



Spel-Shop

Powered by:

JAGGAER



SITE BASICS
User Guide...

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Objectives

The purpose of this guide is to familiarize users with the basics of working in the Spel-Shop site powered by Jaggaer eProcurement Solution.

- Understand how to access and navigate the application
- Understand user capabilities/permissions
- Understand the key task of document search and export.
- Shopping with a PunchOut vendor
- Shopping with a Non-Catalog vendor
- Assigning a Cart
- Approving a Requisition (PR)

Access and Sign In

User can login to the site by using the MySpelman portal (Single Sign On) or access via an External Application / Jaggaer ERP system

(<https://usertest.sciquest.com/apps/Router/Login?OrgName=Morehouse>).



AUCC Procurement Team

SIGN IN

Please enter the login credentials in the fields below to sign in to the application.
Password is case-sensitive.

..... User Name *

..... Password *

[Forgot your Password?](#)

A User Name and Password will be required. **Note:** Contact Procurement Services if you unable to Sign In.

Users and Roles

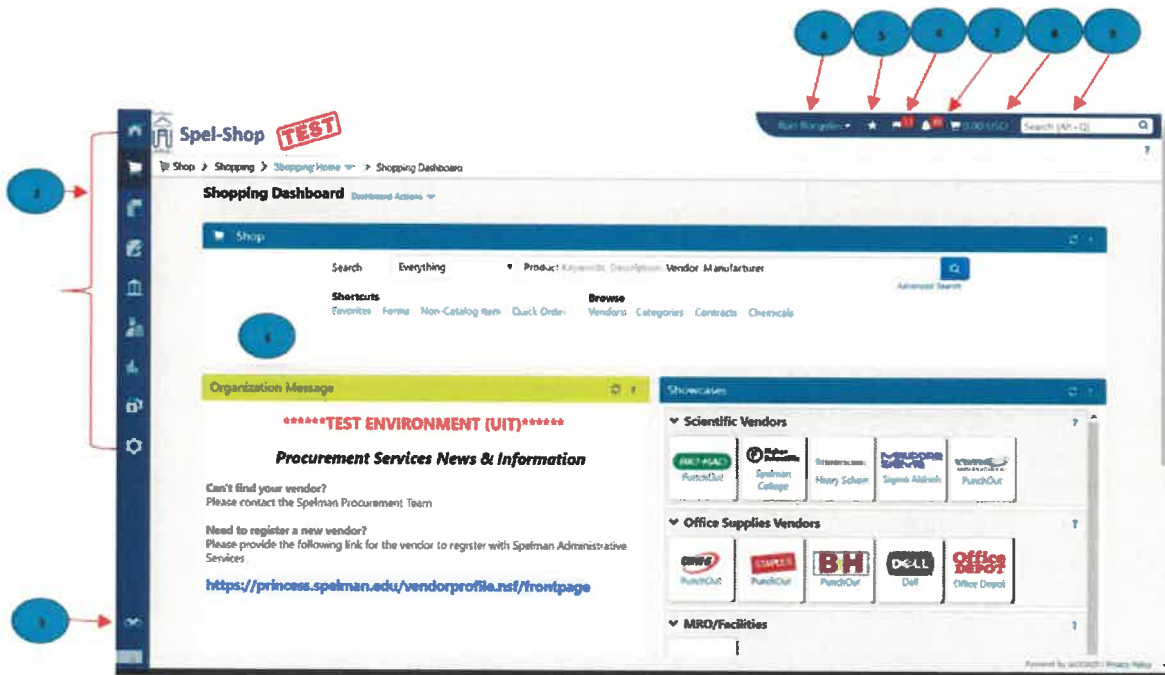
Each user is assigned a username and password to identify who they are, what their permissions are, and other user-specific information. Users can be assigned to a specific role(s) or department, have specific product views, etc. Roles are created to manage users with similar permissions. Each user will have at least a role of a Shopper, Requester, Approver or so on. Users can have more than one role.

Site Navigation

This section focuses navigating the site, including descriptions of the main menu options and options that are available for searching and accessing specific areas of the application. **Important Note:** Your options may vary based on your role and or permissions.

The user interface is designed to provide a clean, intuitive user experience. The site is easy to navigate and provides several features to help you locate and manage your tasks. The menu items and features displayed are dependent on 1) the solutions your organization has purchased, 2) your role, and 3) your permissions.

The graphic below shows various facets of navigation. Read the descriptions following the graphic for more information about each of the navigational components.



1. **Homepage:** This is the page to which the site will default upon log in. The Shopping page displayed (shown in the image above); however, any site page can be configured as the homepage. The

default page can be configured on the organization, role or user level. Clicking on the homepage icon will return you to the homepage from anywhere in the application.

2. Main Menu Options: The menu options displayed depend on the licensed solutions and permissions granted to the individual user. Each menu option contains sub-menu options (which may also sub-menu options). Moussing over a menu option will display available sub-menu options. Like the main menu options, sub-menu options will vary based on licenses and permissions. To select a sub-menu item, simply click on the item and you will be taken to the appropriate area of the site.

3. Menu Search: The Menu Search feature is located below the main menu options on the left side of the screen. This feature allows you to search for specific screens and functions in the application.

4. User Menu: Access to your personal user information and functionality is located in the top banner. Your name is displayed with a drop-down icon to the right. Selecting the drop-down displays menu options including access to your user profile. Additional options may be available to you based on your role(s) and personal permissions.

5. Bookmarks: This feature allows you to save commonly used pages as bookmarks for quick access. You create and access bookmarks from this menu.

6. Action Items: These are tasks that require some action on your part. The Action Items list (located in the top banner) displays all action items assigned to you and may include documents to review, pending your approval, etc. The number of action items is indicated to the right of the menu. Action items are grouped together by task. Clicking on the task group takes you to the appropriate area of the application to complete the action items.

7. Notifications: Notifications are designed to alert you when an activity has taken place or something requires your attention. Notifications can be sent by email but several of them can be accessed from Notifications menu (located in the top banner) in the application. The number of notifications is indicated to the right of











the menu. Notifications are sorted by notification type and newer notifications are highlighted.

8. Cart Preview: Cart Preview allows you to get a quick view of the active shopping cart without having to access the cart in the application. From the Cart Preview you can review the item list, delete an item from the cart and access the active cart. Clicking on the shopping cart icon will display the item list with basic information such as item image, name, quantity and price. From the cart preview you can remove items, access the active cart and/or proceed to checkout.

9. Quick Search: The Quick Search feature allows a variety of searches, such as a document, user profile, a current vendor, etc., to be performed from anywhere in the application. Available searches depend on the user's permissions.


Main Menu Option Descriptions

The table below contains a description for each main menu item. **Important Note:** Menu items displayed depend on your organization's licensed solutions, your role and/or your specific permissions.

	Clicking on the Homepage icon will return the user to the site page that is configured as the homepage.
	The Shop menu contains the menu options related to shopping tasks including product quick search, access to the shopping page, forms and favorites and access to carts and orders.
	The Orders menu provides access to document search and approval-related tasks.
	The Contracts menu is primarily used to access features related to the Contract Lifecycle Management solution. In addition, organizations that manage their hosted catalogs, consortia or org catalog can access those features from this menu.
	The Accounts Payable menu contains all tasks related to Accounts Payable solution, including invoice management and AP administration.
	The Vendors menu contains all tasks related to the configuration and management of your organization's vendors/suppliers.
	Reports are accessed from the Reporting menu. The sub-menus are organized by report type and there is a separate sub-menu for downloading report extracts and exports. The Reports menu also provides access to the Spend Analytics (Spend Radar) solution.
	Tasks related to the administration of the site are located in the Administer menu. The most commonly used Administer option is user management. Other sub-menu options including shopping settings, find and fix errors, managing imports and accessing self-help tools.
	The Setup menu contains all tasks related to configuring the site. This includes workflow setup, hosted catalog configuration, general site settings, site appearance and behavior and user communications.
	Menu Search is a keyword search that returns a list of pages containing that keyword. Search results are clickable and take you directly to the page.

Menu Search allows you to locate menu items and functions without having to navigate through the interface. This feature is useful for accessing site pages when you are unsure of the location in the navigation menu or the specific name of a menu.

Step-by-Step

1. Access Menu Search in one of the following ways: > Click on the Menu Search icon  on the side navigation bar or use the quick-access key combination Alt + M.
2. The Menu Search field displays. Begin typing the search term in the search field. A list of menus and screens that match the search term will display below the search field as you type. The display includes the menu/screen name and breadcrumbs that show you

the navigation path. You can use the up or down arrow keys on your keyboard to scroll through the options.




3. Locate the appropriate menu or screen in the list and click on it. You will be taken to that screen.


Managing Page Bookmarks Menu

This feature allows you to create and access bookmarks for commonly used pages. This is useful for accessing pages quickly without having to use the menu search or navigate through the site.

Accessing the Bookmarks

Click on the **Bookmark**  icon in the top banner or Use the quick-key access combination **Alt + K**


Saving a Page as a Bookmark

1. Go to the page you would like to bookmark.
2. Click on the **Bookmark**  icon in the top banner. The **My Bookmarks** menu will display.
3. Click **Bookmark this page**. The page will be saved as a bookmark. You can rename the bookmark by clicking the **Edit** button and typing over the bookmark name.

Accessing a Page from a Bookmark

1. Access the **Bookmarks** menu.
2. A list of your bookmarks will display. Locate the bookmark for the page you want to access and click on it. You will be taken to the appropriate page.

Removing, Renaming or Re-ordering Bookmarks

1. Access the **Bookmarks** menu.
2. Click **Edit**.
 - To rename a bookmark, click the  icon. Type over the existing name and then click the **Done** button.

- To remove a bookmark, click on the  or  icon to the left of the bookmark name.

Using Quick Search

The Quick Search feature allows a variety of searches, such as vendor profile, user profile, etc., to be performed from anywhere in the application.

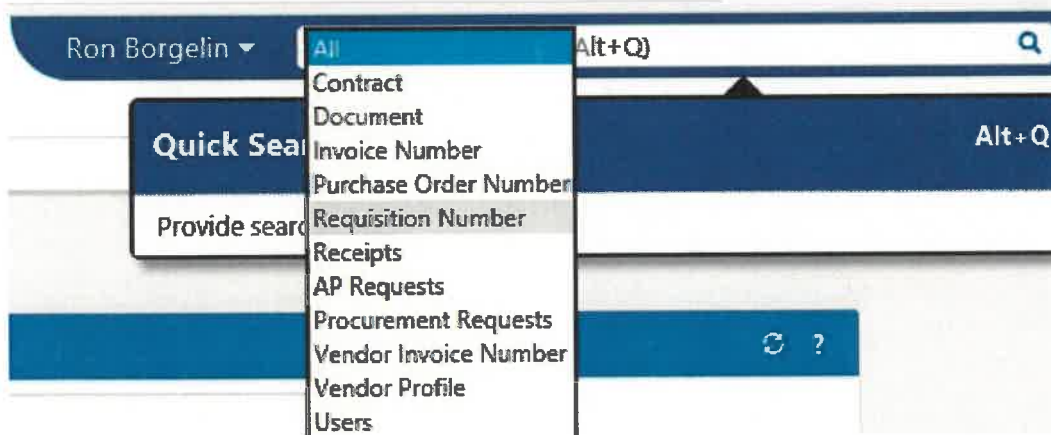
Step-by-Step

Access Quick Search in one of the following ways:

Click on the Quick Search icon  on the top banner or use the quick-access key combination Alt +Q for a list of options displayed. You can use the up or down arrow keys on your keyboard to scroll through the options.

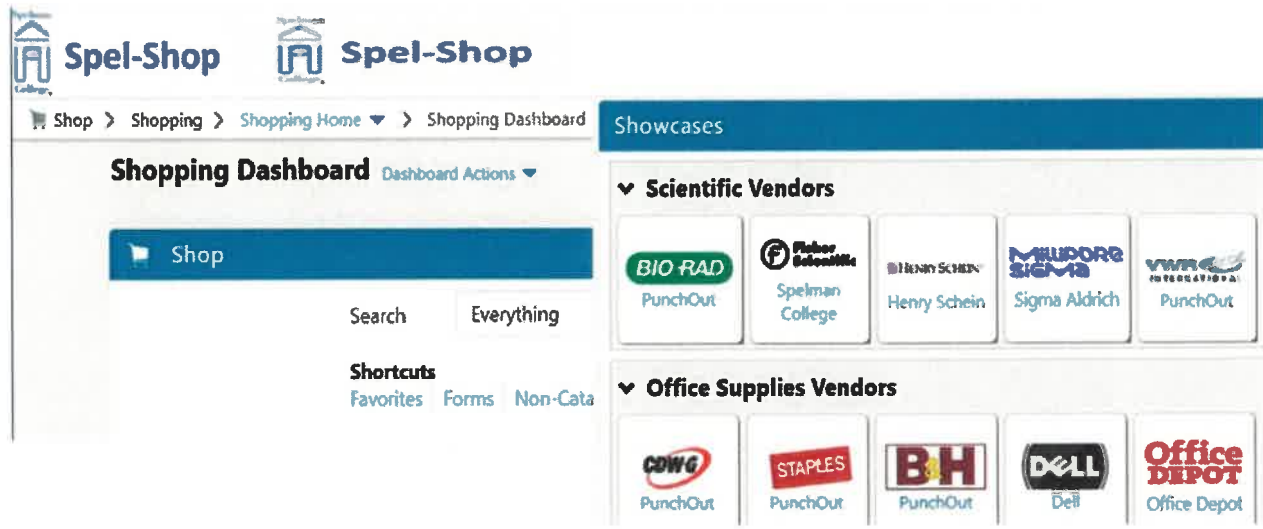
1. The Quick Search displays. In the drop-down menu, select the type of search you would like to perform.

- ✓ **All:** Select this search type to search by keyword or document number across all search types. or click on the drop-down to select any of these types below



Once you click on the appropriate option. You will be taken to the area of your search.

Shopping through a PunchOut Vendor



1. On the Spel-Shop homepage, click on your desired vendor's PunchOut icon. You will be redirected to the vendor's website.
2. Shop and create a cart as you normally would for any online purchase.
3. Click on "Check Out or Submit Order." This will redirect you back to Spel-Shop.
4. Click on "Proceed to Checkout" button at top right of your screen.
5. Be sure to fill out these required fields: Shipping, Billing, Accounting Codes. You may attach/upload any attachment and include any Internal or External Notes as necessary or applicable to your order.
6. Do a final review of everything, making sure quantities and prices look correct, then submit the requisition (PR) for approval.

Shopping with a Non-Catalog Vendor

Non-Catalog Item ? X

Enter Vendor

or
Vendor Search

Product/Service Description	Catalog No.	Quantity	Unit Price	UOM
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	EA

254 characters remaining expand | clear

Product Details

- Controlled substance
- Recycled
- Hazardous material
- Radioactive
- Rad Minor
- Select Agent
- Toxin
- Energy Star
- Green

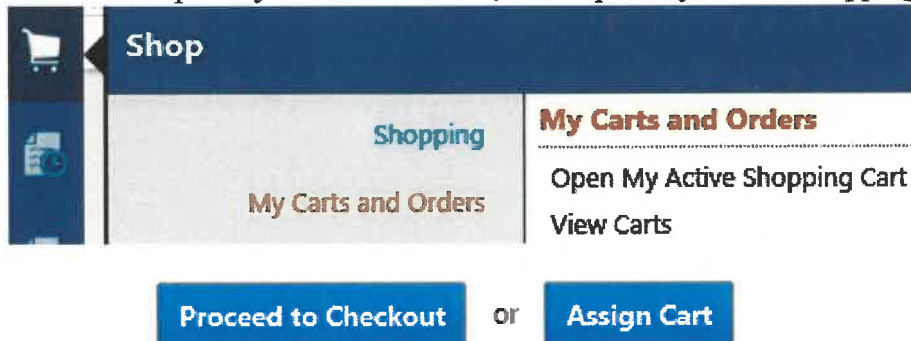
Save and Close Save and Add Another Close

1. On the Spel-Shop homepage, click on “non-catalog item,” which is found under the center search bar. This will pull up a pop-window.
2. Select your desired vendor (Vendor must be a Spelman College approved vendor). Need to register a new vendor? Follow the link for vendor to register with Spelman Administrative Services or Can't find your vendor? Please contact the Spelman Procurement Team.
3. Type the Product Description for the item title, along with any pertinent details, such as color and size.
4. Type the Catalog No., as found on supplier’s website or quote.
5. Type the Quantity, Unit Price, Unit of Measure (UoM) then click on “Save and Close,” to add to your cart.
8. Once finished, click on the cart icon at the top right of your Spel-Shop screen. You can choose to view your cart, or begin the checkout process.
9. Complete checkout process as you would with a PunchOut order. If you have a quote for the order, be sure to add it as an External Attachment to the requisition (PR).

Assigning a Shopping Cart

All faculty and staff at Spelman College have access to Jaggaer/Spel-Shop through their mySpelman portal. This does not necessarily mean that every user can submit a requisition. To submit a requisition, you must have Banner access to the budget you wish to charge. If you do not have this access, you will need to assign your cart to your Administrative Assistant to process the order on your behalf.

1. Click on Shop > My Carts and Orders, then Open My Active Shopping Cart



2. Click on Assign Cart to select the user or Admin Assistant to finalize the order

Assign Cart: User Search

Select from profile values ⓘ Search for an assignee

Select from profile values ⓘ

Note To Assignee:

Assign

Close

Approving a requisition (PR)

Go to the approval section or click on the flag icon at the top of the Spel-Shop homepage. This will take you to the Action Items page.

- a) Click on the requisition number.
- b) Review the order to make sure it looks appropriate.
- c) On the top right corner, there is an Available Actions dropdown menu, set it to “Approve/Complete Step” and click on the “Go” button.



Viewing Order Status and History

To view the status of your order, click on Shop > My Carts and Orders, then View My Orders



Shop > My Carts and Orders > View My Orders (Last 90 Days) > Document Search

Start New Search

Showing 1 - 23 of 23 Results Last 90 days (10/3/2019-12/31/2019)

Results Per Page: 500 Sort by: Best match Page 1 of 1

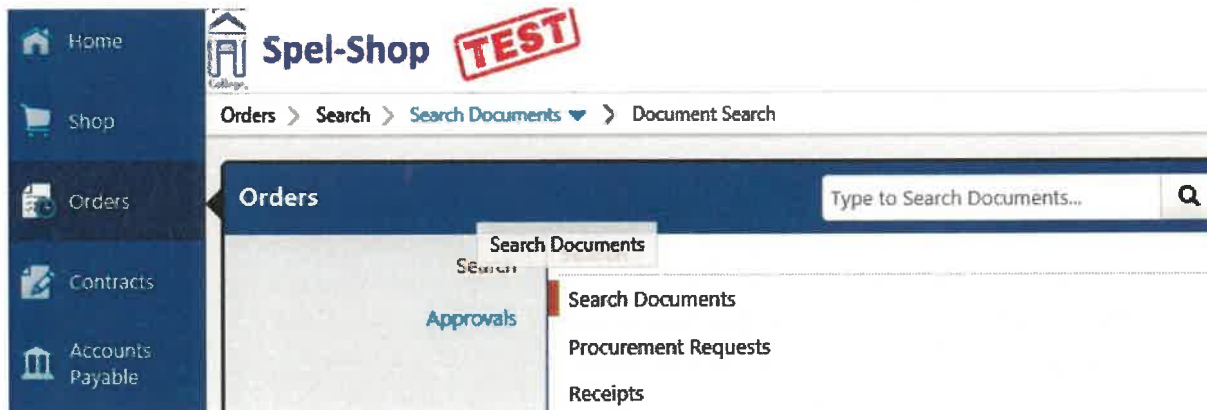
Requisition No.	Vendor(s)	Requisition Name	Requisitioner	Requisition Date/Time	Requisition Total
✓ 2845083	John Dabney	2019-12-06 rborgelin 01	Ron Borgelin	12/19/2019 9:26 PM	125.00 USD
✓ 2834792	Jim N Nick's Bar B Q	2019-11-21 rborgelin 02	Ron Borgelin	11/21/2019 2:59 PM	259.50 USD
✓ 2832573	Staples Business Advantage	2019-11-19 rborgelin 02	Ron Borgelin	11/21/2019 11:51 AM	63.00 USD
✓ 2832401	Staples Business Advantage	2019-11-19 rborgelin 01	Ron Borgelin	11/19/2019 12:03 PM	40.60 USD
✓ 2825515	Office Depot	2019-11-13 rborgelin 01	Ron Borgelin	11/15/2019 10:35 AM	75.59 USD
✓ 2815445	Office Depot	2019-11-06 rborgelin 04	Ron Borgelin	11/13/2019 1:34 PM	74.69 USD
✓ 2815442	CDW LLC (formerly CDW Government, Inc.)	2019-11-06 rborgelin 03	Ron Borgelin	11/6/2019 1:39 PM	395.01 USD
✓ 2815201	Source Office Products	2019-11-06 rborgelin 02	Ron Borgelin	11/6/2019 10:30 AM	99.01 USD
✓ 2815159	Henry Schein, Inc.	2019-11-06 rborgelin 01	Ron Borgelin	11/6/2019 10:07 AM	180.39 USD
✓ 2814040	VWR Scientific Products	2019-11-05 rborgelin 03	Ron Borgelin	11/5/2019 4:33 PM	493.16 USD
✓ 2813991	Staples Business Advantage	2019-11-05 rborgelin 02	Ron Borgelin	11/5/2019 4:09 PM	34.35 USD
✓ 2813980	W. W. Grainger	2019-11-05 rborgelin 01	Ron Borgelin	11/5/2019 3:46 PM	427.64 USD
✓ 2805497	Office Depot	2019-10-30 rborgelin 01	Ron Borgelin	11/4/2019 3:03 PM	30.72 USD
✓ 2803689	Source Office Products	2019-10-29 rborgelin 01	Ron Borgelin	10/29/2019 11:28 AM	59.90 USD
✓ 2798335	CDW LLC (formerly CDW Government, Inc.)	2019-10-24 rborgelin 01	Ron Borgelin	10/29/2019 11:09 AM	122.99 USD

Exporting Document Search

You can export a document search for reporting and analysis purposes. Exports can be performed directly from the document search results or from a saved search.

Step-by-Step 1. Use one of the following methods to access and export document search results.

Navigate to Orders > Search > Search Documents >



Then...

Search All Documents simple search

General Document Identification
Document Number(s)

Document Information
Participant(s) Any Me Pick...
Owner
Date All Dates
Total Amount
Vendor
Department
Business Unit

Item/Product Information
Catalog Number(SKU)
Product Description
Product Flags
 Controlled substance Energy Star
 Green Hazardous material
 Rad Minor Radioactive
 Recycled Select Agent
 Toxin

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

Make your selection to perform a document search. Click on the Search button then the export will be executed.

On the results page click on the **Export Search** button located in the Filtered By on the top-left side of the screen to export the search.