SALT LAKE COMMUNITY COLLEGE

SLCCBuy MANUAL

Version 1 – Sept. 2023

Contents

Section 1: Getting Started

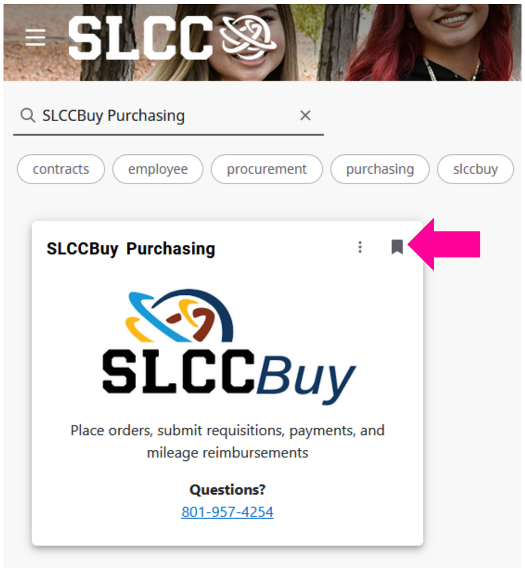
Introduction

SLCCBuy is the College's electronic Procure-2-Pay system. SLCCBuy is used to place orders with contracted vendors and to submit requisitions (non-catalog items), payment requests, and mileage reimbursements. SLCCBuy is not used for travel (see the Chrome River Manual). SLCCBuy is used to request procurement and non-procurement contracts and is the repository for contracts.

SLCCBuy provides a fully electronic solution for purchasing and payment services. It has a built-in electronic workflow for order and document review and approval. SLCCBuy has a marketplace of vendors who are on contract and from whom products can be purchased directly. These catalogs, or punch-outs, allow users to shop on a vendor's website and checkout in SLCCBuy.

Logging in

To log into SLCCBuy, navigate to Experience (MySLCC) and click the link located on the SLCCBuy Purchasing card. If you don't see the card, you can search for it by scrolling to the bottom of the page and clicking the "Discover More" button OR clicking the menu button and selecting Discover. On the search screen type "SLCCBuy" in the search box. If you would like to add the card to your home page, click the flag in the upper-right corner of the card.



You can also locate a link to SLCCBuy on the Purchasing Systems & Resources page of the Purchasing and Accounts Payable website.

SLCCBuy uses Single Sign On (SSO); if prompted, you will use your SLCC credentials to login.

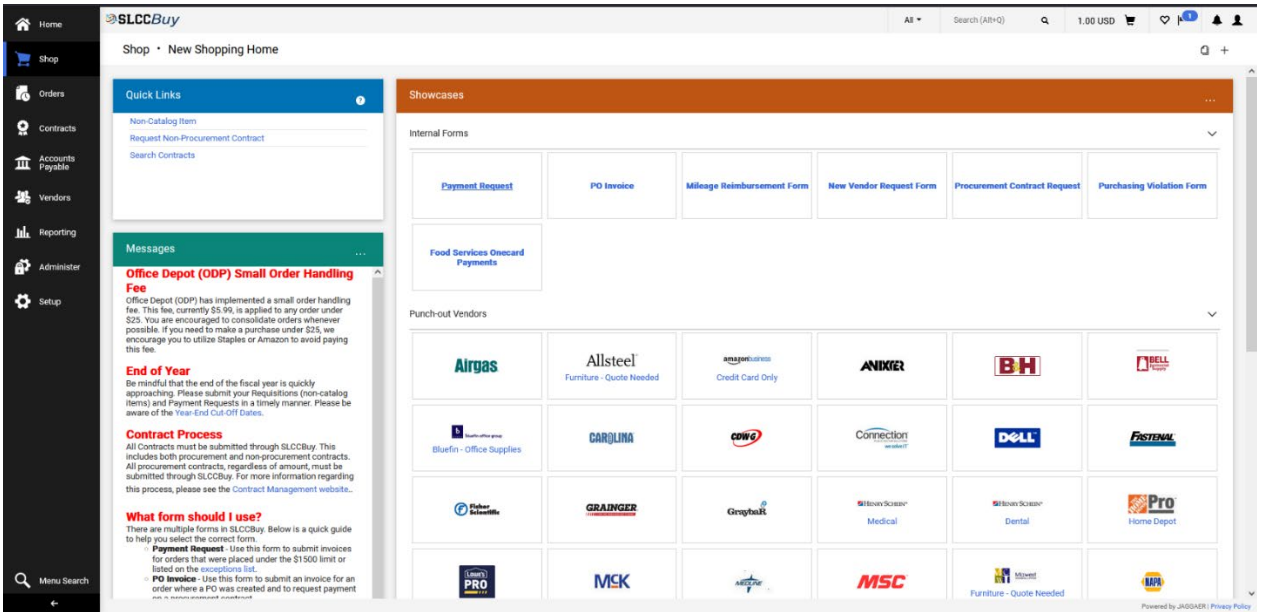
Creating a Bookmark Link

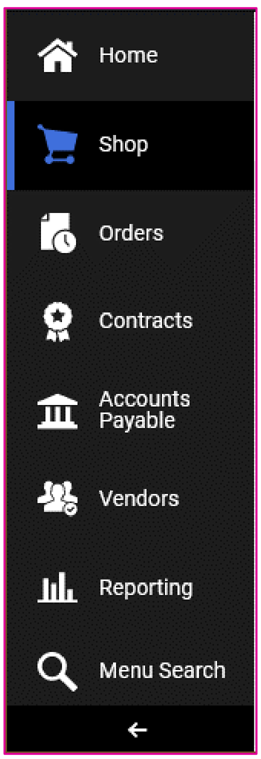
SLCCBuy uses single sign on (SSO). Therefore, you cannot simply create a bookmark link by clicking the star icon in your browser when on the SLCCBuy page. You will need to manually create the bookmark. The steps may differ depending on your browser.

1. Navigate to the Purchasing and Accounts Payable website and click on the Purchasing Systems & Resources link.
2. Right-click on the SLCCBuy logo and select Bookmark Link.
    a. If the Bookmark Link option is not available, choose Copy Link.
        i. In your browser, navigate to your Bookmark Manager
        ii. Select the option to add a link.
        iii. Enter a name for the bookmark.
        iv. Paste the URL in the appropriate field.
        v. Save.

Basic SLCCBuy Navigation

The default homepage for all users is the **Shopping Dashboard**.





Global Menu

On the left you will see the **global menu**. This houses the different modules SLCCBuy has. Depending on your assigned roles, you may see different icons. Standard icons include:

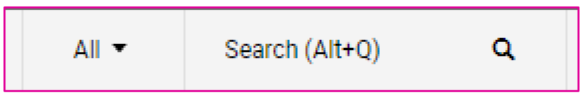
1. **Home** – Returns you to the home page.
2. **Shop** – Allows you to manage your shopping carts and create orders.
3. **Orders** – Allows you to search and view your requisitions, purchase orders, and invoices.
4. **Contracts** – Allows you to search contracts you have access to and request new non-procurement contracts to be created.
5. **Accounts Payable** – Allows you to view invoices.
6. **Vendors** – Allows you to search for vendors
7. **Reporting –** Allows you to generate reports, if enabled.
8. **Menu Search** – Allows you to search for a menu item, not a document.
9. The arrow at the bottom will switch between showing icons with names and icons only.

Action Bar

Across the top of the page, is the **action bar**. This gives you quick access to various functions and will always be at the top.

Search Bar

The **search bar** allows you to quickly search for documents using a document number or name. For the best results use the drop down to select which type of document you are looking for.

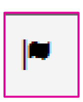


Shopping Cart

The **shopping cart** will give you a quick total of your current transaction. You can save shopping carts for later use. See the **Cart Management** section for more information and best practices.

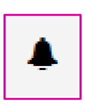
Action Items

Action items are flagged and will give you quick access to items you need to approve or take other action on. If you have action items, a small bubble will display with the number of outstanding action items over the flag.



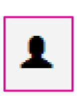
Notifications

The **notifications** bell will give you important status updates. If you have unread notifications, a small bubble with the number of unread notifications will be displayed over the bell.



Profile

Your **profile** gives you access to various quick settings and recently completed documents.



SLCCBuy Cart Submission Access

All employees have access to SLCCBuy. When an employee logs into SLCCBuy for the first time, the system will automatically create a user profile. Note that even though all employees have access to SLCCBuy, not all employees have access to submit carts. In order to submit carts, a user must have Banner Finance access. If a user submits a cart and does not have Banner Finance Access or does not have access to the Index used, the cart will be returned.

Not all employees are eligible to have Banner Finance access. This access is reserved for BCMs, Administrative Assistants, Secretaries, and other similar positions with the responsibility to monitor or manage a budget. Access is managed by the Controller's Office.

Users that do not have Banner Finance Access will need to assign carts to an individual in their department to submit carts on their behalf. See **Default Cart Assignees** for more information.

To request Banner Finance access, complete the Banner Access Form on the Helpdesk website. The form is routed to IT and the Controller's Office for processing.

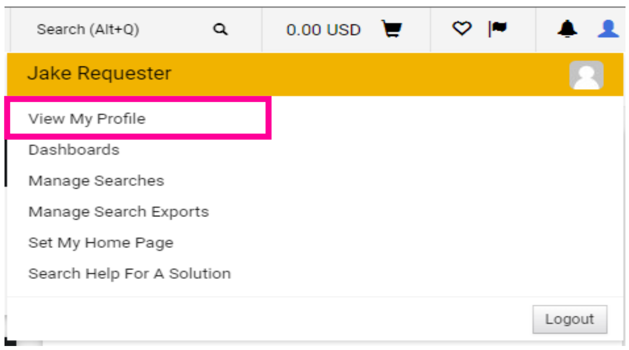
Note that all users can submit the following **without** having Banner Finance access:

1) All P-Card holders can submit p-card orders utilizing those punch-out catalogs that accept p-cards, e.g., Amazon and Staples.
2) All users can submit **PO Invoice** and **New Vendor Request** forms.
3) All users can submit non-procurement contracts.

SLCCBuy User Profile and Default Settings

New users will need to complete their profile before they can submit carts. To access your SLCCBuy user profile, click the **profile icon** in the upper right of the screen.

After clicking on the profile icon, you will see the option to "**View My Profile.**" Select this option to set your profile's default options.

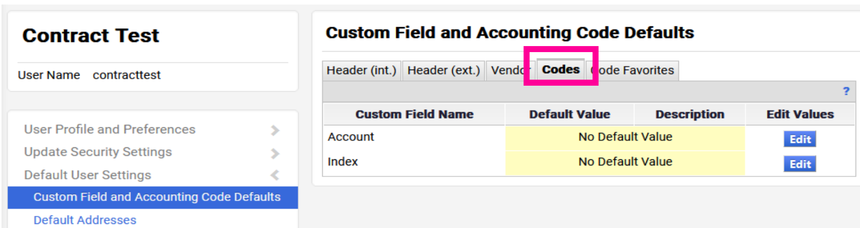


Default and Favorite Accounting Codes

Users are not required to set default or favorite accounting codes. However, it is strongly encouraged.

Select "**Custom Field and Accounting Code Defaults**" from the **Default User Settings** sub-menu on the profile page.

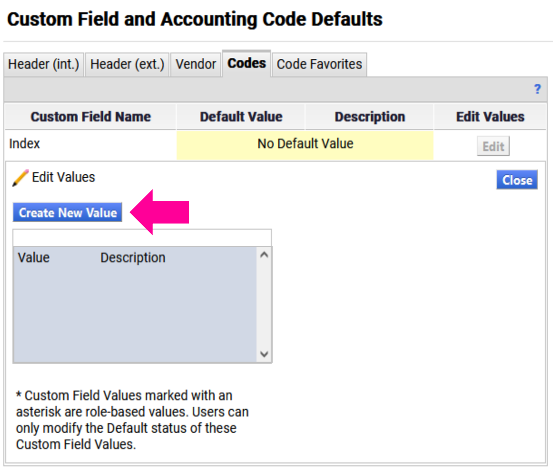
Select the "**Codes**" tab.



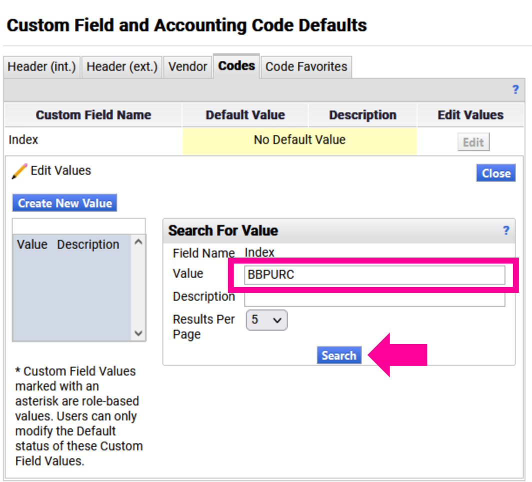
Here you can select specific Indexes to add to a favorite list and even select a default Index.

To add/edit an Index to your list, click the **"Edit"** button.

Select "**Create New Value**." *This does NOT create a new Index – but will allow you to search indexes to add to your favorites list.*

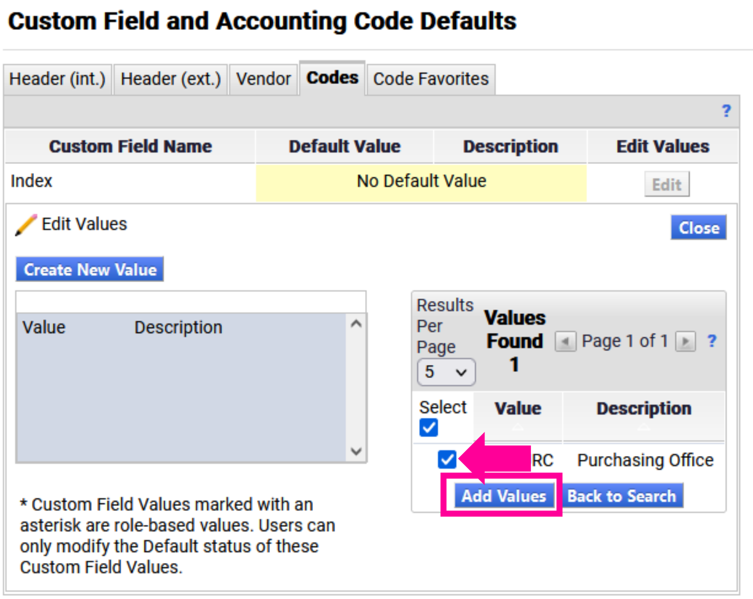


Search for your Index by typing your index in the "**Value**" field and selecting **Search**.

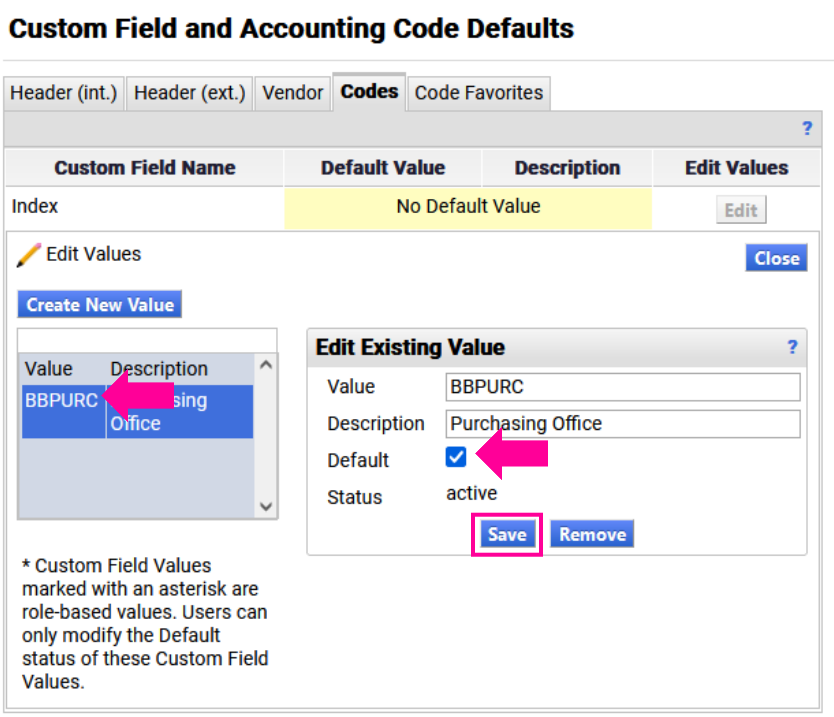


Once you find your index, mark the **checkbox** and select "**Add Values**."

You can repeat these steps to add additional indexes.



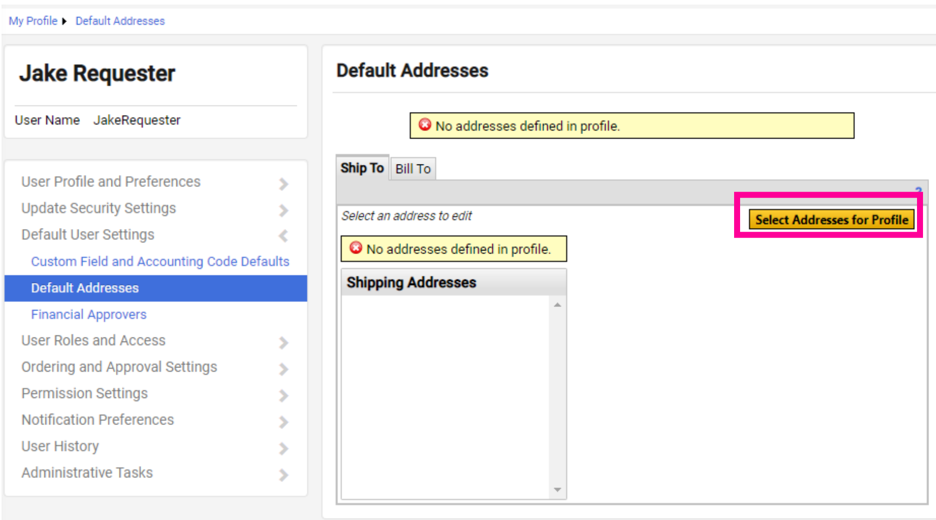
If you only use a single index and do not use a p-card to place orders, you can set a default Index. First click on the Index from the list. Check the "**Default**" box and click "**Save**." Note that a default Index will automatically be added to **ALL** requisitions, including those for which a p-card will be used, so we recommend only setting a default index if you do not use a p-card to place orders and only use a single index.



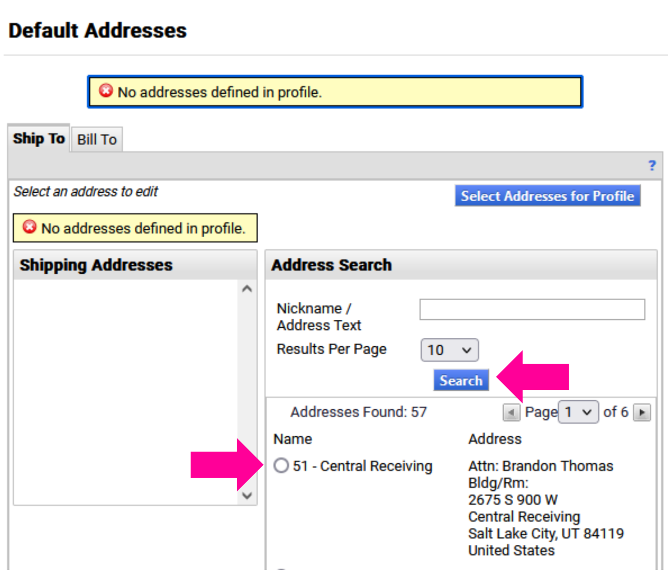
Default Addresses

First-time users will need to set their default addresses before they can submit carts. To set your default addresses, navigate to your profile and select "**Default Addresses**" under the **Default User Settings** menu. All orders should be shipped to Central Receiving. Therefore, your default Ship To address should be "**51 – Central Receiving**". You should not use any other address unless directed to do so by Purchasing and Accounts Payable.

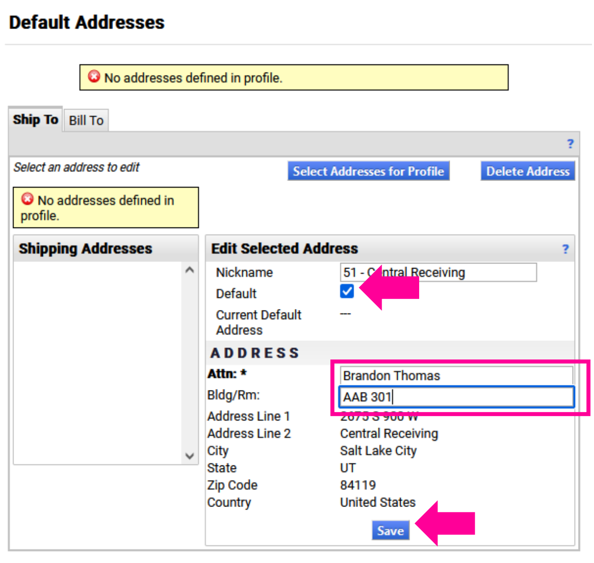
If no address is listed, or if a different address is listed, you can add the default address by clicking "**Select Addresses for Profile**".



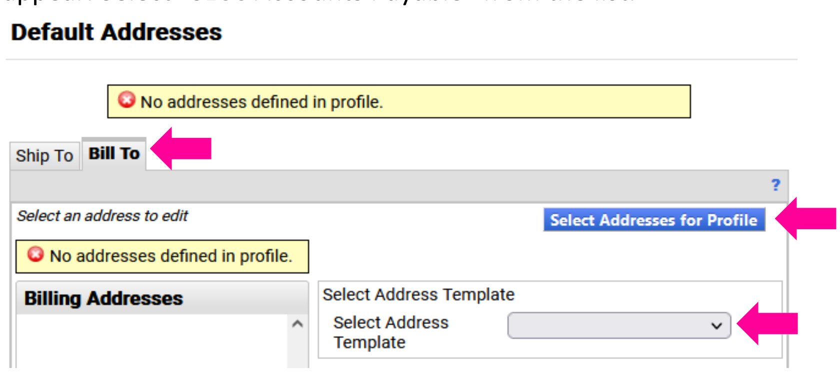
To list all addresses, click the "**Search**" button. Select "51 – Central Receiving".



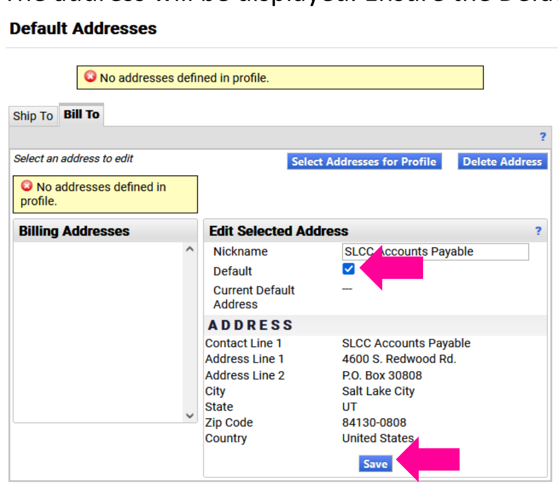
Make sure that the **Default** box is checked. Your name should auto-populate in the **Attn** field. Enter your Building and Room number in the **Bldg/Rm** field. Then click the **Save** button.



To set your default Bill To address, select the Bill To tab. Then select the Addresses for Profile. A dropdown menu will appear. Select "SLCC Accounts Payable" from the list.



The address will be displayed. Ensure the Default box is checked and click the Save button.

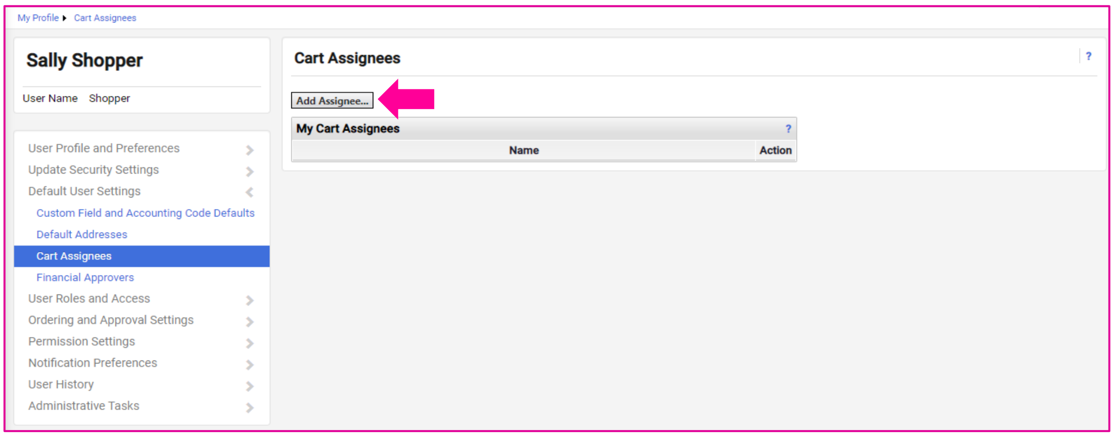


Default Cart Assignees

A carts assignee is an individual who has Banner Finance Access and will submit carts on your behalf. This is typically your department administrative assistant or secretary. BCMs should **NOT** be set as an assignee. An assignee is **NOT** an approver. It is highly recommended for any user who does not have Banner Finance access to set a default cart assignee.

Shoppers can designate favorite or default (preferred) cart assignees by selecting **Default User Settings > Cart Assignees**.

Select **Add Assignee…** and search/select from the list.



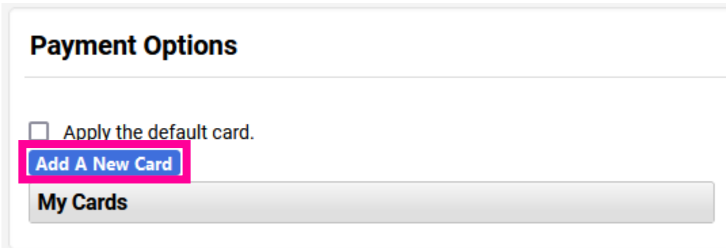
To set an individual as your default assignee, select **Set as Preferred**.

If an individual cannot be found in search, e-mail the SLCCBuy Administrator and they will add them for you.

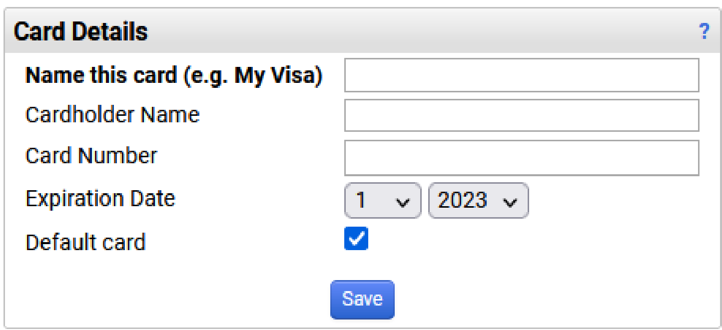
Enter P-card Information

To add your p-card to SLCCBuy, navigate to the Default User Settings > Payment Options in your profile.

Click the Add a New Card button.

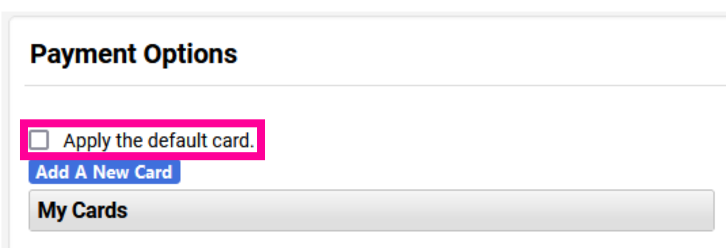


Enter your p-card information and click Save.



When your p-card expiration date is updated or your card is replaced, you will need to come back here and update the information.

If you will only be placing orders with your p-card, check the "Apply the default card" box. This will add your p-card to **ALL** orders.

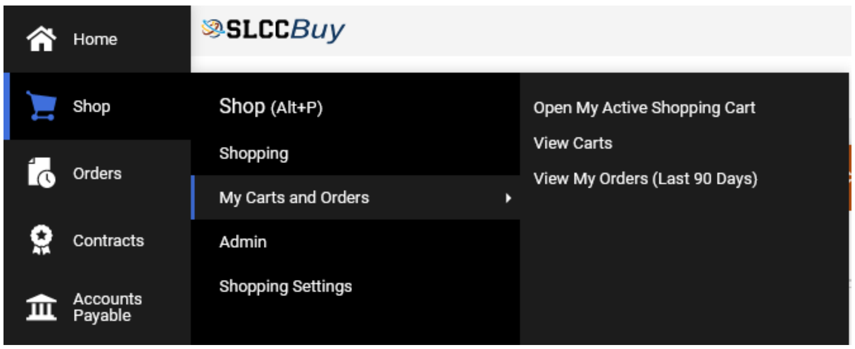


Managing Carts

Typically, a user will have only one cart at a time. However, users can have multiple draft carts at the same time. They can also have multiple assigned carts.

To view a list of your draft and assigned carts, select **Shop > My Carts and Orders > …**

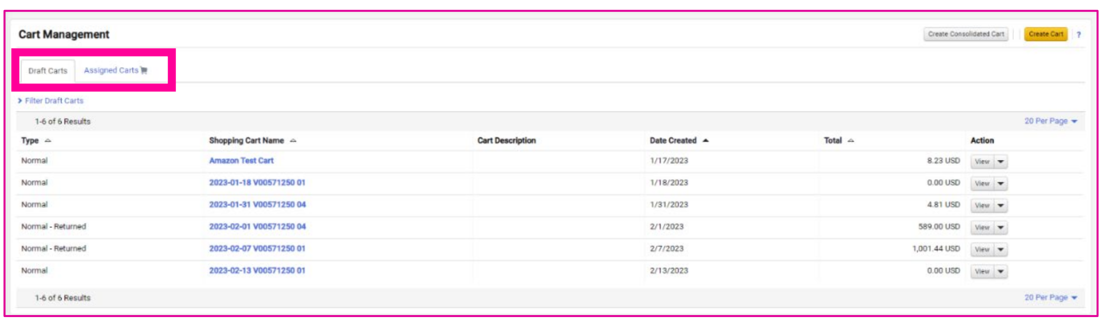
- **Open My Active Shopping Cart** – will show your currently active cart.
- **View Carts** – will display both *unsubmitted/returned carts* and *assigned carts.*
- **View My Orders** – will display carts you have submitted in the last 90 days.



View Carts

Select **Shop > My Carts and Orders > View Carts**.

Users can have more than one draft cart at a time. On this page you can see both your draft carts, including returned carts, and carts you have created that are assigned to others for submission. You can switch between the different types by clicking the associated tab.



To select a specific cart, click the **View** button. This will make the cart your current active cart.

To delete a cart, select the down arrow next to **View** and select **Delete**. Note when a cart is deleted, it is completely removed from the system.

If you have created a cart, but are not ready to submit it, you can create a new cart by clicking the **Create Cart** button in the top right. This will allow you to submit other carts until you are ready to submit the first cart. To return to your previous cart, navigate back to this page and select the cart by clicking the **View** button.

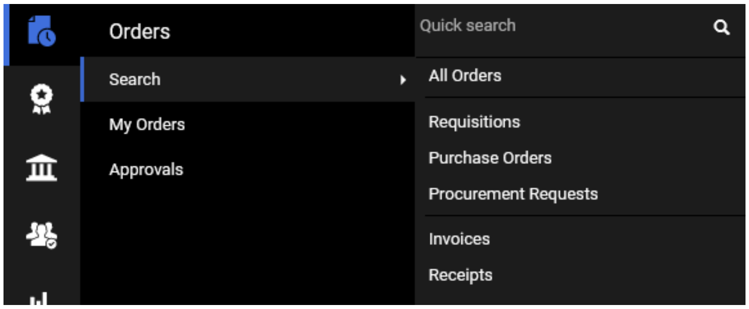
Documents Search

Users have access to view all documents under their department. Access is based on the department listed in Active Directory, which can be viewed in Outlook. An individual can also see any document they submitted or approved, regardless of the department listed on the document.

Some individuals need access to documents for multiple departments. This can be setup by the SLCCBuy Administrator. To request this access, send an email to the SLCCBuy Administrator.

General Document Search

To search for documents (requisitions, POs, Procurement Requests, Invoices, and Receipts), click **Orders > Search**. This search will show all documents you have access to.



Requisitions = Requests. Approvals occur during the requisition stage.

Purchase Orders = After being approved, requisitions are turned into purchasing orders (POs). POs that start with a “P” are regular PO orders and create an encumbrance in Banner. POs that start with a “Q” are p-card orders. POs that have only numbers are created from Payment Requests, Mileage Reimbursements, and Purchasing Violations.

Procurement Requests = These are forms that are not submitted as carts. This includes the PO Invoice and New Vendor Request forms.

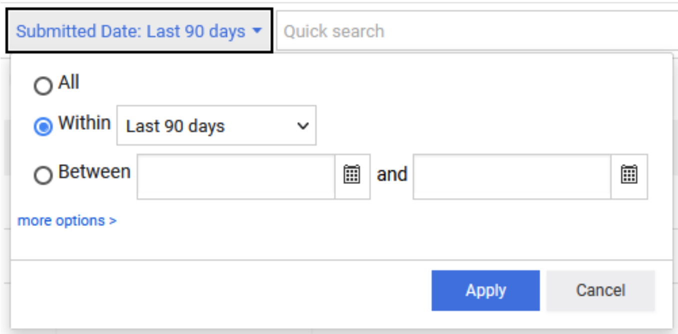
Invoices = POs that are all numbers auto generate an invoice that is sent to Accounts Payable (A/P) for review and approval. Invoices for POs that start with a “P” are either submitted by vendors electronically directly into the system or are manually entered by the A/P team.

Receipts = Receiving. Most items on POs that start with a “P” must be received before an invoice can pay. This includes POs for both goods and services. These documents are typically entered by Central Receiving. Some are entered by Purchasing & Accounts Payable. Departments can also enter receiving when appropriate. See **Entering Receiving**.

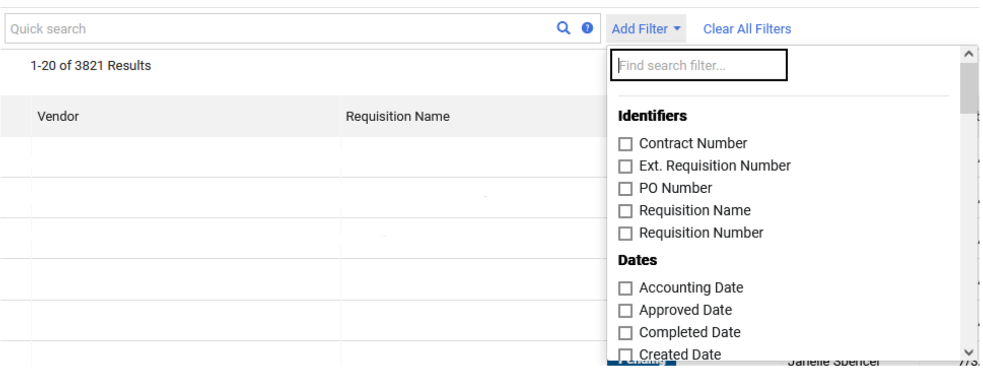
All Orders = This will show all requisitions, POs, and Invoices. It is recommended to use the search for the specific document you are looking for rather than All Orders as the results and filters are more robust.

To see only documents you have submitted, go to My Orders.

By default, the system will only display the last 90 days of documents. To change the time frame, click the Submitted Date field and enter the desired time frame.

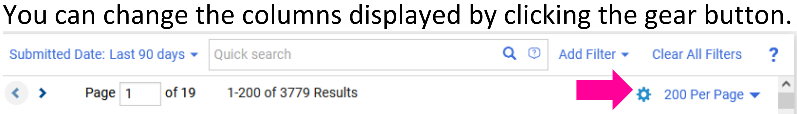


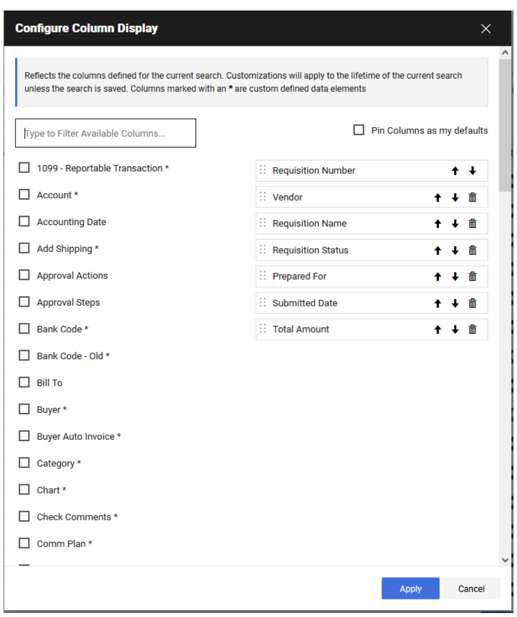
You can also enter keywords in the search field and/or utilize filters. You can use the Quick Filters on the left or add your own filters.



You can see basic information including the status of each document in the results.

You can change the columns displayed by clicking the gear button.



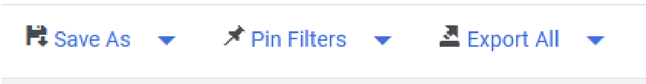


Check the box for the column you would like to add.

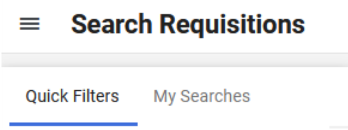
The columns that will be displayed are listed on the right. You can move them around to change the order.

To permenantly add the columns selected, click the **Pin Columns as my defaults** box.

You can save this search, pin the filters, or export the results to Excel by clicking the associated buttons at the top of the search page. If you pin your filters, the system will remember all of your filters and apply them everytime you load the search screen.



To view a previously saved search, click the My Searches in the Left Panel.

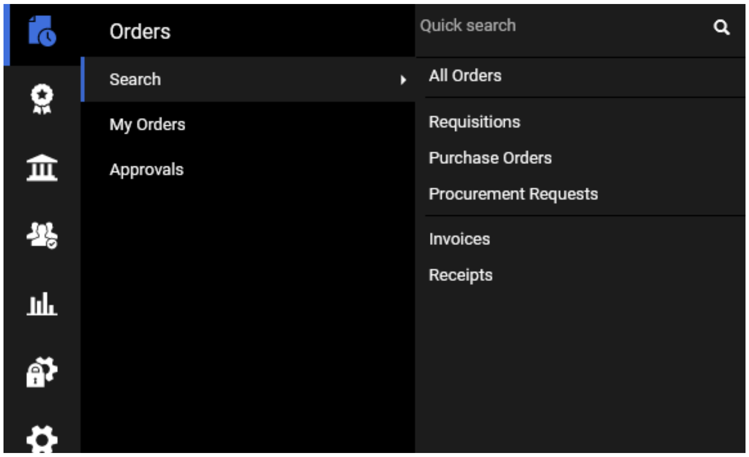


Example Search - Open Purchase Order Search

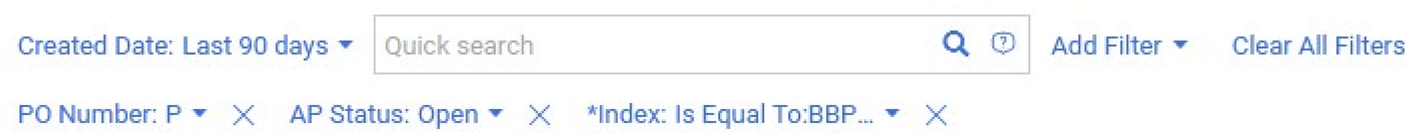
This is an example of a report you can create using purchase order search. It is recommended that you create and save this search.

To view a list of Open Purchase Orders in SLCCBuy, do the following:

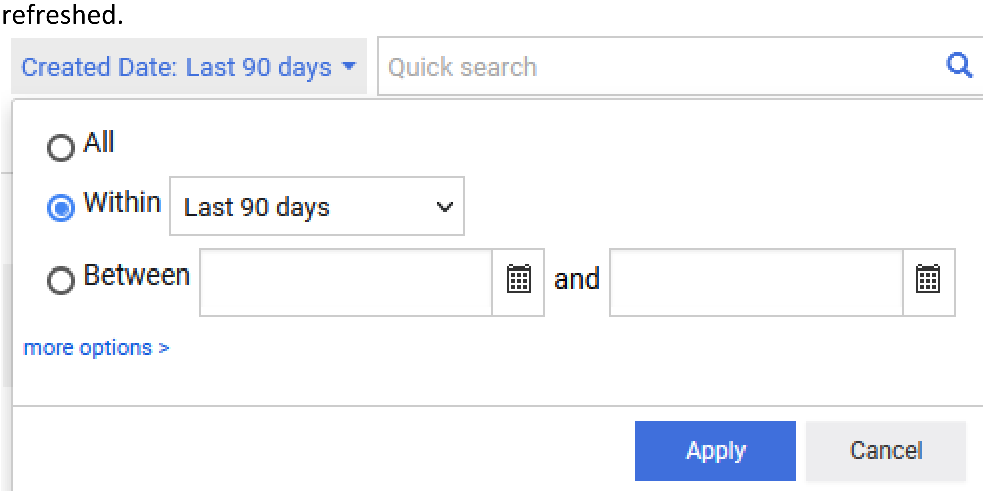
1. Click on the document icon on the left side of the window.
2. Hover over Search and select Purchase Orders.



3. Click on Add Filter and select PO Number.
4. Enter “P” in the box (no quotes) and click Apply. The displayed list will update to show only POs that start with a P.
5. Click on Add Filter and select AP Status.
6. Click Open and then Apply. The displayed list will update to show only POs that are currently open.
7. If you would like to filter the list to specific Indexes, click on Add Filter and select Index. Enter the indexes separated by commas and click Apply. The list will be refreshed.



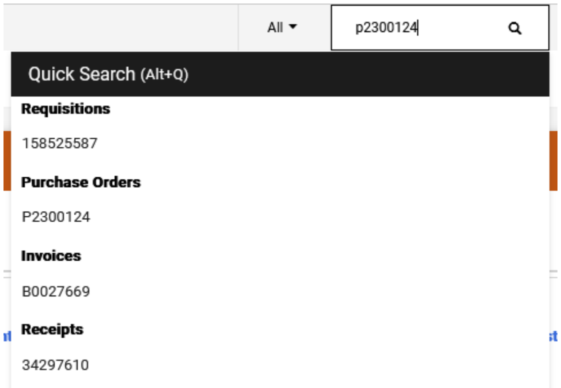
8. Note that by default the system displays POs created within the last 90 days. To change the time frame, click on Created Date next to the Quick Search box. Select the appropriate time frame and click Apply. The list will be refreshed.



9. To view details for a specific Purchase Order, click on the associated PO Number.

Direct access

You can access a document directly by typing the number into the Quick Search box at the top of the window and hitting Enter. All documents related to the document number will be displayed. Click on the document number to see details.



Viewing Invoices paid against POs

To view all invoices that have been paid against a Purchase Order, you must first access the PO either through search or direct access. On the Purchase Order screen, click the Invoice tab. All of the invoices that have been paid against this PO will be listed. You can scroll down to review each line item on the PO and the Open amount and Invoiced amount. This is great for Standing PO's.