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Overview of Shop OnLion

Shop OnLion in SIMBA replaces eBuy. All University employees will have access to use Shop OnLion and will be able to submit shopping carts.

Shop OnLion Terminology

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Catalogs</td>
<td>Also known as “punchouts”, catalogs are located on external suppliers’ websites and accessed through a link named Lion Marketplace.</td>
</tr>
<tr>
<td>Contracts</td>
<td>Pre-loaded contracted items available to the shopper in Shop OnLion.</td>
</tr>
<tr>
<td>Free Text</td>
<td>Used when items are not available from catalogs or contracts; entered from a supplier quote.</td>
</tr>
<tr>
<td>Shopping Cart</td>
<td>Utilized by shoppers to purchase goods and/or services instead of a requisition tool.</td>
</tr>
<tr>
<td>Goods Confirmation</td>
<td>Processed by Shoppers, Goods Recipient on the Purchase Order, and Procurement Substitutes. Acknowledges the physical receipt of materials or services from suppliers.</td>
</tr>
<tr>
<td>Goods Receipt</td>
<td>Processed by Central Receiving. Acknowledges the physical receipt of materials or services from suppliers.</td>
</tr>
<tr>
<td>Workflow</td>
<td>Process by which documents route for approvals within Shop OnLion.</td>
</tr>
</tbody>
</table>

Shoppers will have access to punch-out catalogs through the Lion Marketplace. SIMBA introduces enhanced functionality to expedite ordering by shopping Contracts that have been pre-negotiated by Purchasing. Free Text shopping carts can be submitted for materials or services that are not available in a Lion Marketplace catalog or Contract. Procurement documents are routed and approved in Shop OnLion.

Shop OnLion Roles

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shopper</td>
<td>Responsible for creating a shopping cart to purchase goods and/or services from a particular supplier. In some instances, Shoppers also inspect and receive procured items into Shop OnLion. Responsible for creating a Goods Confirmation to confirm the physical receipt of goods delivered to a central location. In some instances,</td>
</tr>
<tr>
<td>Approver</td>
<td>Approves shopping carts, contracts, RFx, and purchase orders in their department or area.</td>
</tr>
<tr>
<td>Procurement Substitute</td>
<td>Can view, edit, or delete a shared shopping cart prior to ordering; also referred to as Team Members.</td>
</tr>
<tr>
<td>Purchasing Accounts Payable</td>
<td>Posts invoices against purchase orders.</td>
</tr>
<tr>
<td>Buyer</td>
<td>Responsible for procurement processes such as purchase orders, contracts, and competitive bidding. This is a central role for procurement staff.</td>
</tr>
<tr>
<td>Central Receiver</td>
<td>Responsible for creating a Goods Receipt to confirm the physical receipt of goods delivered to a central location.</td>
</tr>
</tbody>
</table>
Procure-to-Pay Process

The process starts when an item is placed in the shopping cart by a shopper. Additional information is provided about the purchase, then the shopping cart is routed for approvals. The buyer will determine if a contract or competitive bid is necessary based on the goods/services requested. A purchase order is created, either automatically or by the buyer. Either the shopper or a central receiver confirms the receipt of goods. Upon receipt of the supplier invoice, Purchasing Accounts Payable posts invoices against purchase orders and SAP verifies a three-way match. The supplier receives payment.

Shopper Overview

The Shopper role in Shop OnLion is responsible for creating a Shopping Cart to purchase goods or services from a particular supplier. Shopping Carts are line item driven and the Shopper can order items from multiple suppliers in one cart.

Shopping Methods: Catalog, Contracts, and Free Text

- **Catalog**
  - Used for the University's highest volume suppliers
  - Shoppers "punch-out" to the suppliers' catalog website

- **Contract**
  - Used to select line items from established University contracts within Shop OnLion environment

- **Free Text**
  - Used when items cannot be found in catalogs or contracts
Goods Confirmation / Receipt
The Shopper role in Shop OnLion is responsible for creating a Goods Confirmation / Receipt to acknowledge the physical receipt of materials or services from suppliers.

The Goods Confirmation is created by a majority of the shoppers at the University including:
- Shoppers
- Goods Recipient identified on the Purchase Order
- Procurement Substitutes

The Goods Receipt is create by a small select group of individuals at the University including:
- Central Receiving (e.g. ARL Receiving Department)

More in-depth information regarding the Goods Confirmation / Receipt can be found on Step 5 of the Shop OnLion Learning Path – Create Goods Confirmation / Receipt.

Types of Shoppers: Occasional or Frequent
Shoppers may identify themselves as either an occasional shopper or a frequent shopper.

Occasional Shopper
- Process fewer than 10 orders a month
- Primarily shop punch-out catalog suppliers
- Rarely charge multiple accounts on a cart

Frequent Shopper
- Initiate requests for both catalog and non-catalog orders, including unique supplier quotes
- Support a large number of individuals and shop on behalf of others
- Split accounting across multiple budgets or units on a cart

Shop OnLion Learning Path
A Shop OnLion Learning Path has been created to assist shoppers with shopping. Please review and complete all of the steps in the learning path.
- Step 1: Review Web-based Training Courses
- Step 2: Set-up Shop OnLion Settings
- Step 3: Create a Shopping Cart
- Step 4: Review Shopping Cart Approvals and Rejections
- Step 5: Create Goods Confirmation / Receipt
Step 1: Review Web-based Training Courses

Prior to creating your first shopping cart it is imperative to review the web-based training available to you.

There are two Overview courses that are recommended for all shoppers at the University. The SAP Overview and Navigation course introduces end-users to topics such as basic SAP terminology and navigating the Fiori Launchpad. The Procurement Overview course includes key topics such as the end-to-end procurement process, accessing Shop OnLion, and shopping cart settings.

Review:

SAP Overview and Navigation

Procurement Overview

As previously mentioned, a shopper can be classified in one of two categories – an Occasional Shopper or a Frequent Shopper.

Occasional shoppers typically process fewer than ten orders a month, primarily shop using the punch-out catalog suppliers, and rarely charge multiple accounts on a cart. Frequent shoppers typically initiate requests for both catalog and non-catalog orders, support a large number of individuals, shop on the behalf of others, and split accounting across multiple budget or units on a cart. It is recommended that you review the web-based training course for either the Occasional Shopper or the Frequent Shopper.

Review:

Occasional Shopper: Shopping Cart Creation

Frequent Shopper: Shopping Cart Creation

Step 2: Set-up Shop OnLion Settings

Shop OnLion Settings are additional settings that should be set prior to creation of your first shopping cart. Not entering settings means default data must be entered manually for each item in the shopping cart.

Default Delivery Address: Before creating your first shopping cart, you must establish your default address which will be used in each of your orders, unless you change it for a specific order. If the default address is not correct, suppliers will not deliver your order accurately. By default, the shopping cart delivery address is a business area level delivery address. Therefore, it is important to update your personal default delivery address to ensure the Shopping Cart items are delivered to you.

Review:

Personal Settings – Default Delivery Address

- This transaction allows users to edit the default delivery address for shopping carts.
Team Shopping and Procurement Substitutions: The SAP procurement process introduces Team Shopping. With Team Shopping, two or more shoppers on the same team can have access to each other’s carts. Team members can also be referred to as Procurement Substitutes. Procurement Substitutes can view, edit, or delete a shared shopping cart prior to ordering. Procurement Substitutes are set up in SRM User Settings within Shop OnLion. It is important to point out the purchasing spend authorization amount of the shopper who submits or orders the shopping cart is used in the approval workflow processing. Carts rejected during the approval workflow are returned to the person who submits or orders the cart.

Review:

Create Procurement Substitutions

- This transaction allows users to assign procurement substitutes for workflow and to define team shopping access.

Step 3: Create a Shopping Cart

Now that you’ve reviewed the web-based training and set-up your Shop OnLion settings, you’re ready to create a shopping cart.

Now that you’ve reviewed the web-based training and set-up your Shop OnLion settings, you’re ready to create a shopping cart.

1. Review the information located below about Occasional and Frequent shoppers.
2. Decide which type of shopper you identify as.
3. Review the material on the respective page.

Occasional Shopper

- Process fewer than 10 orders a month
- Primarily shop punch-out catalog suppliers
- Rarely charge multiple accounts on a cart

Frequent Shopper

- Initiate requests for both catalog and non-catalog orders, including unique supplier quotes
- Support a large number of individuals and shop on behalf of others
- Split accounting across multiple budgets or units on a cart
Occasional Shopper

Congratulations – you’ve identified yourself as an Occasional Shopper. This means that you tend to shop fewer than 10 times a month, primarily shop from punch-out catalog suppliers, and rarely charge multiple accounts on a cart.

There are two main types of shopping carts that Occasional Shoppers can create:

1. Catalogs and Contract
2. Free Text

All requests for material and/or services begin with creating a Shopping Cart in Shop OnLion. Shoppers can create the cart and include a high level of detail including the financial information and source of supply. Some Shopping Carts are subject to an approval workflow by one or more approvers.

Review:

**Shopping Cart – 3 step Catalog and Contracts**

- This transaction is a basic shopping cart creation function that provides access to Lion Marketplace catalogs and available contracts.

**Shopping Cart – 3 step Free Text**

- This transaction provides a basic shopping cart creation function that allows users to describe items and suggest a preferred supplier when the items cannot be found in the Lion Marketplace or on a contract.

Frequent Shopper

Congratulations – you’ve identified yourself as a Frequent Shopper. This means that you tend to initiate requests for both catalog and non-catalog orders, support a large number of individuals and shop on behalf of others, and split accounting across multiple budgets or units on a cart.

There are three main types of shopping carts that Frequent Shoppers can create:

1. Standard Lion Marketplace Punch-out Catalog
2. Standard PSU Contracts
3. Free Text

Review:

**Shopping Cart – Standard Lion Marketplace Punch-out Catalog**

- This transaction describes the standard shopping function and screens when used to shop Lion Marketplace.

**Shopping Cart – Standard PSU Contracts**

- This transaction describes the standard shopping function and screens when used to shop from contracts. Contracts may be Penn State wide or department specific.
Shopping Cart – Standard Free Text

- This transaction provides basic and complex free-text item purchasing using the standard shopping cart function and screens. The full-feature shopping screens may be needed if the purchase requires non-standard processing, many items, or the shopper is an experienced and/or high-volume shopper.

Additional Options for Occasional and Frequent Shoppers

Change Delivery Address

When creating a shopping cart, you may need to change the Delivery Address if it is different from the Default Delivery Address that you set up in Step 2 or add additional information. This can be done on the Delivery Address/Performance Location tab while creating your shopping cart.

Note: Items ordered using a Lion Marketplace catalog must all be delivered to a single delivery address per order.

When updating the Delivery Address please take note of these important items:

1. Validate the delivery address details for each and every order created.
2. Contact information is helpful; add your phone number and / or email address.
3. Provide additional detail to help ensure correct delivery. For example, your room or floor number.
4. Use the ‘Care Of’ line (C/O) if items are to be delivered to someone other than the shopping cart creator.

Review:

Delivery Address Search

This transaction describes the process for locating an approved delivery address using the search capabilities and Penn State location code customization in a shopping cart.

Use Supplier Not in System

When creating a FREE TEXT shopping cart, you may find that a supplier you wish to use is not listed as a Preferred Supplier. It is recommended that you complete the following steps to continue the shopping cart.

1. Contact the supplier to see if they have registered to become a University supplier.
2. Save the shopping cart and wait until the supplier confirms they have been added a a University supplier (if possible).
3. If waiting is not an option, indicate in the Internal Notes field when creating a Free Text Shopping Cart that the supplier has been asked to register, then proceed with seeking approval on the shopping cart.
Step 4: Review Shopping Cart Approvals and Rejections

Once ordered, the Shopping Cart is routed to the appropriate Approvers through workflow. The Approver reviews the Shopping Cart and can either accept it or reject the Shopping Cart.

View Approval Process

1. Using Active Queries on the Requisitioning Tab in Shop OnLion, locate your shopping cart and click the shopping cart number to display the cart.

2. Click on Display/Edit Agents next to Approval Process in the General Data section.

3. The Approval Process window will open. If the line shows a Received On but no Processed On, the approval step has not yet been completed (i.e. this is the current approval step). As soon as the current approver takes action the cart will either a: move on to the next step in the sequence (if approved) or b: return to the requestor (if rejected)
Edit Rejected Shopping Cart

If a shopping cart is rejected, the cart is sent back to the user who originally completed the cart which initiated the approval workflow.

1. Using the Home Tab in Shop OnLion, click Work Overview. The rejected Shopping Cart should appear in your Work Items list.
   
   **NOTE:** if you do not see your rejected shopping cart, see Missing Work Items.
2. Click Accept Decision / Adjust Shopping Cart Number...

3. The Accept Changes to Shopping Cart screen will open in a new window. Click Edit.

4. A warning message will pop-up to warn you that editing the shopping cart will re-start the approval process. Click OK.
5. The cart is now editable. Review the Approval Note section to learn more about why the cart was rejected and what changes are requested.

6. When you have finished making all of the necessary edits and are ready to resubmit the cart into the approval workflow, click Proceed. This will re-start the approval process back at the beginning, with the system re-calculated the appropriate approvers based on the edited information.

**Missing Work Items**

1. If you do not see any work items in your work overview, there may be search criteria limiting your view. Click the Show Quick Criteria Maintenance button.
2. Ensure New and In Progress Work Items is selected in the Show drop-down list. Click Apply to refresh the search results with any newly selected criteria.

Step 5: Create Goods Confirmation / Receipt

Once your Shopping Cart is approved, and purchasing has sent a purchase order to the supplier, the supplier will fulfill your order and you will receive the materials or services. However, your role in the Procurement process is not complete until a Goods Confirmation / Receipt is processed. The Goods Confirmation / Receipt acknowledges the physical receipt of materials or services received from Suppliers.

Creating the Goods Confirmation / Receipt confirms the following:

- the ordered items are correct,
- the quantities are correct,
- the materials are in good condition,
- and services are received in accordance with the requirements of the purchase order (PO).

SIMBA uses a process called a three-way match. The purpose of the three-way match is to avoid paying incorrect invoices. Three-way matching compares the materials/services, quantities, and pricing that appear on the Supplier’s invoice with the information on the PO and Goods Confirmation / Receipt.

**NOTE:** Failure to create a Goods Confirmation / Receipt after the items are delivered will result in a delayed payment to the Supplier.
Almost all Purchase orders will require a Goods Confirmation / Receipt. The exceptions include Lion Marketplace orders with a total value less than $5000.

Goods Confirmations are processed by the following roles:

- Shoppers,
- Good Recipient identified on the Purchase Order, and
- Procurement Substitutes on team carts.

Goods Receipts are processed by the following roles:

- Central Receiving.

In most situations the Shopper or the Goods Recipient identified on the Purchase Order will receive the good or service, and therefore, is the most knowledgeable on what should be recorded in SIMBA.

**Review:**

**Goods Confirmation**
- This transaction should be used by Shoppers, Goods Recipient identified on the Purchase Order, and Procurement Substitutes on team carts.
- This transaction creates a Goods Confirmation, which is required for free text purchases and Lion Marketplace purchase orders with a total value greater than $5000.

**Goods Receipt**
- This transaction should be used by those in Central Receiving at the University (e.g. ARL Receiving Department).
- This transaction creates a Goods Receipt, which is required for free text purchases and Lion Marketplace purchase orders with a total value greater than $5000.

**Cancel a Goods Confirmation**
- This transaction allows users to cancel an existing Goods Confirmation against a Purchase Order line item.

**Cancel a Material Document**
- This transaction allows users to cancel an existing Goods Receipt against a Purchase Order line item.

**Additional Materials**

Additional materials for Shop OnLion can be found on the SIMBA website ([www.simba.psu.edu](http://www.simba.psu.edu)) under the Resources tab.

If you need assistance with Shop OnLion, please take the following steps:

1. Review the available resources and/or visit the FAQ page.
2. If assistance is still required, contact your Super User(s). Contact your Financial Officer if you do not know who your Super User is.
3. Your Super User will assist you or escalate to the SIMBA Team if necessary.
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