Frequently Asked Questions

Q. **What is eProcurement?**

A. Electronic procurement, generally known as eProcurement, is the automation and management of the procure-to-pay process. It involves creating and approving purchase requisitions, issuing purchase orders, receiving goods and services, and processing invoices electronically.

Q: **What is Unimarket? What is *CTW OneSource*?**

A: Unimarket is the eProcurement company that CTW partnered with for our eProcurement solution. *CTW OneSource* is the internal marketplace name that CTW selected for this system.

Q. **Why are we implementing this new system?**

A. Transforming our procurement process to eProcurement is an important part of an overall strategy for reducing costs and leveraging efficiencies. Colleges and Universities like ours have found that implementing an eProcurement solution makes the purchase and payment processes faster, more efficient, provides better visibility and accountability and enables a higher level of compliance with policies and regulations. eProcurement is considered a best practice across higher education and supports CTW's objective of maximizing institutional efficiencies.

Q. **How will CTW OneSource help me do my job?**

A. *CTW OneSource* will help by making your product research, processing orders, tracking those orders and all associated actions such as receiving and payments easier, faster and more compliant. In particular, you'll be able to locate the best pricing with our preferred suppliers, find items on contracts, compare products across suppliers, and much more. *CTW OneSource* will allow you to create 'Shopping Lists' for items that you order regularly to facilitate your future purchasing process.

Q. **How will it work?**

A. With *CTW OneSource* you'll have an online procurement environment that provides an intuitive approach much like the online shopping cart experiences on so many websites.

Q. **How will I get training?**

A. There will be several options for training including instructor-led training sessions, along with training documentation, and on-line tutorials, which will be accessible via links in the ***CTW OneSource*** dashboard.

Q. **Will we still need to use Banner?**

A. Direct Pays and Budget Inquiries will continue to be processed in Banner. Historical data or historical entries will also remain in Banner. However, once a department transitions all purchase requisitions will be placed in ***CTW OneSource***.

Q. **How do I log into *CTW OneSource*?**

A. The link to ***CTW OneSource*** will be available on the CamelWeb page as soon as the College has fully transitioned. Single-Sign On access is available when logged in with your CTW username and password. Users will gain access to ***CTW OneSource*** after completing training

Q. **How does a user update their email address or phone number?**

A. Click on User icon (silhouette located at the top right of the site) and select My Account. Then click on Settings and the user can make changes to their contact information. The email address and phone number must be your CTW email and CTW 10-digit phone number.

Q. **What catalogs will be available in *CTW OneSource*?**

A. Many key suppliers have been identified for our marketplace. They include, but are not limited to: W.B Mason, Airgas, Dell, Connection, Grainger, B&H Photo Video, Amazon Business, Fisher Scientific and VWR. Catalogs will continue to be added as we identify suppliers that have valid contracts and can integrate with the system.

Q: **What is the difference between a Buyer and a Browser?**

A: The <u>Buyer</u> role in ***CTW OneSource*** is assigned to those users who have the authority to make purchases using College funds based on the Banner Finance Fund/Org Authority.
The <u>Browser</u> role is assigned to those users who have the need to create requisitions for goods and services but do not have the authority to make purchases using College funds based on the Banner Finance Fund/Org Authority.

Q. **What determines a Banner Finance user's Buyer/Browser role in *CTW OneSource*?**

A. Buyer and Browser roles will be assigned by department heads after training. If you need assistance you will need to contact purchasing@conncoll.edu for assistance or call Christopher Rust at x.5328.

Q. **What is the purchase requisition approval process?**

A. The ***CTW OneSource*** approval queue routings have been established that will expedite your purchasing experience. Click on *'How do approvals work?'* for more detail.

Q. **What do I do if my Approver is out of the office and not available to approve my requisition?**

A. Approvers have the ability to designate a Proxy when out of the office. This Proxy will have the ability to approve requisitions in their absence. In addition, approvals will automatically be escalated within a pre-set period of time.   You may also set your "out of office" in the profile setting by clicking on your silhouette, then click on "out of office", check the box that shows that you are unavailable and set your date and time.

Q. **What is the proxy time frame? Can it be indefinite?**

A. This is a temporary period (such as a vacation or FMLA) not meant to be ongoing. The user should be added to queues if ongoing.

Q. **How does approval escalation work?**

A. If no action is taken within 24 hours of the approval task, the approval will be escalated to the next approver with authority to take the approval action. If the approver is the last in the approval chain and the 24 hours have passed, the requisition will wait for the approver to take action. This is an automated process within the system. If something is urgent then you should contact the approvers directly.

Q. **Approvers are able to edit which fields?**

A. Depending on your fund/org access, approvers will have the ability to edit the Justification notes and Justification Attachments, Delivery Notes and Order Attachments, Index/ FOAP elements (system checks fund/org security of the Buyer) as well as the Ship To and Bill To fields dependent on the Chart of Accounts the approver has access to.

Q. **If FOAP elements are edited by an approver, does the purchase requisition route back to the Buyer?**

A. The purchase requisition will not route back to the Buyer, but it may follow a different approval path, if the FOAP requires it. A comment on the requisition can be posted by the approver which will alert the buyer of the change.

Q. **What happens to a disapproved/declined requisition?**

A. Declined requisitions can be found in the View Requisitions page, copied and edited for resubmittal by the Buyer who originally created the requisition. Requisitions remain in the system and can be viewed using filters such as "state" (declined, abandoned, canceled, incomplete…). The requisitions remain in the system perpetually.

Q. **Can I resubmit a declined requisition?**

A. Yes, if a requisition is declined, you can search for that requisition and while viewing you can Copy the declined requisition to be edited and resubmitted for approval.

Q. **Can I charge a single item to 2 FOAP's?**

A. Yes, use the 'Split' button next to the individual line items. You must have purchasing authority for the additional indexes or reassign the requisition to someone who does to make the split.

Q. **What if I receive a damaged/broken item?**

A. If Items received are damaged or broken, this should be communicated through your 'Receiving' report. Here is where you will select the 'Return' option that will notify the supplier that there is an issue with your order. Accounts Payable will not process any invoice until all items with the order are marked as "Received". Once the supplier has either credited back the damaged good or reshipped a replacement, you then will proceed to mark the item as received where Accounts payable will then process the invoice.

Q. **Can I use *CTW OneSource* for purchasing a service?**

A. Yes, you would use the Non-Catalog Item option to enter in the full description of the services to be provided.

Q. **Will *CTW OneSource* check my budget as part of the purchasing process?**

A. Yes, when a buyer clicks the checkout button or an approver tries to approve a requisition the system will:

    a.   Check that the FOAP is valid and active

    b.   Check that you have purchasing authority for the selected index

    c.   Check the budget for the FOAP

Q. **What should I do if I receive a message indicating that there is insufficient funding?**

A. You will need to contact the appropriate College Business Office or the Budget Office to request a budget transfer. The Office of Sponsored Research Administration should be contacted for all grant budget inquiries.

Q. **Can I process orders that exceed my budget allocations?**

A. No. ***CTW OneSource*** will perform budget checks by comparing the total purchase amount against the available funding in Banner for the FOAP being used for the specific purchase. If the budget check fails, there will be a message indicating the budget is not sufficient and will stop the requisition until a budget transfer is completed.

Q. **What is the maximum dollar amount we can order when purchasing from a catalog?**

A. There is no dollar limit to what can be ordered. Catalogs have been established based on existing contracts and therefore, user departments can order any items included in the contract and made available in ***CTW OneSource***. However, ***CTW OneSource*** performs multiple budget checks during the requisition creation and approval routing process before a purchase order is created. If budget is not available, ***CTW OneSource*** will stop the requisition until sufficient funding is available in the appropriate organizations, index and account codes.

Q. **Can I start creating an order by placing products in my cart and not finalize it until later?**

A. Yes, you can initiate a requisition at any time. If you are not ready to check out yet, simply hit the save button. Once you are ready to make additional changes or finalize your order, you can access the Incomplete Requisition and complete the check-out process. You can open, edit and save a requisition as many times as you need up until the point when the check-out process is completed.

Q. **If I order the same items each time, is there a way to duplicate my order to reuse again?**

A. Yes, you can create Shopping Lists for orders that you process regularly. This will expedite your purchasing process. You can set up as many Shopping Lists as you need. In addition, you can find previous orders and copy them, edit as needed to meet your current needs and submit as a new requisition for approval.

Q. **Are justification notes to be completed?**

A. Yes, Justifications notes are always required. These notes are only visible internally to CTW users and approvers. Purchase justifications are necessary to define the specific reasons for the purchase needs, which should align with the University's budget process.

Q. **Will Receiving be required in *CTW OneSource*?**

A. Yes. Receiving replaces the invoice approval currently used in Banner. You should only "receive" your items once you have inspected the shipment.

Q. **Who is able to perform the Receiving function?**

A. The Buyer of the order and/or another Buyers/Browsers in that Org Sharing Unit can receive the item. Buyers and Browser's both have the ability to complete receiving reports.

Q. **When would a Buyer assign a purchase requisition to another Buyer?**

A. The Buyer may not have access to the fund/org to be charged, or may be waiting for more information and is scheduled to be out of the office. The requester's name remains in the Ship To field on the PO (or can be changed) and appears in the Originator field on the *CTW OneSource* order screen.

Q. **What is an Organization Unit in *CTW OneSource*?**

A. The Organization Unit (Org Unit) in *CTW OneSource* allows for the visibility and permission sharing of requisitions, orders and invoices based on the hierarchy of the campus divisions and departments. Always select the lowest level Org (displaying 6-digit).

Q. **Who can edit an Org Unit?**

A. The Buyer or the System Administrator can select a different Org Unit but should be related to the Org associated with the index on the requisition.

Q. **Should department supervisors, who do not have Banner Finance access, be set up as Browsers?**

A. Browsers can shop and reassign their cart to a Buyer, and perform the receiving function for orders in their Org Sharing Units. This would replace the current paper process of department supervisors searching online for items and then writing a paper request for the Requisitioner to enter into Banner. Browser cannot be in the Approval Queue of a requisition.

Q. **Why are the *CTW OneSource* purchase order numbers sequenced differently than purchase orders issued from Banner?**

A. Purchase orders in *CTW OneSource* begin with UP, whereas purchase orders in Banner begin with a "P". This allows users to differentiate between purchase orders issued in *CTW OneSource* and Banner. Invoice numbers are also sequenced differently. Invoices from *CTW OneSource* in Banner will begin with an UI, whereas invoices begin in Banner with an "I".

Q. How do I purchase from a new Vendor?

A. If you cannot find your supplier in *CTW OneSource* you can request a supplier by going sending an email to purchasing@conncoll.edu

You will not be able to initiate your requisition until the supplier is established in *CTW OneSource*