



# Buyer's Guide

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

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## Logging In

To log into Unimarket, take the following steps:

1. Open your web browser.
2. In the address field, type <https://siena.unimarket.com>. (Production)  
or type <https://siena.unimarket-demo.com> (Demo/Test).
3. The Siena Marketplace/ Unimarket login page will appear.
4. Enter your Siena College SSO username and password and login.
5. Your Siena Marketplace/ Unimarket home page will appear.

If you experience any issues logging in, please contact [purchasing@siena.edu](mailto:purchasing@siena.edu)

## The Buyer Role in Unimarket

The Buyer role in Unimarket is assigned to specific users who have the authority to submit requisitions for approval using the organization's funds based on the finance Chart of Accounts. Buyers in the Unimarket eProcurement system have the following permissions:

- Access suppliers in the online marketplace created specifically for your institution.
- Search and browse the contracted pricing catalogs from the available suppliers.
- Fill an individual shopping cart for checkout.
- Accept and process requests from other users (Buyers or Browsers) in the department that do not have authority to route requisitions for approval.
- Create requisitions for purchases against the organization's Chart of Accounts.
- View the status and approval path of requisitions.
- View and export reports on purchase orders.

## The Browser Role in Unimarket

The Browser role in Unimarket is assigned to specific users who have the authority to shop and build a shopping cart. The Browser can begin the requisition process but must reassign the Incomplete Requisition to someone within their Organization Unit to complete the Checkout process and route it through Approvals. Browsers in the Unimarket eProcurement system have the following permissions:

- Access suppliers in the online marketplace created specifically for your institution.
- Search and browse the contracted pricing catalogs from the available suppliers.
- Fill an individual shopping cart for checkout.
- Begin the creation of requisitions for purchases
- View the status and approval path of requisitions.
- View and export reports on purchase orders.




## My Account Settings

When you initially log into Unimarket it is recommended that you check your account details. You can find the My Account page under the silhouette of a person at the top right of the screen. Within the My Account page you can update your preferred first and last name, phone number,

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email, default your GL Accounting string or a segment thereof, default your login landing page, and set your default shipto location. Setting segments of your default GL Accounts will make the checkout process more efficient if you use the same accounting segments repeatedly. It is NOT recommended that you set all parts of the GL Account as a default as you may forget to change the Account for different types of purchases.

User Details
Out of Office
Settings

 0



**Buyer 1**

My Account

Out of Office

Help

Diagnostics

### User Details

Username

First Name

Last Name

Code

Phone Number

Ext.



Email

### My Settings

Default Account Code

COAS

9 — FUND — ORGN — PROG — ACCT — ACTV — NSF



 Clear Account Code  Load Default Account Code

Set Login Landing Page

Default Location

**Save**

## Key Concepts

- There are two types of suppliers found in Unimarket:
  - **Catalog (Premium) Supplier** – supplier who has a catalog in the Unimarket marketplace or provides roundtrip/punchout access to their ecommerce site from Unimarket.
  - **Non-Catalog Supplier** – supplier who does not have a hosted catalog on Unimarket or provides roundtrip/punchout access to their site and instead requires products to be manually created in Unimarket.
- There are two methods in which to order products from a supplier:
  -  **Hosted/Standard Catalog** – supplier products are “hosted” on the Unimarket website, meaning you do not leave the Unimarket website to search and order these products. Hosted Catalogs are identified with the folder icon.
  -  **Roundtrip/Punchout** – supplier products are found on the supplier’s ecommerce website with a direct link to and from Unimarket. A Roundtrip/Punchout catalog features the circling arrow icon. Once clicked, a new window or tab will open in your internet browser and you will be signed into the appropriate user account on the supplier’s ecommerce site.
  - **Non-Catalog Items** – products that require their information to be entered manually in the Unimarket portal. Even Premium Suppliers may have products that can be entered manually if a product is not found in any of their catalogs.

# Searching

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

## Product Searching

Complete product searches using the search function in the title section of Unimarket. Use the search field to find loaded catalogs, index catalogs (products pointing to a punchout site), or supplier keywords. This search field will also search for supplier names. To search in this method, complete the steps listed below:

1. From the title section, type the product name or keyword search term in the search field.



The image shows a search bar with a dropdown menu on the left showing 'All' and a search icon on the right. The text inside the search bar is 'Search marketplace...'. The search bar is highlighted with a black border.

2. Click **Search**.
3. Any products, supplier names, or keywords that match the criteria will appear in the search results.

## Searching Tips

- Search terms can be combined using the words **AND** and **OR**.
  - **AND** will search for both words/phrases.
  - **OR** will search for one word/phrase or the other.
- Wildcard searches can be performed if the exact search word/phrase is unknown.
  - **?** will replace a single character; i.e. "Te?t" could be Test or Text.
  - **\*** will replace multiple characters; i.e. "Test\*" could be Tester or Testing.

Any products that match the criteria will appear in the search results.

**NOTE: Results will not return products from roundtrip suppliers unless they have additional search functionality enabled such as an "Index Catalog".**

## Supplier Searching

If you are searching for a specific supplier, there are multiple ways to locate the supplier.

- Like Product searches you can use the same search bar to find Suppliers

- From the Marketplace, you can search for suppliers by Name, Search Term and ERP

Vendor ID. Suppliers


**Note: Search Terms must be added by an administrator for them to be available.**

- You also can view only your “Favorite” Suppliers by toggling on the option for “Favorites Only”. This will show you only the vendors who are the most frequently used by you or those you’ve selected to be your favorite by clicking on the “heart icon” on the vendor card.
- **Guided Buying** is another way to search for vendors who have been given a tag to help curate them into specific categories.






# Filling your Shopping Cart

## Shopping by Hosted Catalog

After clicking on a Supplier's name or icon, select the hosted catalog folder icon (  ) for a supplier's hosted catalog on Unimarket. The supplier may have multiple catalogs that appear.

1. Click on the **supplier catalog** that you wish to shop.
2. The products available within the catalog will appear.

Products and Services 7 listings. List  Sort by

	<b>Travel Mouse (RH304AA)</b> <small>Keywords: HP, Hewlett, Hewlett, Hewlett-Packard, Computer, Desktop, Laptop, Notebook, Wired, Mouse            Shipping: Manual Order Delivery</small>	<small>Hewlett-Packard Co</small> <small>♡ Add to List</small> \$13.00 / Each <input type="text" value="1"/> <b>Add to Cart</b>
	<b>65W Smart AC adapter (ED494AA)</b> <small>Keywords: HP, Hewlett, Hewlett, Hewlett-Packard, Computer, Laptop, power, Business, Notebook            Shipping: Manual Order Delivery</small>	<small>Hewlett-Packard Co</small> <small>♡ Add to List</small> \$25.00 / Each <input type="text" value="1"/> <b>Add to Cart</b>
	<b>Full size keyboard &amp; mouse bundle (RC465AA)</b> <small>Keywords: Wired, Keyboard, OMERTY, Numeric, HP, Hewlett, Hewlett, Hewlett-Packard, Computer, Desks...            Shipping: Manual Order Delivery</small>	<small>Hewlett-Packard Co</small> <small>♡ Add to List</small> \$27.00 / Each <input type="text" value="1"/> <b>Add to Cart</b>

3. Browse items individually or use the search bar to search within the selected catalog.
4. The sort by option defaults to the relevant search term Name. Sort by can be changed to Code, Lowest Price, or Highest Price.
5. Click on the product title or product image to provide more information about the product.
6. When you have decided on a product to order type the quantity in the Quantity field to the left of the Add to Cart button.

Qty  **Add To Cart**

7. Click the **Add to Cart** button.
8. A confirmation message will appear, and the shopping cart will update to reflect the total number of products.

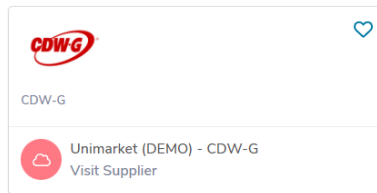


9. Repeat steps 3 through 9 for as many products as you need from this supplier.

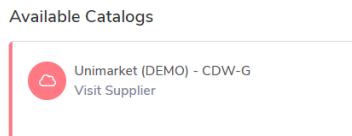
## Shopping by Roundtrip Catalog (Punchout)

The cloud icon  sends you to the supplier's website and logs into your organization's pricing catalog.

1. Click the **supplier** that you wish to shop from the marketplace.



2. Click the **roundtrip icon** or **supplier name** to go to the supplier's website.

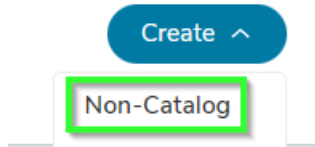


3. Each supplier's website will be different. Browse and search for products as if you had come to the supplier's website directly.
4. Add products that you wish to order on the supplier's website by clicking the **Add** button.  
**NOTE: The terminology of the button to click will vary based on the supplier's website.**
5. When finished shopping, click the **Checkout** or **Submit Requisition button** to return to Unimarket.  
**NOTE: The terminology of the button to click will vary based on the supplier's website.**
6. You will be returned to your shopping cart in Unimarket with the products you had selected. The additional tab or browser window that opened for the supplier's punchout site should close automatically. If this does not happen, consult your admin or IT support to look at your browser settings.

## Shopping with Non-Catalog Items

If a supplier does not provide a catalog, you will need to create a Non-Catalog Item. You will need to enter the product's information in the Non-Catalog form.

1. Click the **supplier** that you wish to shop.
2. Click the **Create a Non-Catalog Item** link to enter the product's details.



3. Type in the product information.

NOTE: Fields marked with a red asterisk are required fields

- a. **\*Item Name** – will be filled in from your previous entry
- b. **\*Quantity** – enter the desired quantity
- c. **\*Unit Price** – type in the single unit price of the product.
- d. **\*Unit of Measure** – type in the Unit of Measure or select from the drop-down list.  
Each (EA) is the most common unit of measure.
- e. **Description** – description of the product to ensure the supplier knows what you are ordering. The more detail, the better to ensure order accuracy.
- f. **Product Code** – supplier's product number or SKU.
- g. **Category** – These are the UNSPSC international standard commodity codes. Type in the category code or select it by starting to type a commodity and selecting from the dynamic list that will appear.
- h. **Manufacturers Part ID** – If the supplier is a reseller, you may enter the additional product ID number that refers to the manufacturer's product.

## Create a Non-Catalog Item

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Supplier  
CDW-G x v

\*Item Name

Quantity  
1

\*Unit Price ?

Unit of Measure  
Each v

Optional Details

Description

Product Code ?

Category

Manufacturer Part ID ?

**Add to Cart** Cancel

4. Click the **Add to cart button**.
5. You will be returned to the Create a Non-Catalog Item product screen to enter the next product line and a notification on screen will let you know that the product was added to your cart.

✓ Added item 'HDMI Cable' to your cart.

6. Repeat steps 3 through 5 for each product line that you wish to order.


# Shopping Cart

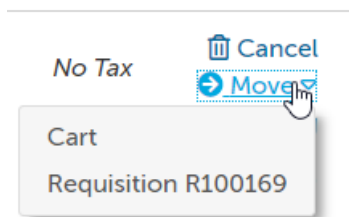
The shopping cart appears in the header bar at the top of the page. The number of products will appear in the cart.

## Reviewing the Shopping Cart


1. Click the **shopping cart icon** to view the products that have been added to your shopping cart.



2. All products in the cart will appear by supplier with an individual supplier total.
3. To adjust the quantity of any product, type the new quantity into the Quantity field of the product. The line item subtotal will update as you go. Quantities for items that came from a Punchout Catalog should not be adjusted. To add additional quantities please return to the Punchout Catalog and retrieve additional items.
4. To remove any product from the cart, click the **Remove icon**  **Remove** next to the Quantity field.
5. To remove all products from the cart, click **Clear Shopping Cart** in the upper right-hand portion of the screen.
6. The **Move** button will allow you to move the product from your cart to a saved or incomplete requisition. From the requisition view, the **Move** button will allow you to move the item to a different requisition or back to your cart.



Hewlett-Packard Co

Product	Quantity	Price	Subtotal	
<input checked="" type="checkbox"/>  Travel Mouse (RH304AA) <small>Keywords: HP, Hewlett, Hewlett-Packard, Computer, Desktop, Laptop, Notebook, Wired, Mouse</small>	1	\$13.00 / Each	\$13.00	<a href="#">Details</a> <a href="#">Move</a>
			Supplier Total: \$13.00	<a href="#">Checkout</a>
			Cart Total: \$16.47	<a href="#">Checkout All</a>

## Creating a Shopping List of Frequently Ordered Products

If you have products that you regularly order, you can create a shopping list that can be reused every time you need to order those products. The products to be added to the shopping list need to be in the cart before proceeding. This is a great way to save time when you enter the product(s) manually on a frequent basis.

1. From the cart screen, click the **Add to Shopping List**.


[Add to Shopping List](#)

[Clear Shopping Cart](#)

2. The Create Shopping List screen will appear.

Add to Shopping List ×

Add to a new shopping list

Add selected items to existing shopping list

Favorites
▼

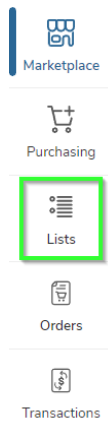
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Cancel

OK

3. The radio button for Create a new shopping list will be selected. Type a name for the shopping list in the field to the right.

4. If a shopping list has already been created and needs to be changed, select **Add selected items to existing Shopping List** and select the shopping list from the available options.
5. Click **OK**.
6. Once a shopping list has been created, it can be accessed by clicking on **Lists** in the menu bar of the Marketplace module.



7. The following options are available:
  - a. **Add selected to Cart** – select the products you want from the shopping list and click **Add selected to Cart** to add the products to your cart.

*NOTE: Doing so will replace anything that is currently in the cart.*
  - b. **More Actions** – for an entire cart include:
    - **Share Shopping List** allows the user to share the shopping list they created with other organization units.
    - **Rename Shopping List** allows the user to rename a shopping list.
    - **Delete Shopping List** allows the user to permanently delete a shopping list. A confirmation message will appear prior to deletion to confirm your selection.
  - c. **More Actions** – for a selected item include:
    - **Copy to List** allows the user to copy the item to another shopping list.
    - **Move to Top** allows the user to move the item higher on the shopping list.
    - **Remove selected t** allows the user to permanently delete the item from the shopping list.

*NOTE: When you use a Shopping List, the products will be added to any current products that you have in your shopping cart.*

# Incomplete Requisitions from Browsers

The users in your department that do not have GL Accounting authority will be able to shop and reassign their incomplete requisitions to you as the Buyer. As the Buyer, you will be alerted by email from [purchasing@siena.edu](mailto:purchasing@siena.edu) when an incomplete requisition has been assigned to you. See example email alert below.



## Requisition R00018 Assigned

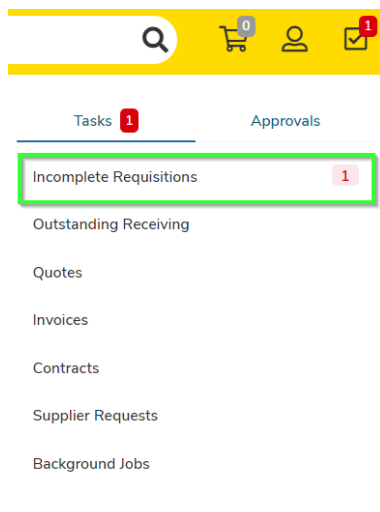
Buyer 1 has assigned a requisition to you for action. They included the note:

Please review this order and provide the correct accounting information for processing.

The requisition can be reviewed by clicking on Tasks -> [Incomplete Requisitions](#).



To find and process this incomplete requisition, go to the Tasks menu and Incomplete Requisitions.







In the Incomplete Requisitions page, you will see all of the requisitions that have been assigned to you for completion. Click the requisition number to open and review the details or click Checkout to begin the checkout process for completion of the requisition and routing for approval.

## Creating a Requisition

1. Any products appearing in the shopping cart with a check in front of the product will be forwarded on to the checkout screen. If you do not wish to order a product yet but don't want to delete it from the shopping cart, click the **checkbox** to remove the check.

<input type="checkbox"/>	PRODUCT	QUANTITY	PRICE	SUBTOTAL	
<input type="checkbox"/>	 SCOTT STANDARD ROLL 2PLY BATH TISSUE (13217) SCOTT STANDARD ROLL 2PLY BATH TISSUE 506SH, 80 rolls per case	1	\$33.30 / Case	\$33.30	<input type="checkbox"/> Remove <input type="checkbox"/> Details
<input checked="" type="checkbox"/>	 SCOTT JRT JR JUMBO ROLL TISSUE (7805) SCOTT JRT JR JUMBO ROLL TISSUE, 12 per case	1	\$28.00 / Case	\$28.00	<input type="checkbox"/> Remove <input type="checkbox"/> Details

Supplier Total: \$28.00

[Checkout](#)

2. Click Checkout to start the checkout and requisition process for the items being purchased for this supplier.

[Checkout](#)

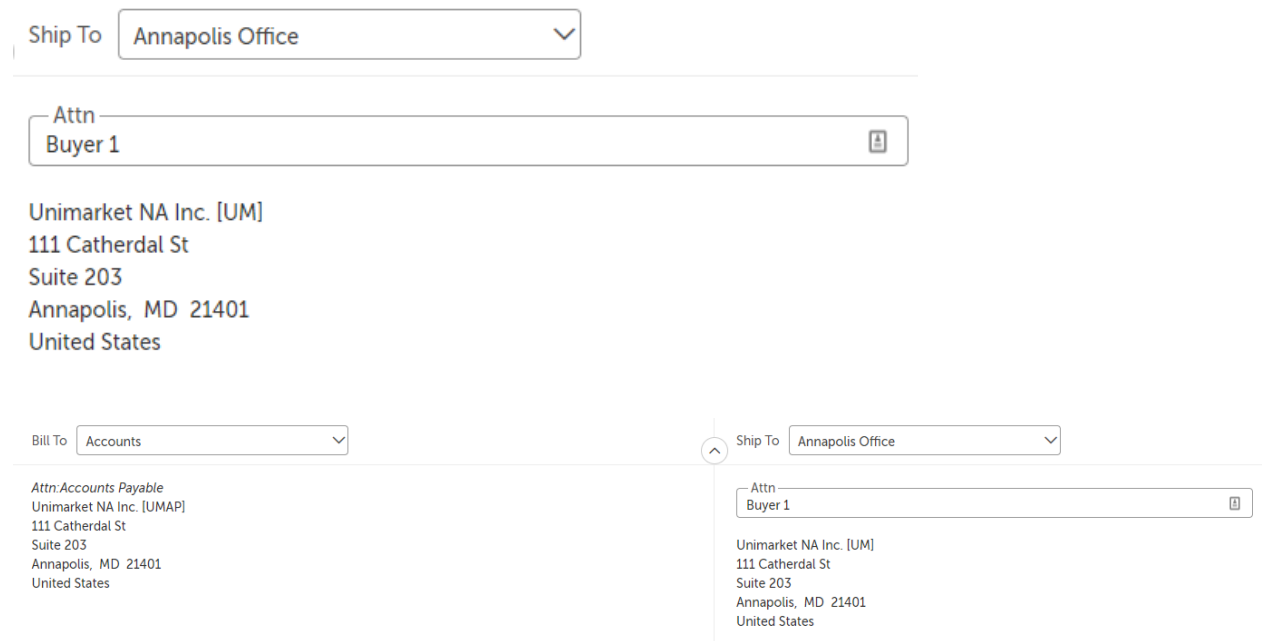
## Locations

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

### Attn Field

The Attention To field (Attn) is very important in your checkout process to ensure the accuracy of the delivery by the supplier. The most pertinent information for delivery should be first (left to right) in the "Attention To" field - i.e. lab or room # / Recipient last name / phone extension.

Example:



The screenshot displays two columns of address information. The left column is for the 'Bill To' section, and the right column is for the 'Ship To' section. Both sections have a dropdown menu at the top and an 'Attn' field below it. The 'Attn' field contains the text 'Buyer 1'. Below the 'Attn' field, the full address is displayed: 'Unimarket NA Inc. [UM]', '111 Cathedral St', 'Suite 203', 'Annapolis, MD 21401', and 'United States'.

Ship To Annapolis Office

Attn Buyer 1

Unimarket NA Inc. [UM]  
111 Cathedral St  
Suite 203  
Annapolis, MD 21401  
United States

Bill To Accounts

Ship To Annapolis Office

Attn Buyer 1

Unimarket NA Inc. [UM]  
111 Cathedral St  
Suite 203  
Annapolis, MD 21401  
United States

Attn:Accounts Payable  
Unimarket NA Inc. [UMAP]  
111 Cathedral St  
Suite 203  
Annapolis, MD 21401  
United States

## Organization Selection

Under the Bill To and Ship To section of the checkout screen will be an Organization section. This section is for visibility, receiving communication across your organization and spend analytics within Unimarket across for supervisors and other users.

Organization Accounting - 21000

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Organization Unit  
Accounting - 21000 

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


*Note: The above image is for example purposes and may not be specifically related to your organization*

Select the Organization that is appropriate for your purchase. Selecting the correct Organization unit will allow others in your organization to view. You may only have one selection available to you or you may have many depending on your organization's structure. This selection will also provide spend analytics on the Unimarket Procurement dashboard which is found under the Reports module. This selection does not have any impact to your ERP system or impact the GL Accounting information entered on your requisition.

## Checkout Items

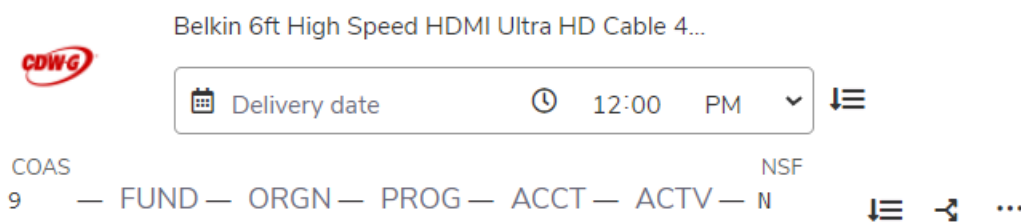
The products or services that you selected and sent to the shopping cart will be listed as separate lines in your checkout items. Each line item will show the product name, Unit Price/Unit of Measure, Quantity and Subtotal. You may remove the line items from the checkout screen using the buttons to the right of the products.

Use the Account fields to enter the value of the required accounting codes that will pay for the purchase.



- If you have set any segment of your organization's GL Accounting string in your "My Profile Settings" page, these fields will auto populate in every checkout instance. It is not recommended that you default the Account field as that should change for each type of purchase that you are processing.
- You can begin typing the number or description of the accounting element value and a dynamic list will appear. Select one of these options.
- Use the magnifying glass to open a search window if you have trouble finding the accounting element that you are trying to allocate for the line item.
- You can use the Copy Down button to repeat your selected accounts to each line below. 




### Delivery Date

- Delivery Date is an optional field on the line item that can be filled in as a suggested or preferred delivery date to the vendor. For critical deliveries, please follow up with the supplier directly to confirm the delivery date.



Belkin 6ft High Speed HDMI Ultra HD Cable 4...

 Delivery date 12:00 PM 

COAS 9 — FUND — ORGN — PROG — ACCT — ACTV — NSF N   

## Notes and Attachments

Enter any notes or attach any related documents to your order in the Justification or Notes and Attachments section of the checkout screen.

- a. The Delivery Notes and Order Attachments are for sending information to the supplier and will be sent to the supplier with the final PO.

*NOTE: If a different address is needed for delivery, alert the system administrators in Purchasing so they can add the new location to the pre populated list. Adding a different address in the delivery notes will not guarantee that the order is delivered to that address.*

- b. You can attach as many documents as needed with a single file size limit of 50 megabytes
- c. You can also attach a file in the Order Attachments and choose not to send it to the supplier.

- d. The Justification Notes and Attachment are for internal justification use and will not be sent to the supplier. Justification Notes will always be on the requisition and not carried over to the Purchase Order.

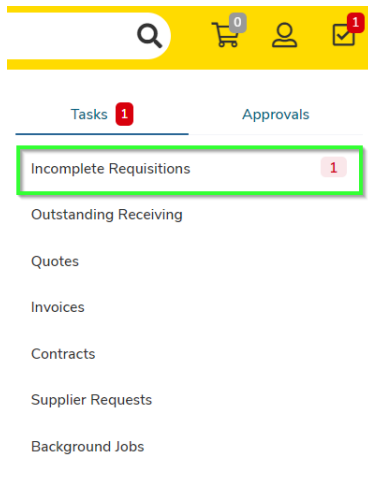
<input style="width: 95%;" type="text" value="Delivery notes"/>	<b>Order attachments</b> You can choose which order attachments will be sent to the supplier together with the order.
<input style="width: 95%;" type="text" value="Blanket order"/>	<div style="border: 1px dashed gray; padding: 5px;">  Drop files to attach, or <a href="#">browse</a>            Size limit 50MB.         </div>
<small>Optionally create a release order selecting a blanket order to draw down from.</small>	
<input style="width: 95%;" type="text" value="Financial year FY20"/>	
Justification Justification Type <span style="float: right;">^</span>	
<b>ⓘ The justification and attachments are for review by the approver. They will not be sent to the supplier.</b>	
<input style="width: 95%;" type="text" value="Justification"/>	<b>Justification Attachments</b>
<input style="width: 95%;" type="text" value="Justification Type Justification Type"/>	<div style="border: 1px dashed gray; padding: 5px;">  Drop files to attach, or <a href="#">browse</a>            Size limit 50MB.         </div>
<small>Please select the type of requisition that you are submitting.</small>	
<input style="width: 95%;" type="text" value="Requisition Type"/>	

## Saving a Checkout

2. If you need to enter more information and must come back to the checkout screen, you can Save your checkout progress.



This will create an Incomplete Requisition that can be seen in the Tasks Menu.



1. Once your checkout screen is complete with all the needed information, click Checkout.



## Reassigning your cart

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



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

Reassign ✕

\*Assign To ▼

\*Note ✎

A confirmation message will appear stating that the items have been forwarded to the designated individual. The Buyer will receive an email notification and the Incomplete Requisition will appear in the Tasks Menu for the Buyer to complete the requisition and route for approval. You can see the incomplete requisition status if you look at the View Requisitions page.

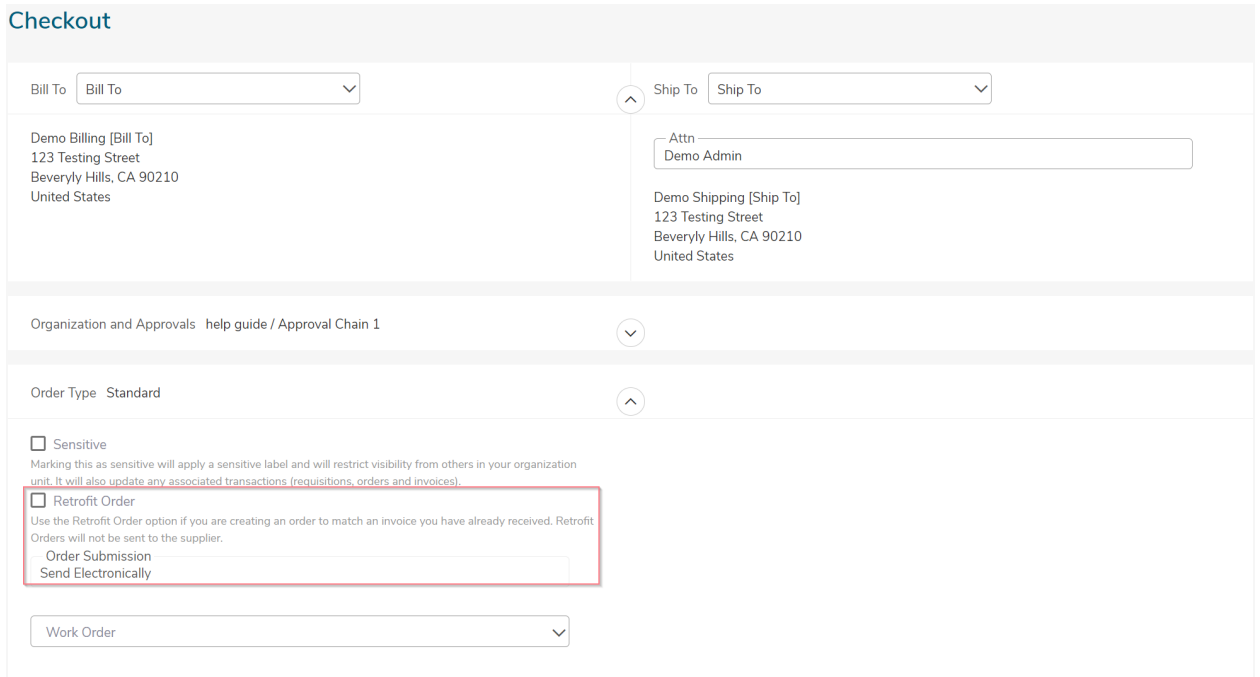
# Retrofit Orders

## Create a Retrofit Order

A retrofit order is used in cases where an order needs to be created in Unimarket after the fact. When checking out, check the box next to Retrofit Order under Order Type Standard. This is if you are creating an order to match an invoice you have already received. Retrofit Orders will not be sent to the supplier.

To create a Retrofit Order:

- On the checkout screen, click the section Order Type and select Retrofit Order.



The screenshot shows the checkout interface. At the top, there are dropdown menus for 'Bill To' and 'Ship To'. Below these are address fields for 'Demo Billing [Bill To]' and 'Demo Shipping [Ship To]'. A section for 'Organization and Approvals' is visible. The 'Order Type' section is expanded, showing 'Standard' as the selected option. Underneath, there are checkboxes for 'Sensitive' and 'Retrofit Order'. The 'Retrofit Order' checkbox is highlighted with a red box. Below it, there is a text input field for 'Order Submission' and a 'Send Electronically' checkbox. At the bottom of the section, there is a 'Work Order' dropdown menu.

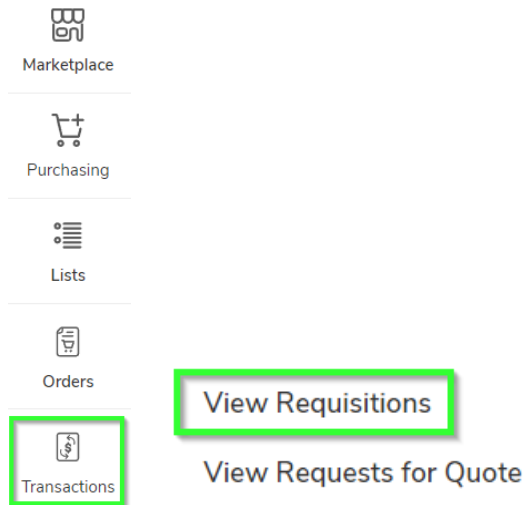
- Additional fields will appear including Related Invoice Number and Order Date (if enabled). Please note it will change the Order Submission field to Do not Send. For more information, check out the Unimarket HelpDesk page for [Creating a Retrofit Requisition](#).




# Tracking Requisitions

After successfully creating a requisition, you will be able to monitor the progress from your Dashboard on Unimarket or from the Requisitions page under the Orders menu.

1. Click the Transactions button from your left side menu and select “View Requisitions”.



2. Requisitions that have been submitted can be viewed on the Requisitions screen.
3. Click on the desired **Requisition** from the list.
4. You may also click  to view additional search filtering options.
  - a. The top portion of the screen will allow you to search for a requisition. Select from one or more of the following search options and then click the **Search button**.
    - i. **Requisition Number**
    - ii. **Period** (when it was created)
    - iii. **Supplier**
    - iv. **State**
    - v. **Buyer**
    - vi. **Organization Unit**
  - b. To select a requisition, click on the **Requisition number** from the list.
5. The approval status will be listed in the “State” column but to view more approval details of the requisition, click the desired requisition and then on the Approvals tab. You will see

the approvals that have happened, who the requisition is with now for approval, and the next approval steps needed before the order is created.

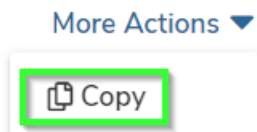
Items				
Approvals				
Comments (1)				
History				
Approval Process Instance: 2. Current				
Delegated Approval: US Operations (US Operations) <span style="float: right;">In Progress</span>				
Approver	Created Date	Completed Date	Level	Type
Approver 1	6/5/2020 4:38 PM		Clearing Authority (\$999,999.00)	In Progress

6. The various approval statuses include:
  - a. **Approved** – approved and advanced to the next organizational level
  - b. **Declined** – was not approved and sent back to the buyer
    - i. Declined requisitions can be copied and edited for resubmittal by the buyer who originally created the requisition
  - c. **Escalated** – skipped an individual and advanced to the next level
  - d. **In Progress** – current level of approval
7. Once a requisition has been completely approved, a purchase order will be generated and sent to the supplier. An email with the purchase order number and details of the purchase order will be sent to the buyer and the originator of the requisition confirming that the supplier was sent the order.

## Reprocessing a Declined Requisition

If your requisition is declined for any reason, you will receive an email notification with the requisition number and details along with any notes that the declining approver provided. Reprocessing a declined requisition is easy. Follow the below steps to copy and resubmit the requisition with changes.

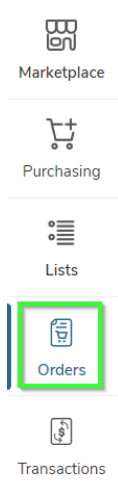
1. Click the link to view the declined requisition from declined email notification or go to View Requisitions and search by Declined in the State search filter.
2. At the top right of the requisition's view page under the Actions menu, you will see the option to Copy the requisition.



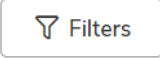
3. When you copy the requisition, all information including the notes and attachments will be copied into a new Incomplete Requisition for you to edit and resubmit.
4. When you click Copy, you will be taken directly to the Incomplete Requisition. Make any needed edits to the copied requisition and click Checkout to create the new requisition and route it for approval.
5. The new requisition will have a new number but will link and reference the old requisition for historical information.

# Viewing Orders

1. Orders that have been created can be viewed in the Orders area of the information section under the Dashboard or from the Order menu and View Orders page.



2. If the order is visible, click on the **order** from the list.

3. If the order is not visible, click  to see additional filtering options.
  - a. The top portion of the screen will allow you to search for an order. Select from one or more of the following search options and then click the **Search button**:
    - i. **Order Number**
    - ii. **Created Date**
    - iii. **Supplier**
    - iv. **Order Type**
    - v. **Buyer**
    - vi. **Organization Unit**
    - vii. **Order State**
    - viii. **Payment Method**
    - ix. **Views**
  - b. To select an order, click on the **Order number** from the list.

## Orders

Orders ▾

Q

Created Date  
 Last 90 Days ▾

Hide ▾
Export ▾

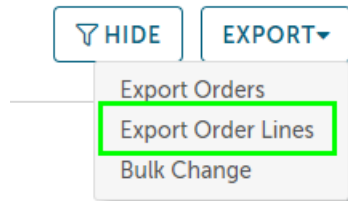
▾
  ▾
  ▾
  ▾

Apply Filter

▾
  ▾
  ▾

## Exporting Order Reports

- From the View Orders page, you can use the down arrow on the search button to Export the current search results into an excel spreadsheet with the header level report or an export of the line item detail.



OrderNumber	OrderType	PaymentMethod	PaymentStatus	RetrofitOrder	CreatedDate	OrderDate	OrderState	ReceivingState	HasAcceptedInvoice	RequisitionNumber	BlanketOrder	Organisation
XU000042	Standard	On Account		FALSE	4/2/2020 15:51	4/2/2020 15:51	Open	Open	FALSE	R0000046		Xavier University
XU000042	Standard	On Account		FALSE	4/2/2020 15:51	4/2/2020 15:51	Open	Open	FALSE	R0000046		Xavier University
XU000041	Standard	On Account		FALSE	4/2/2020 15:50	4/2/2020 15:50	Open	Open	FALSE	R0000045		Xavier University
XU000040	Standard	On Account		FALSE	4/2/2020 15:48	4/2/2020 15:48	Open	Open	FALSE	R0000027		Xavier University
XU000039	Standard	On Account		FALSE	4/2/2020 9:47	4/2/2020 9:47	Open	Open	FALSE	R0000044		Xavier University
XU000039	Standard	On Account		FALSE	4/2/2020 9:47	4/2/2020 9:47	Open	Open	FALSE	R0000044		Xavier University
XU000038	Standard	On Account		FALSE	4/2/2020 9:16	4/2/2020 9:16	Open	Open	FALSE	R0000043		Xavier University
XU000038	Standard	On Account		FALSE	4/2/2020 9:16	4/2/2020 9:16	Open	Open	FALSE	R0000043		Xavier University
XU000038	Standard	On Account		FALSE	4/2/2020 9:16	4/2/2020 9:16	Open	Open	FALSE	R0000043		Xavier University
XU000038	Standard	On Account		FALSE	4/2/2020 9:16	4/2/2020 9:16	Open	Open	FALSE	R0000043		Xavier University