your active shopping cart.



13 If you need to make modifications to the form (update price, quantity, descriptions, etc…), click on **Non-Catalog Orders** link above the line items.



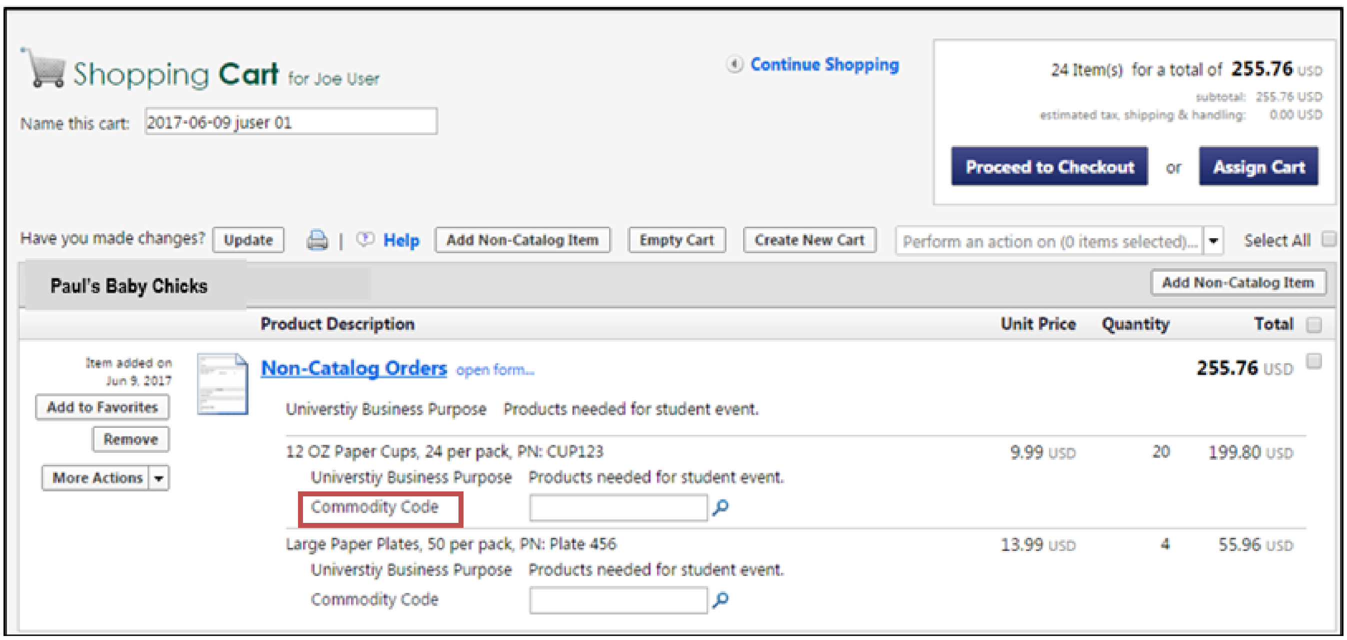
14 The form will reopen, and you can change the information in the form. Once complete, scroll back to the top of the form, make sure the **Available Actions** is set to **Save**, then click on **Go**.



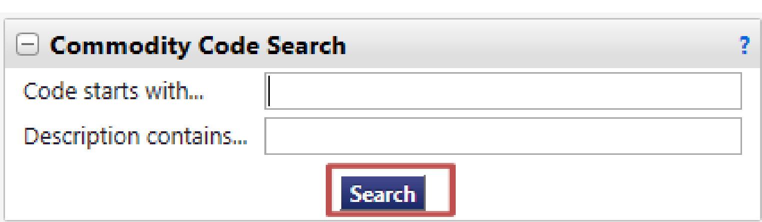
15 Click on the text box next to **Name This Cart** and enter a name for the cart that will be more meaningful to you and any Requestor or Approvers who will need to review your order.

16 **Optional**: Users can update the **UNSPSC Commodity Code** 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

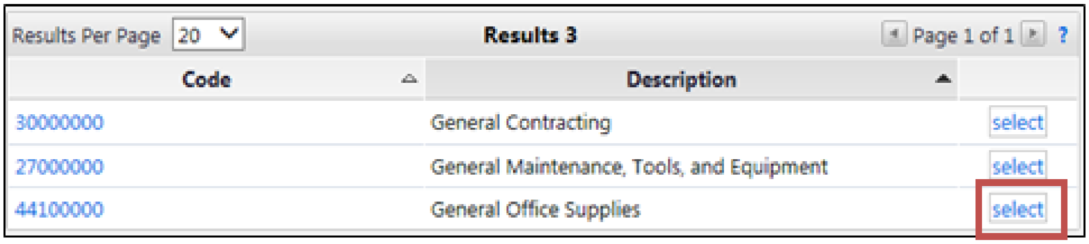
The UNSPSC Commodity Code **is not required** to submit the form. Purchasing & Ancillary Services (PaaS) will assign the proper UNSPSC Commodity Code that matches the items or services ordered.



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

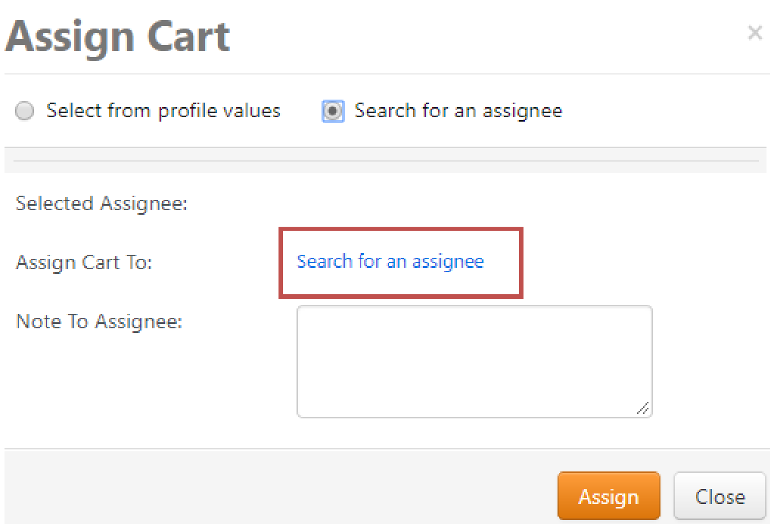


After finding the correct Commodity Code, click **Select.** Repeat this step for each line item in the Shopping Cart

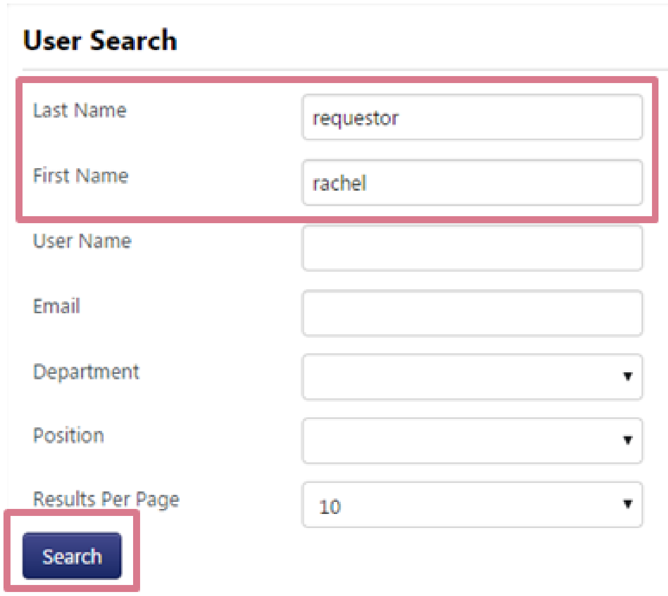


18 Click the **Assign Cart** button

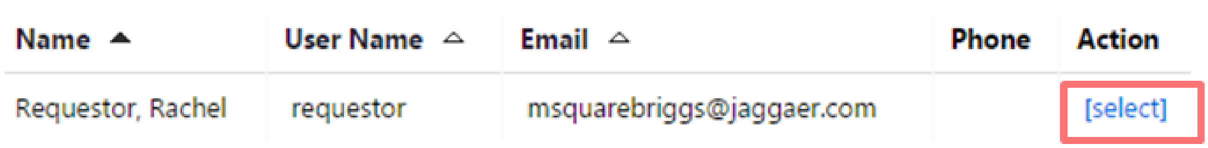
19 Click on the **Search for an assignee** link.



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

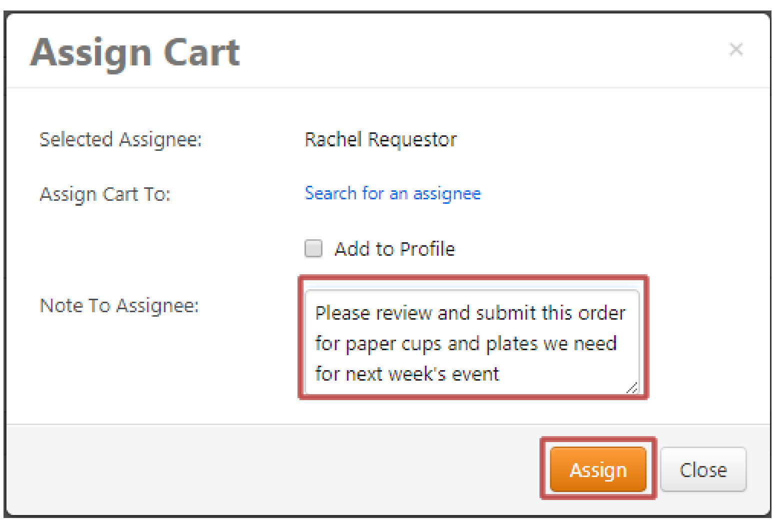


21 Find the name of the Requestor in your department and click **Select.**

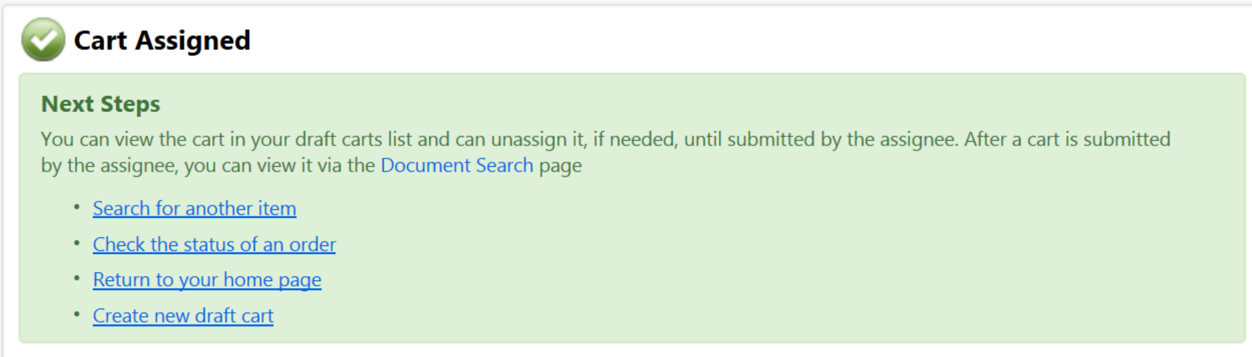


Name	User Name	Email	Phone	Action
Requestor, Rachel	requestor	msquarebriggs@jaggaer.com		[select]

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

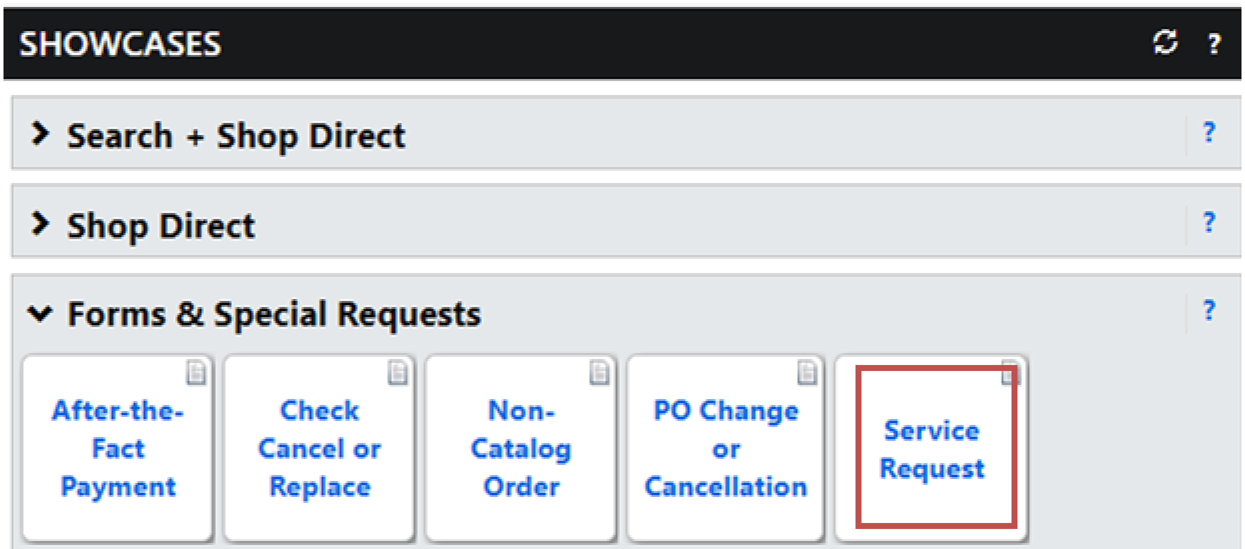
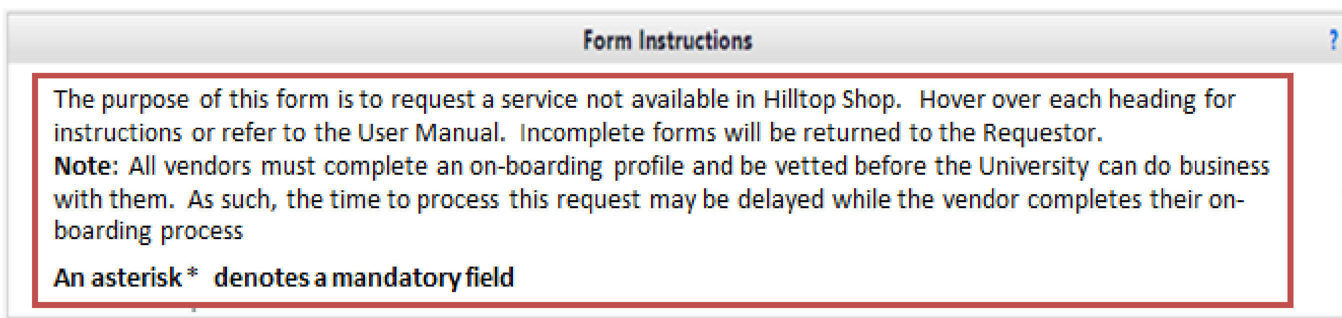


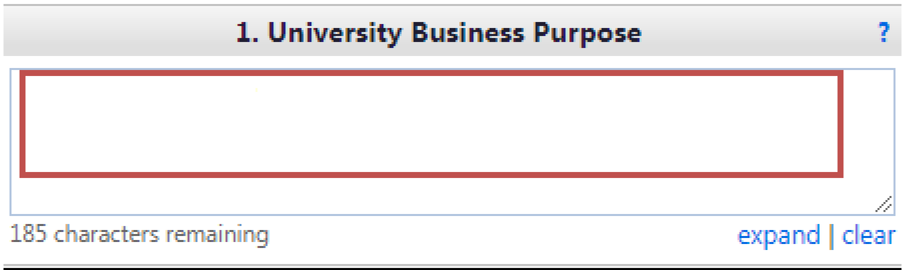
23 System message indicates your cart was successfully assigned


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

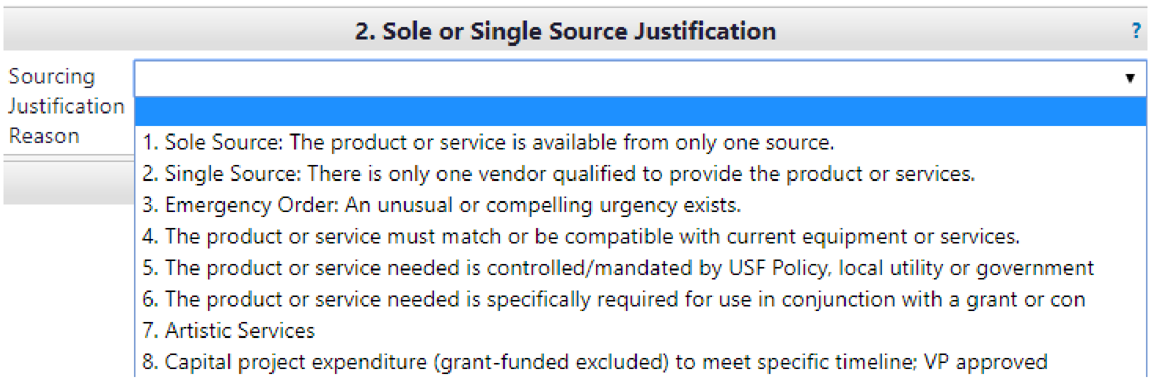
Exercise 7: Shopping Using the Service Request Form

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	From the homepage, navigate to the **Forms** section, located under **Showcases**. Click on **Service Request** sticker. 
3	The Service Request form will open. Please read the **Form Instructions** at the top of the screen before filling out the form. 
4	Complete the **University Business Purpose** section by typing the purpose of the purchase (Note: this is a required section)



5 Please complete the **Sole Source Justification** 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 **Justification Reason**.



6 Click the **Add Attachments** to provide supplemental information or quotes.

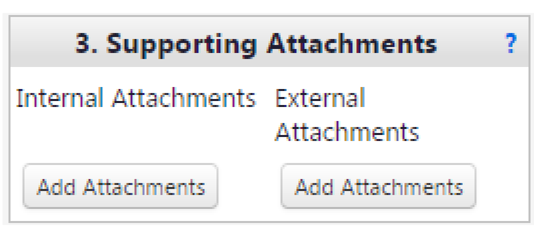
Internal Attachments are **only** viewable to USF employees; they are not sent to the Vendor. Examples of internal attachments are:

- Quotes provided by all vendors
- Internal USF information that is important for approvers to review

External Attachments are sent to the vendor when the PO is dispatched. **Only** include attachments you intend to share with the vendor. Examples of external attachments are:

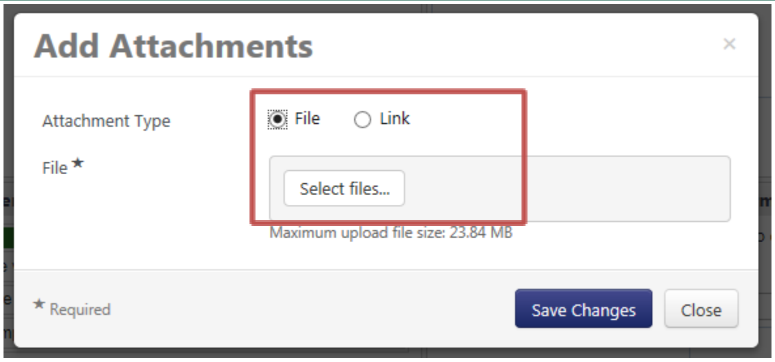
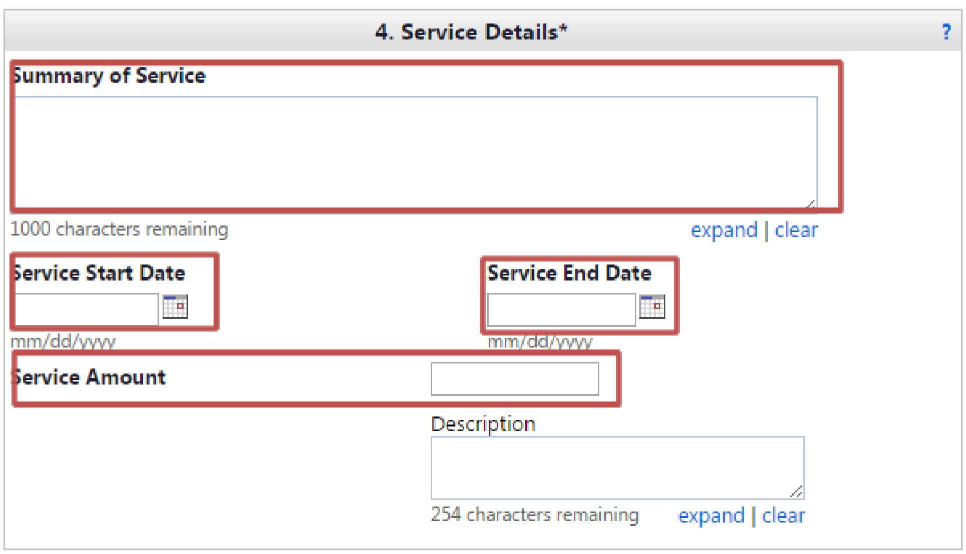
- Quote provided by the vendor the purchase is being made against
- Specifications or other documentation the vendor will need to process the order

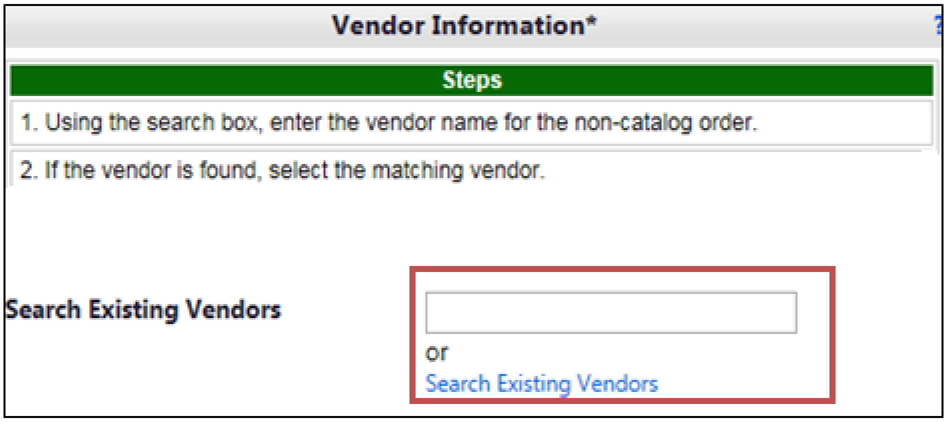
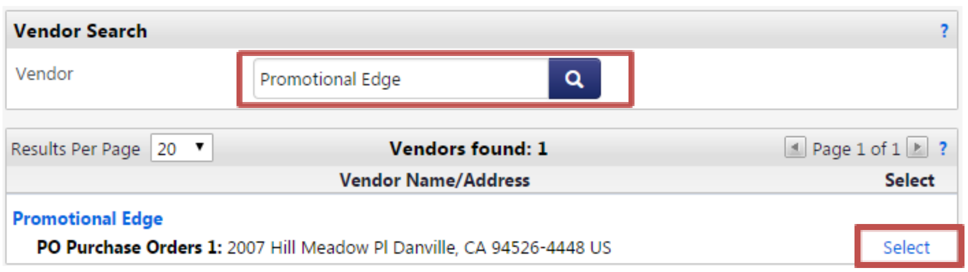
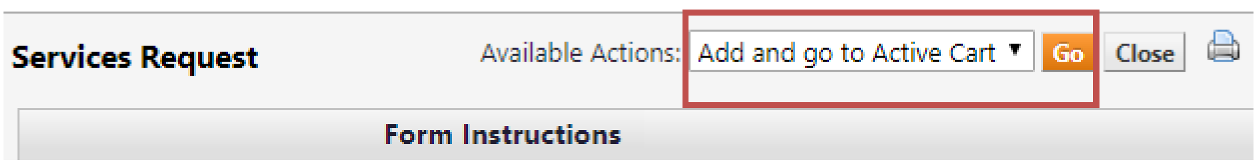
Note: The maximum file size is 50 MB

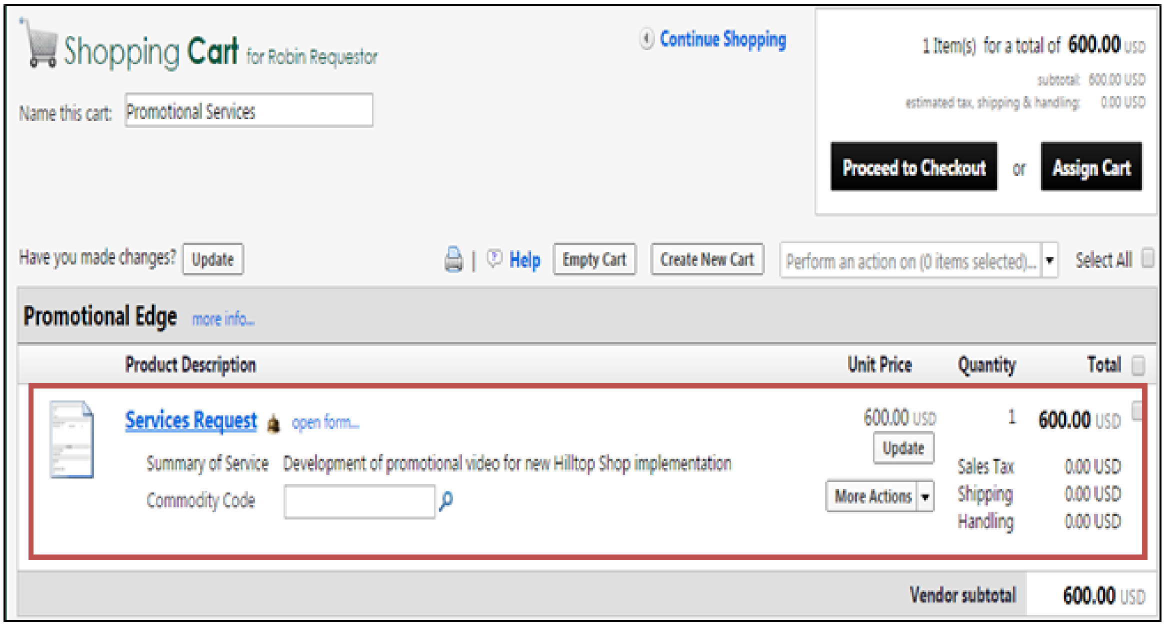


To review, edit, or remove notes and attachments, please refer to Exercise 5, Steps 10 and 11 for detailed instructions.

7 Attachments can be added by selecting a file from your computer or by entering a link to a website. Click **Save Changes**

	
8	Complete the **Services Details** section with the specific details of the service including: • **Summary of Service:** Detailed description of the service the vendor will perform for USF • **Service Start Date:** The date the vendor will begin the work according to the statement of work • **Service End Date:** The date the vendor will end the work according to the statement of work • **Service Amount:** Total amount of the service 
9	Enter the **Vendor Information**. Use the search box to search for existing vendors and select the matching vendor.

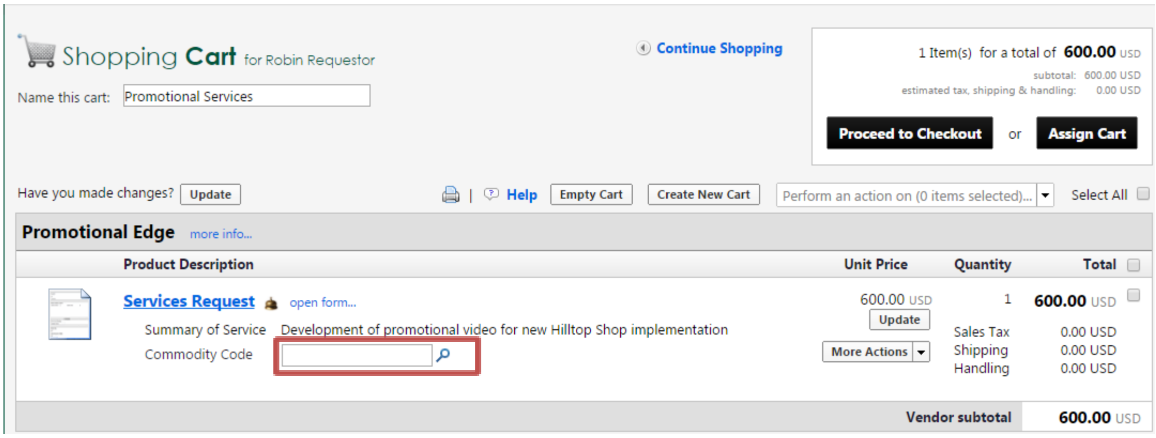
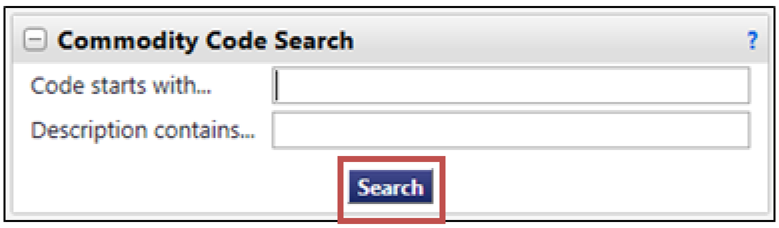
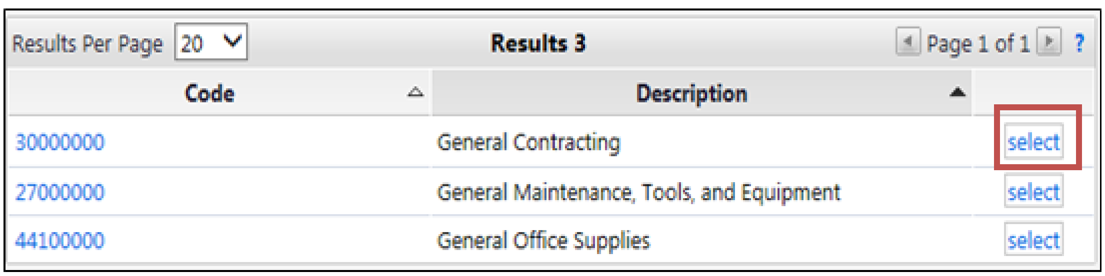
	 If the vendor information is not in Hilltop Shop, users are required to submit the "**New Vendor Request by USF Shopper**" form. The form is available in the Quick Links box at the shopping home page
10	By selecting **Search Existing Vendors**, a new page should appear. Type the vendor name into the search box then click on **Select next** to the first address in the list. 
11	Once the form is completed, scroll up to the top of the page and click on the drop down menu next to **Available Actions** in the upper right-hand corner. Select **Add and Go To Cart** and press the **Go** button. 
12	The services form should now appear in your active shopping cart.

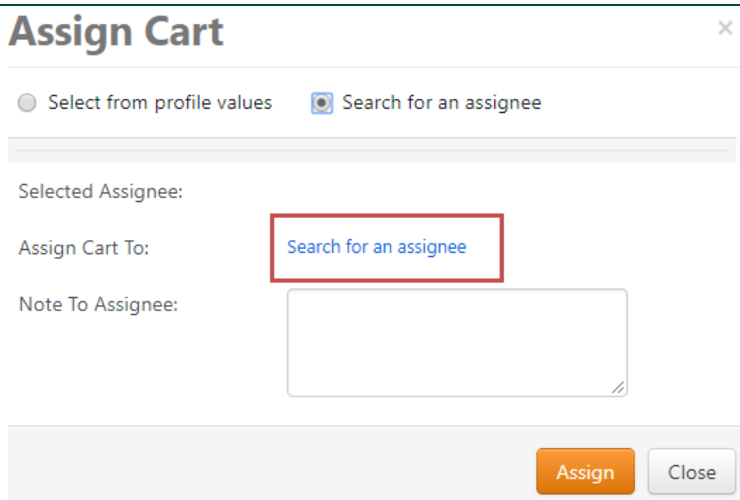
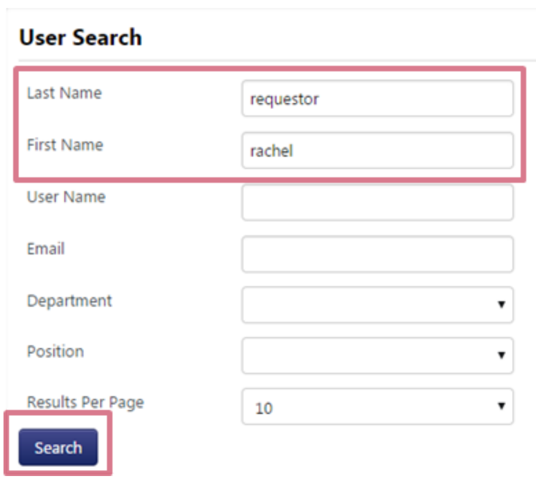


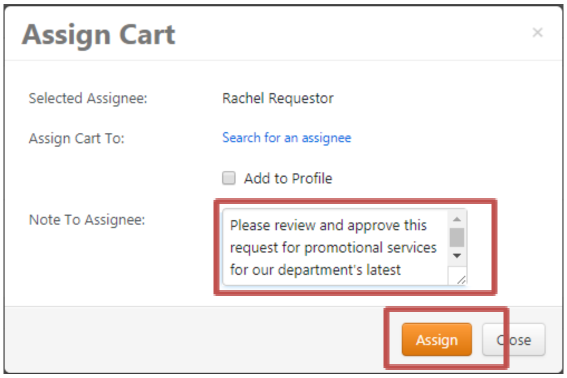
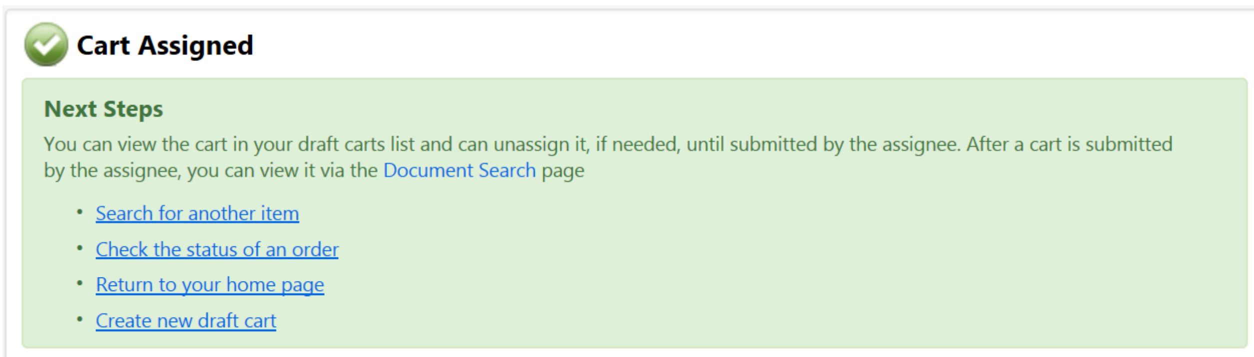
13 Click on the text box next to **Name This Cart** and enter a name for the cart that will be more meaningful to you and any Requestor or Approvers who will need to review your order.

14 **Optional**: Users can update the **UNSPSC Commodity Code** 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

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

	
15	**Optional:** Search for the UNSPSC Commodity Code by **Code starts with** or **Description contains** and click **Search**.  After finding the correct Commodity Code, click **Select.** Repeat this for each line item in the Shopping Cart 
16	Click the **Assign Cart** button 
17	Click on the **Search for an assignee** link.

<table>
<tr><td></td><td>
</td></tr>
<tr><td>18</td><td>Enter either the Last Name or First Name of the Requestor then click on the Search button

</td></tr>
<tr><td>19</td><td>Find the name of the Requestor in your department and click Select.
<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></td></tr>
<tr><td>20</td><td>Fill in the Note to Assignee field with a brief description of the order then click on the Assign button.</td></tr>
</table>

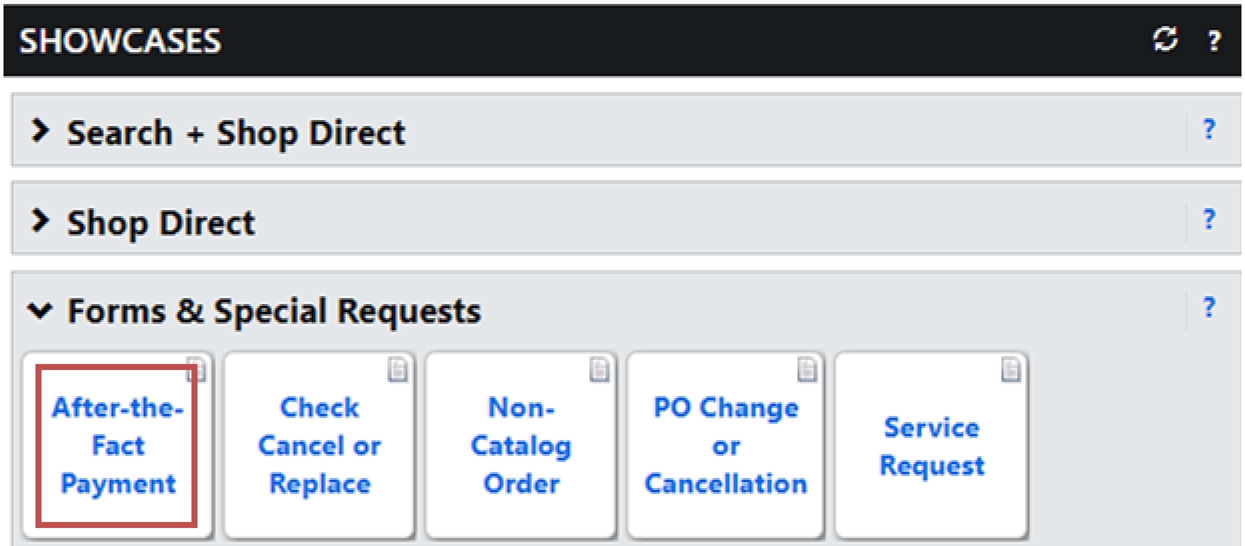
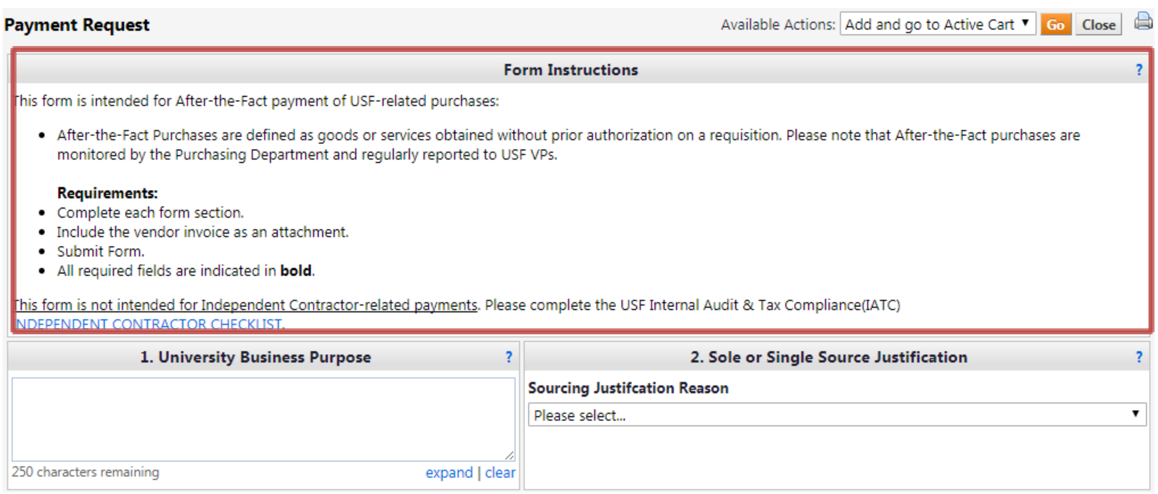
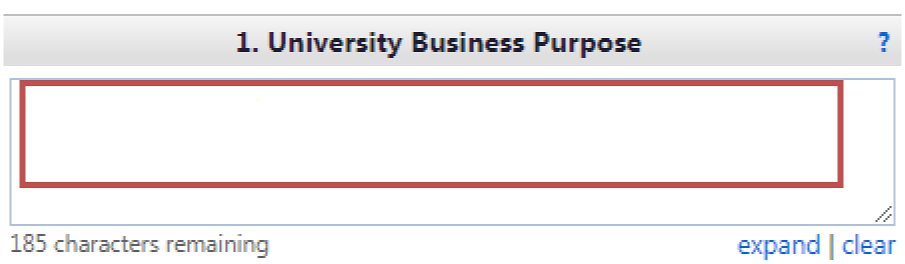
<table>
<tr><td></td><td>
</td></tr>
<tr><td>21</td><td>System message indicates your cart was successfully assigned

</td></tr>
</table>

Exercise 8: After-the-Fact Payment Form

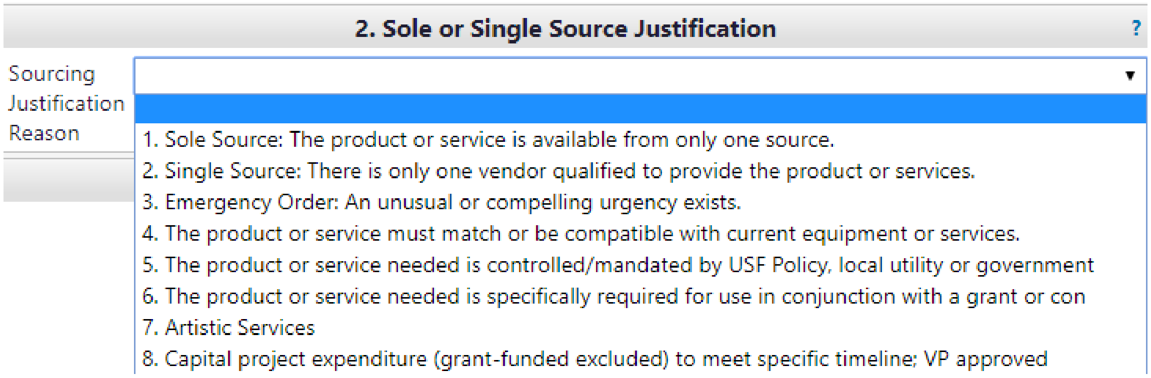
After-the-fact (ATF) purchases are typically invoices a department has received without first creating a Requisition in Hilltop Shop. An ATF is an unapproved obligation to purchase goods or services and is a temporary allowable process to help Departments transition from historic processes to Hilltop 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.

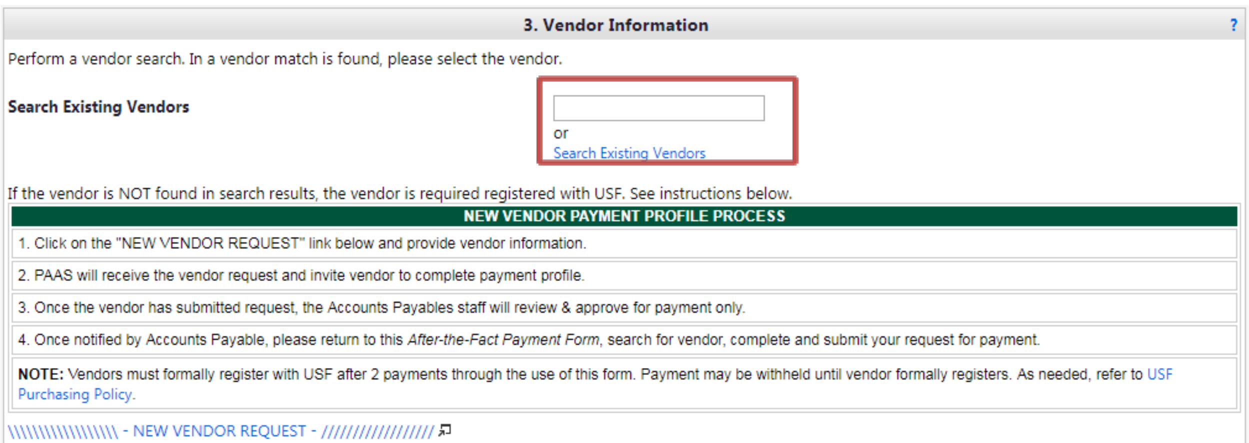
Step	Description
1	Login to Hilltop Shop using the username and password provided to you for training. In production, Hilltop Shop is accessed through myUSF using your username and password.
2	From the homepage, navigate to the **Forms** section, located under **Showcases**. Click on **After-the-Fact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

<table>
<tr>
<td></td>
<td>
</td>
</tr>
<tr>
<td>3</td>
<td>The After-the-Fact Payment form will open. Please read the Form Instructions at the top of the screen before filling out the form.

</td>
</tr>
<tr>
<td>4</td>
<td>Complete the University Business Purpose section by typing the purpose of the purchase (Note: this is a required section)

</td>
</tr>
</table>

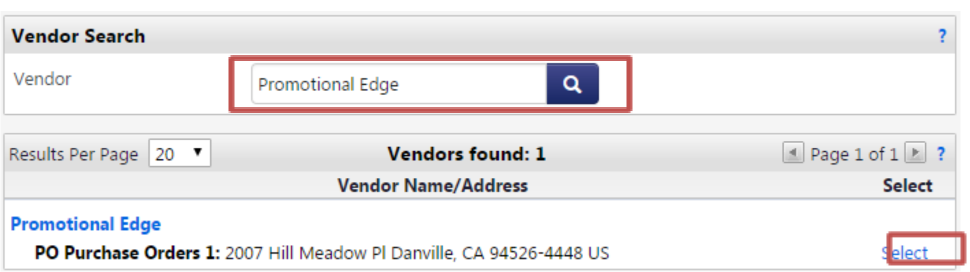
5 Please complete the **Sole Source Justification** if competitive quotes are not attached to orders $5k and over. Please consult USF Procurement Policy for guidance. Formal Sourcing Events (RFx) are required for purchases $50,000 or greater Use the drop down box to select a **Justification Reason**.



6 Enter the **Vendor Information**. Use the search box to search for existing vendors and select the matching vendor.



7 By selecting **Search Existing Vendors**, a new page should appear. Type the vendor name into the search box then click on **Select next** to the first address in the list.

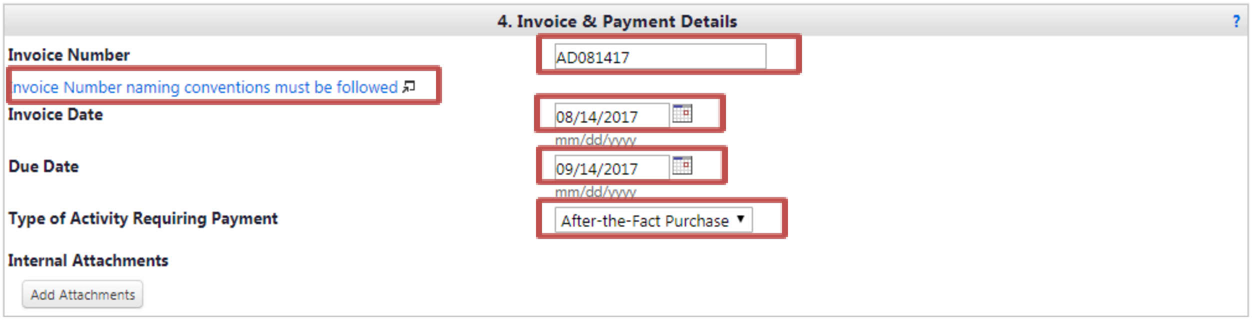


8 Complete the **Invoice & Payment Details** section with the specific details of the payment including:

- **Invoice Number**: 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
- **Invoice Date:** The date the vendor issued the invoice
- **Due Date:** The date the payment is due to the vendor

<table>
<tr><td></td><td>

- **Type of Activity Requiring Payment:** Dropdown list of the type of activity or service being paid



</td></tr>
<tr><td>9</td><td>

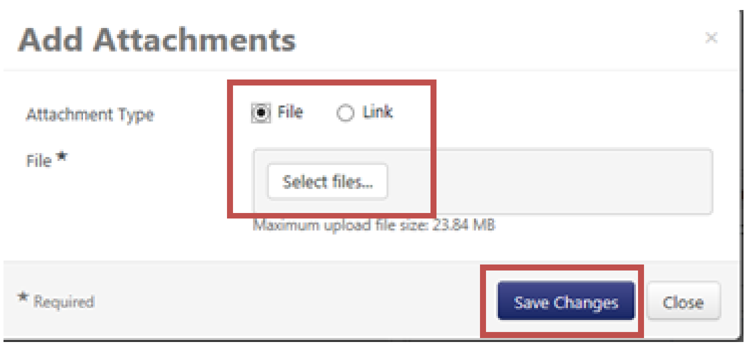
Click the **Add Attachments** to provide a copy of the vendor's invoice, quotes, and supplemental information.

Internal Attachments will remain internal in Hilltop Shop and are **only** viewable to USF employees and should include:

- **Vendor invoice**
- Quotes provided by the vendor
- Internal USF information that is important for approvers to access

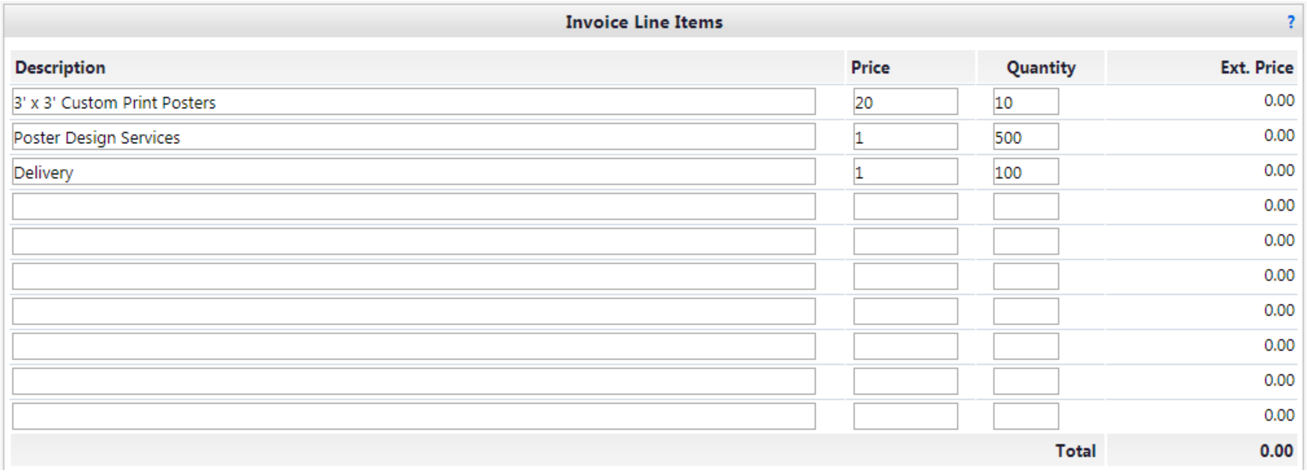
</td></tr>
<tr><td>10</td><td>

Attachments can be added by selecting a file from your computer or by entering a link to a website. Click **Save Changes.**



</td></tr>
<tr><td>11</td><td>

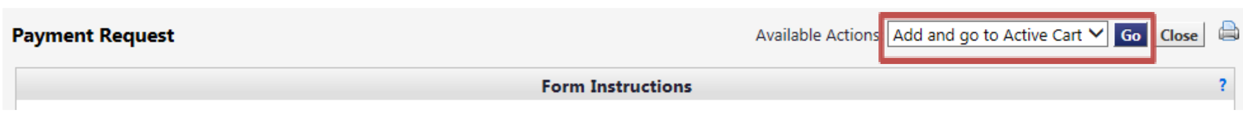
Complete the **Invoice Line Items** section with the **Description, Price, and Quantity** for each line item found on the vendor's invoice.
</td></tr>
</table>



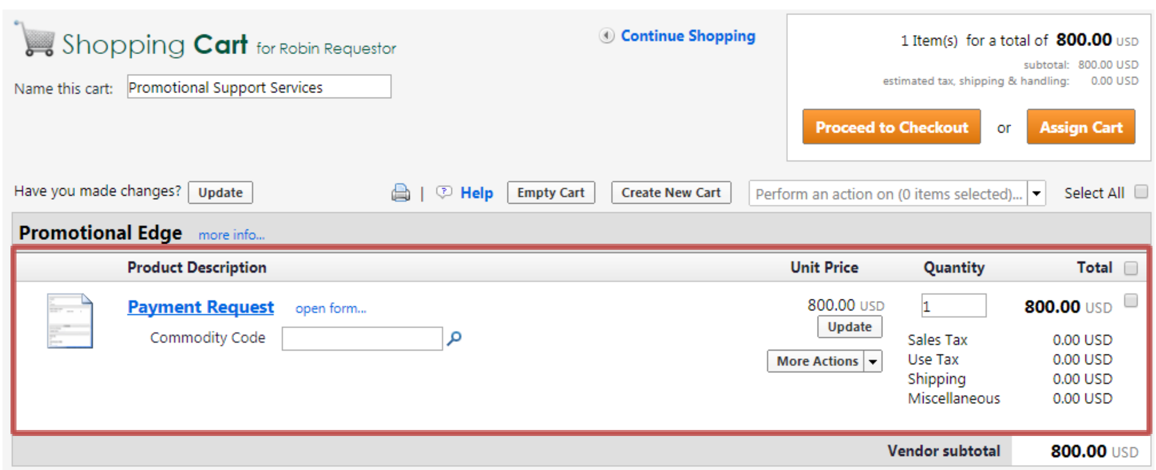
Invoice Line Items

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
			0.00
			0.00
			0.00
			0.00
			0.00
			0.00
			0.00
		Total	0.00

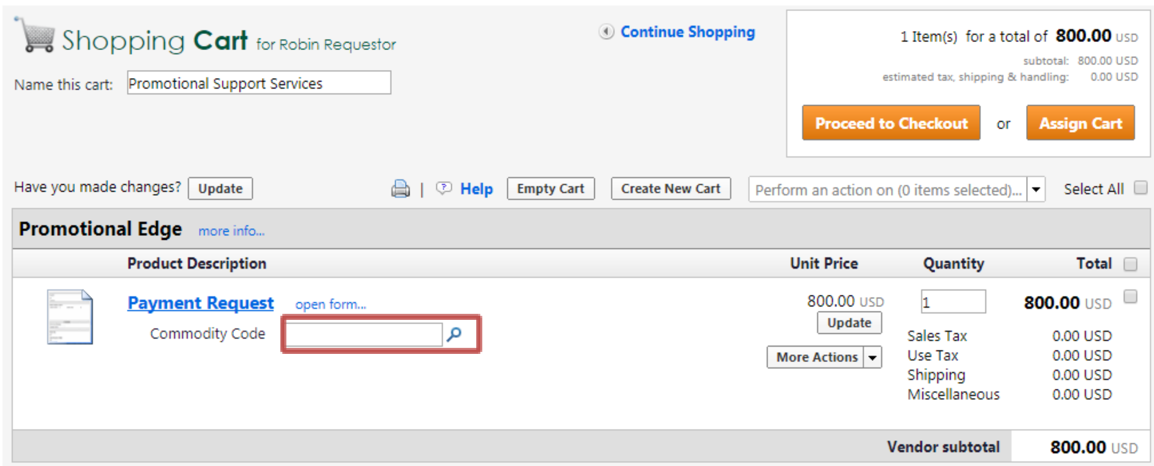
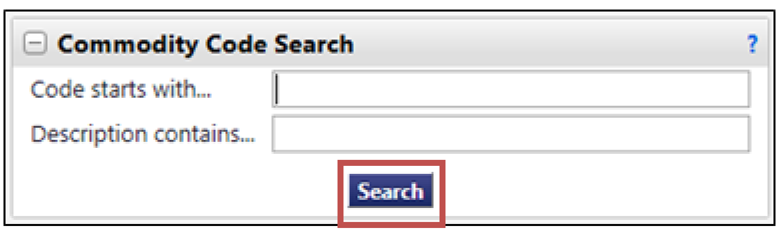
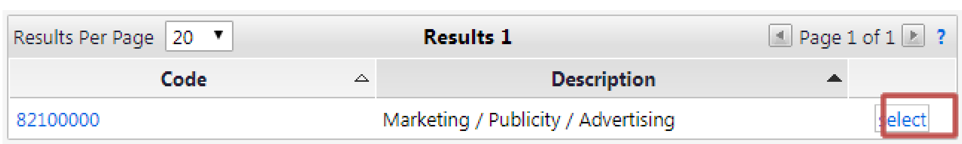
12 Once the form is completed, scroll up to the top of the page and click on the drop down menu next to **Available Actions** in the upper right-hand corner. Select **Add and Go To Cart** and press the **Go** button.

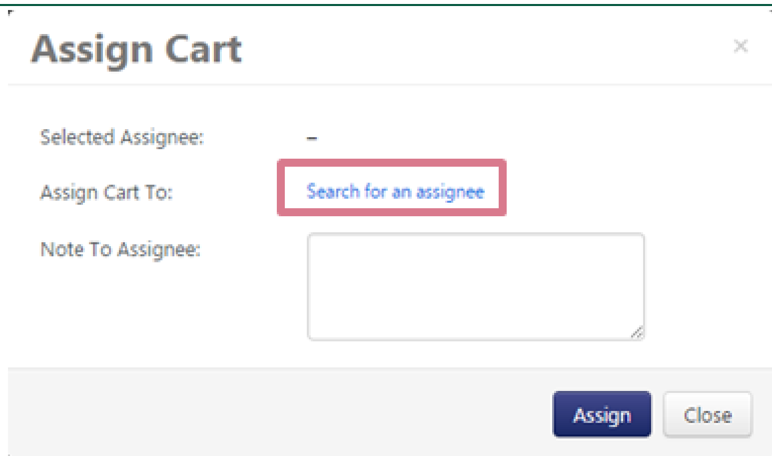


13 The services form should now appear in your active shopping cart.

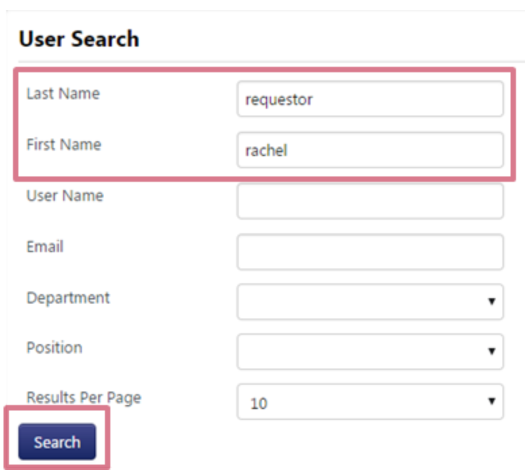


14 Click on the text box next to **Name This Cart** and enter a name for the cart that will be more meaningful to you and any Requestor or Approvers who will need to review your order.

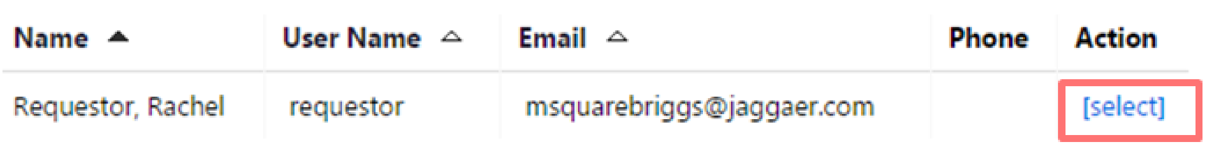
15	**Optional**: Users can update the **UNSPSC Commodity Code** for each line item created from the form. Click on the magnifying glass icon for each line item to add the appropriate commodity code  The UNSPSC Commodity Code **is not required** to submit the form. Purchasing & Ancillary Services (PaAS) will assign the proper UNSPSC Commodity Code that matches the items or services ordered 
16	**Optional:** Search for the UNSPSC Commodity Code by **Code starts with** or **Description contains** and click **Search**.  After finding the correct Commodity Code, click **Select.** Repeat this for each line item in the Shopping Cart 
17	Click the **Assign Cart** button 
18	Click on the **Search for an assignee** link.



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

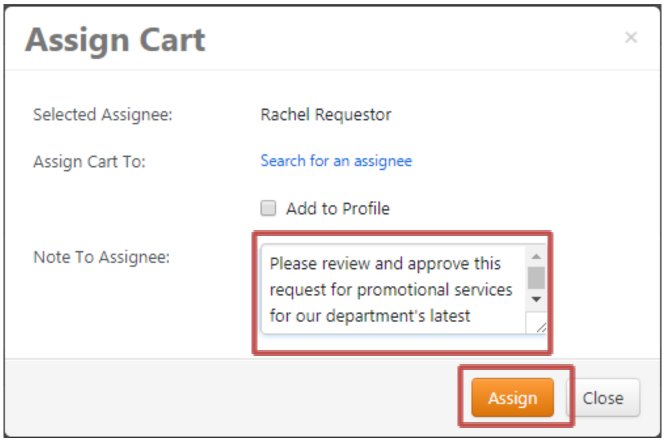
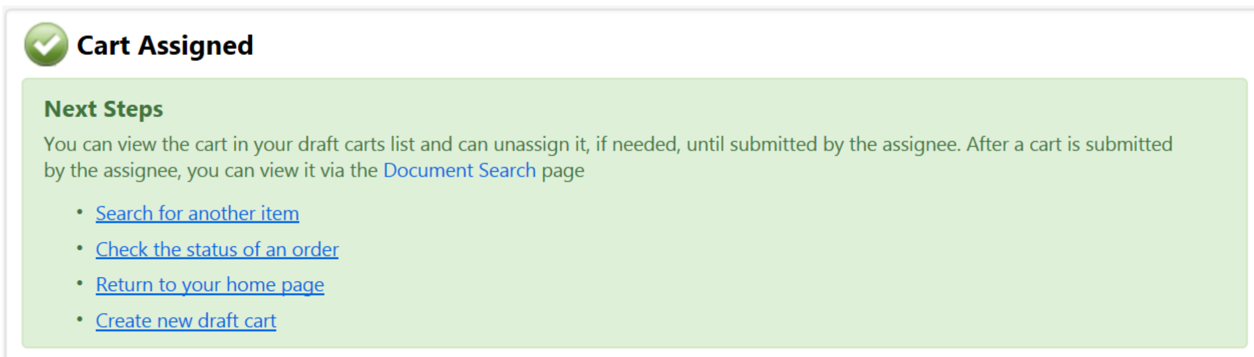


20 Find the name of the Requestor in your department and click **Select.**



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

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

<table>
<tr><td></td><td>
</td></tr>
<tr><td>22</td><td>System message indicates your cart was successfully assigned

</td></tr>
</table>

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

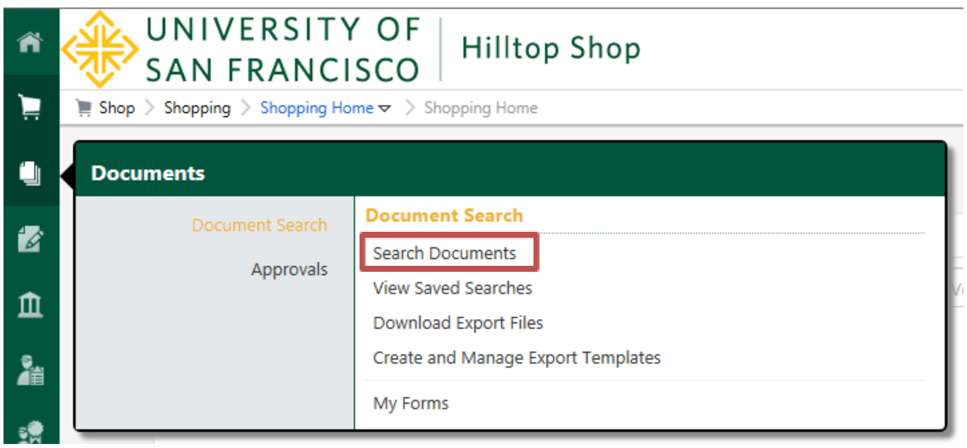
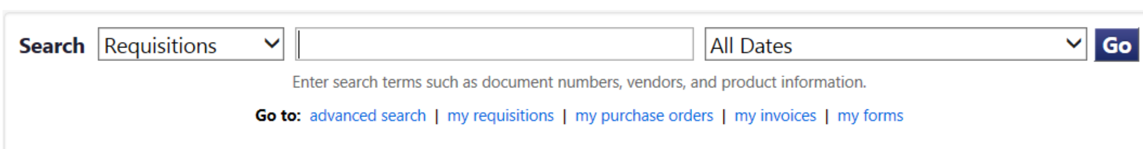
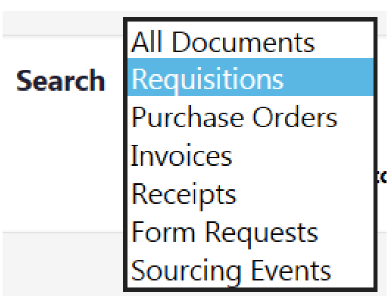
In this set of exercises, you will learn how to utilize Hilltop Shop's Document Search capabilities including the Simple Search, Advanced Search, and Saving Search Results.

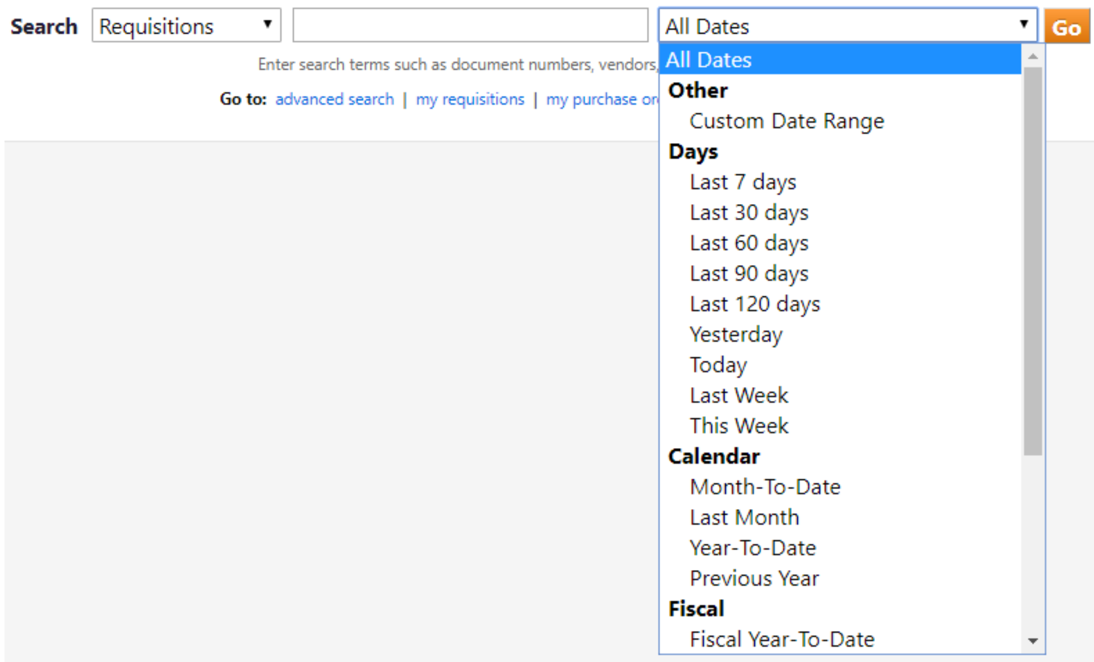
In this section of the course, you learn to perform the following:

- Exercise 9: Simple Search

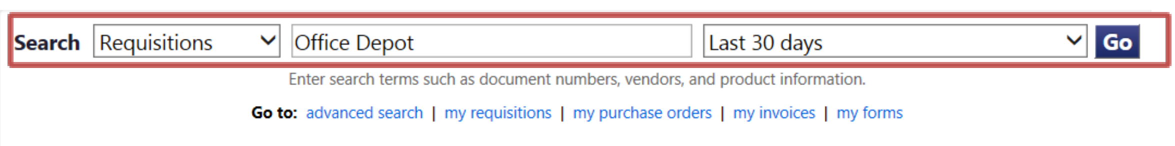
- Exercise 10: Advanced
- Exercise 11: Saving Search Results

Exercise 9: Simple Search

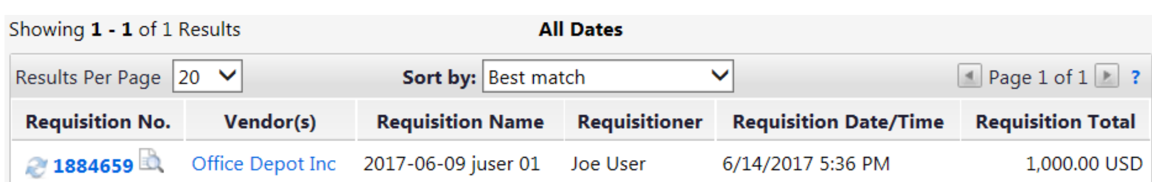
Step	Description
1	Login to Hilltop Shop using the username and password provided to you for training. In production, Hilltop Shop is accessed through myUSF using your username and password.
2	From the Hilltop Shop home page, go to the navigation menu located on the left, click **Documents** > **Document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



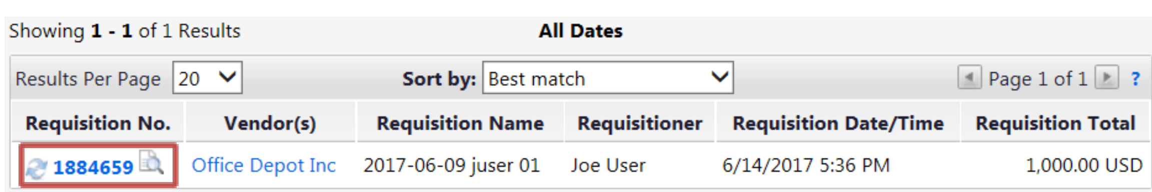
6 Enter your desired criteria and click on the **Go** button



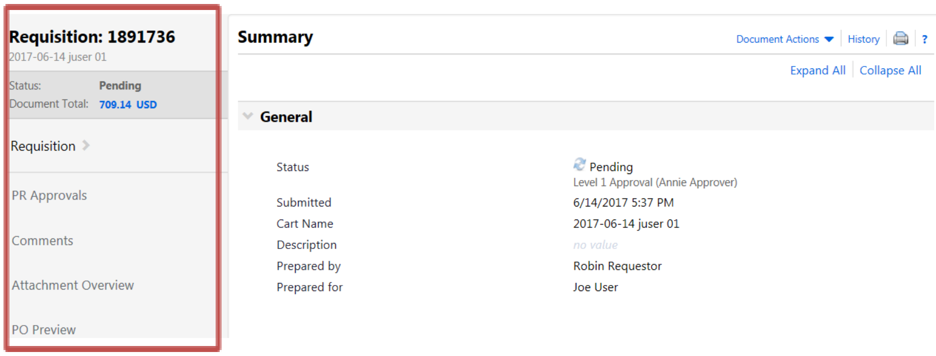
7 The search results will appear with document information including the Requisition/PO/Invoice number, supplier, creation date, settlement status, and total amount.



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

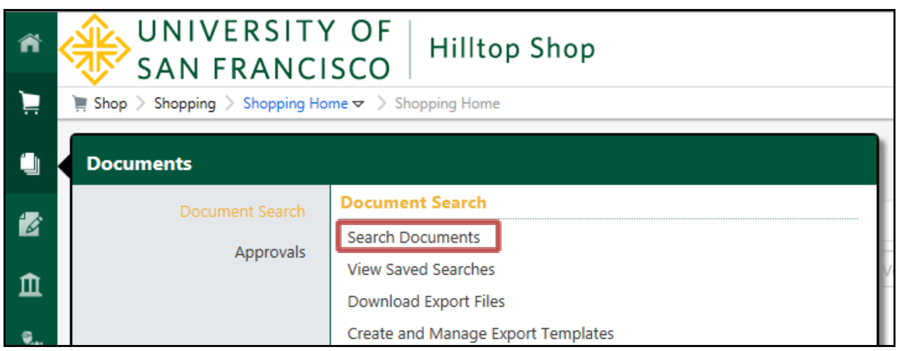


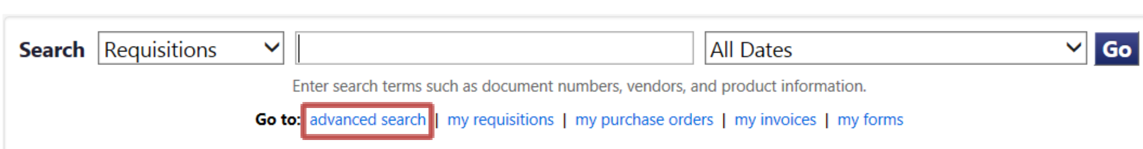
<table>
<tr><td>9</td><td>Document information such as order status, submission date, cart name, document history will appear. Additional document information can be viewed by navigating through the left menu bar

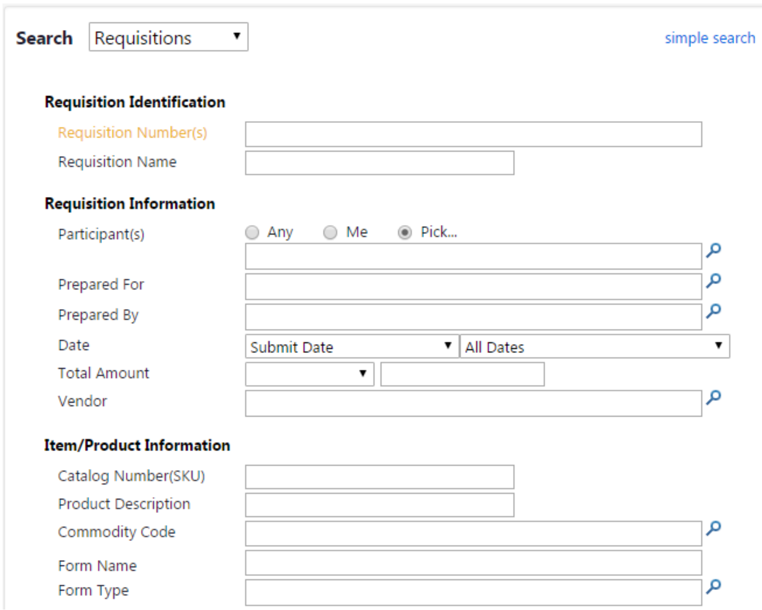

</td></tr>
</table>

Exercise 10: Advanced Search

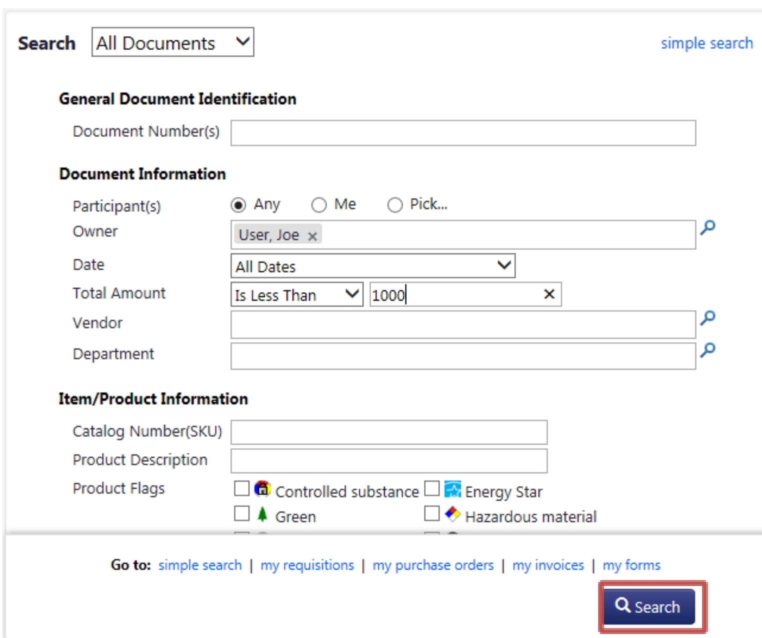
<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>1</td><td>Login to Hilltop Shop using the username and password provided to you for training. In production, Hilltop Shop is accessed through myUSF using your username and password.</td></tr>
<tr><td>2</td><td>From the Hilltop Shop home page, go to the navigation menu located on the left, click Documents > Document Search > Search Documents.


</td></tr>
<tr><td>3</td><td>To conduct an Advanced Search select the Advanced Search link below the search bar.


</td></tr>
<tr><td>4</td><td>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.</td></tr>
</table>

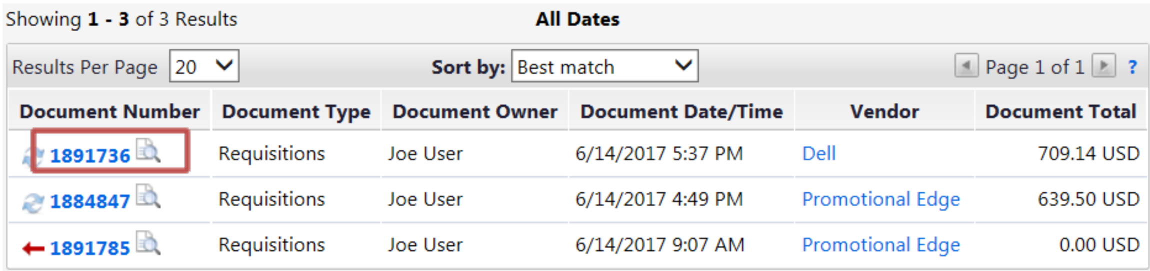


5 Enter the search criteria in the text fields such as document number, document information, and product information. Once you have entered your data element(s), click **Search** to execute the search.

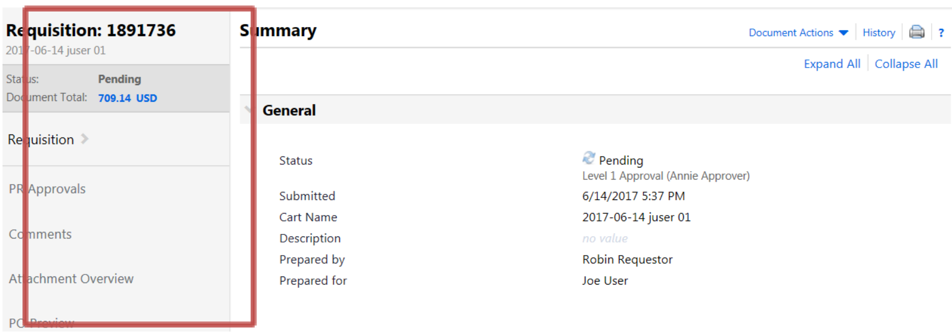


6 The document results should appear, including clickable links to further investigate each document. Click the **document number** for more details.

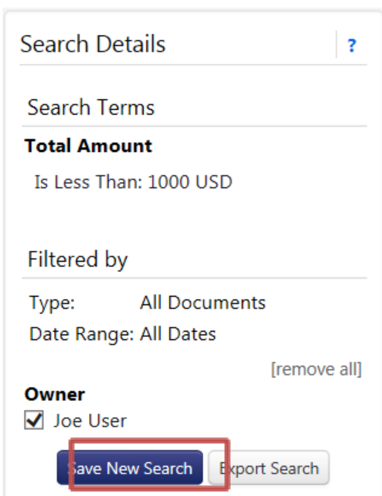
Note: Depending on your role and department in Hilltop Shop, visibility to transactions and certain results may be limited.

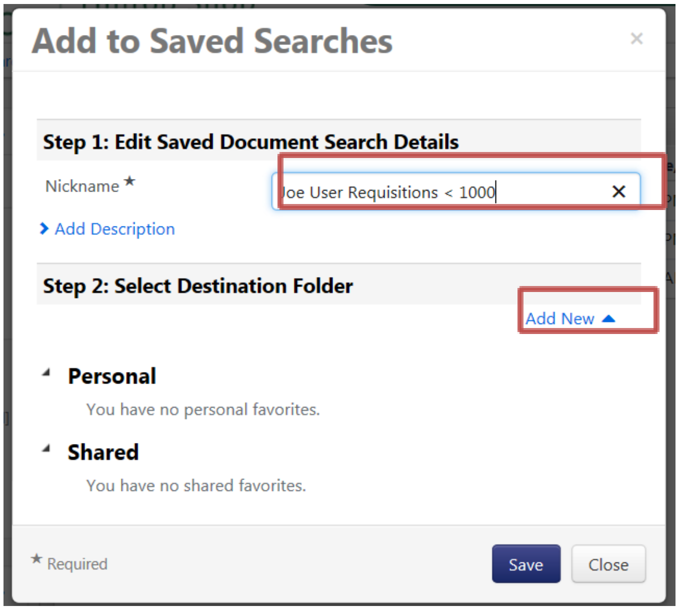
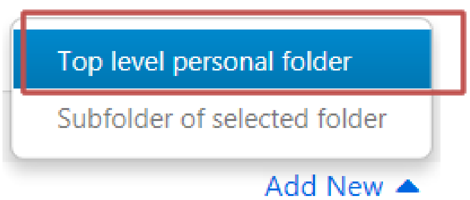
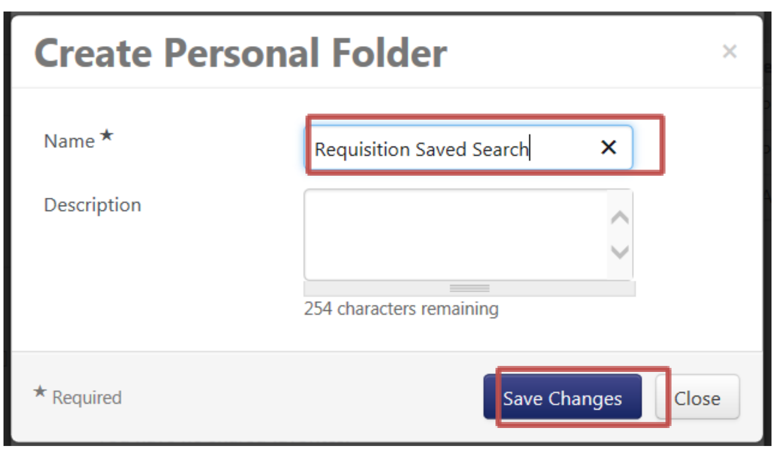


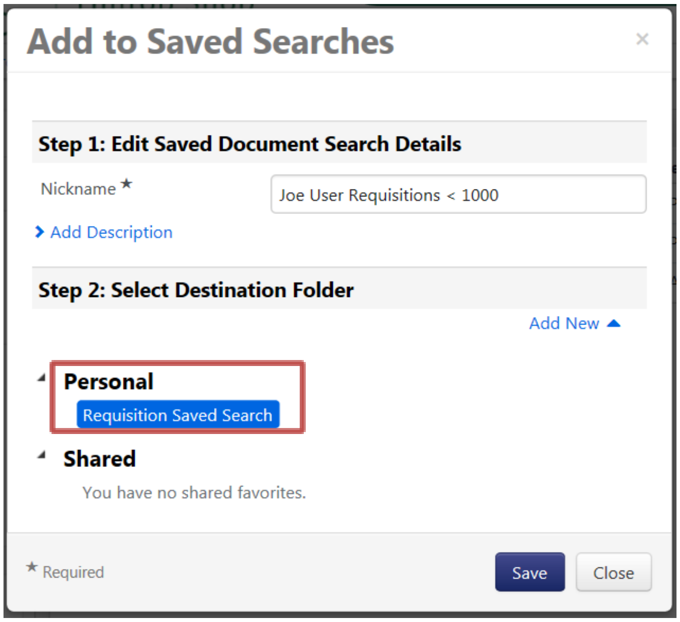
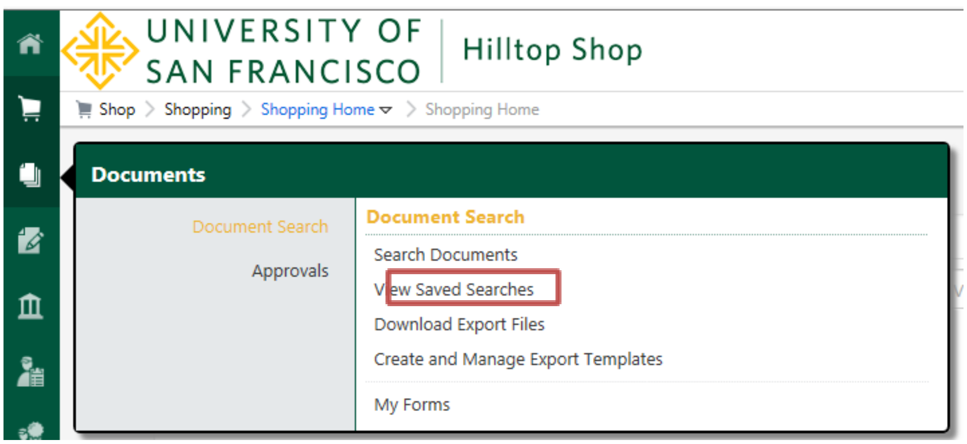
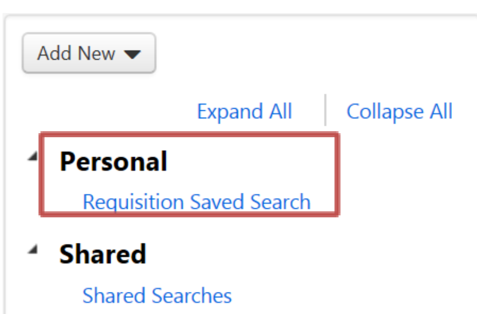
7 Document information such as order status, submission date, cart name, document history will appear. Additional document information can be viewed by navigating through the left menu bar.

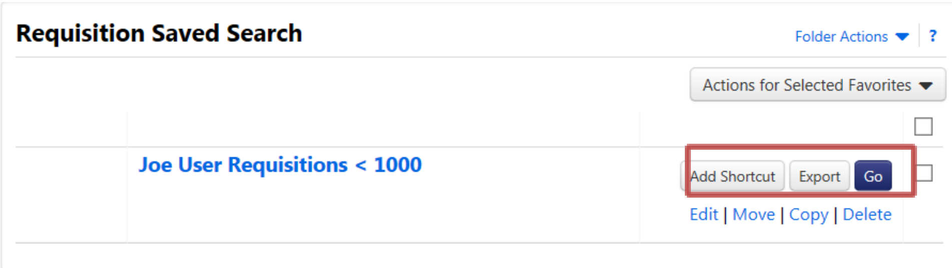


Exercise 11: Saving Search Results

Step	Description
1	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 **Save New Search**. 
2	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.

<table>
<tr><td></td><td>
</td></tr>
<tr><td>3</td><td>Choose a folder structure (personal or shared folder), and a dialogue box will appear.
Personal Folder saves favorite searches that are only visible to just your user account
Shared Folder saves favorite searches that can be shared with other users

</td></tr>
<tr><td>4</td><td>Enter a name for your personal folder and select Save Changes.

</td></tr>
<tr><td>5</td><td>The nickname of the Saved Search as well as the Destination Folder should now appear in the Saved Searches dialogue box, click Save.</td></tr>
</table>

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

	• 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. 

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 if support or additional training is required.