SunRISE

HigherMarketsTraining
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Introduction
What benefits can you expect from SunRISE™?

- Savings: Online catalogs with negotiated pricing
- Convenience: A paperless requisition process, accessible anywhere and anytime
- Speed: Automated approvals and electronic links to suppliers
- Training classes, online assistance, and a live help desk

Three Types of Shopping

- **Lab Stores** – catalog updated monthly
- **Hosted Catalogs** – static catalogs updated periodically by the supplier
- **Punchout Catalogs** - gives you an alternative to static catalog files. Punchout catalogs are live, interactive web-based catalogs that are regularly maintained by the supplier

Module 1: The Basics

Learning Objectives

In this module, you will learn how to:

- Log in to the system
- Navigate through the system
- Create a profile

Logging In

For training purposes, you have already been logged in to the training site. To log in from your office you will:

1. Launch your **Web browser** to [www.asu.edu/sunrise](http://www.asu.edu/sunrise)
2. Click on the Login button
3. Enter your ASUrite
4. Enter your **Password** in the Password field.
5. Click **Login**.

Navigating

Navigation options appear as tabs at the top of the screen. The user can quickly navigate by clicking the appropriate tabs.
Home: The first screen after login where you can begin tasks.

Favorites: Allows you to store and access frequently ordered items.

Search Tools: Allows the user to start shopping by choosing a category to search on, or a punch-out catalog to shop from.

Requisitions: Access to shopping carts (current, draft and new), approvals for approvers, and requisition/order history.

Settlement: Allows the user to search for a purchase order so a receipt document can be processed.

Inventory: Allows the user to view internal campus inventory.

Profile: The user sets personal information for Ship To addresses and AGENCY/ORG codes here.

Profile Update
The profile only needs to be set up one time unless your information changes. Changes for specific orders can be made at any time of creating a requisition.

- Your user profile allows you to:
  - Choose from drop down menu Ship To code(s) with nicknames.
  - Select one of the Ship To codes to be the default code
  - Enter a contact name (this will appear on shipping label)
  - Enter room number and department name (these will appear on shipping label)
  - Setup default AGENCY/ORG information (this should be your most frequently used AGENCY/ORG codes)
  - Add additional AGENCY/ORG codes that your department will be using

Modifying Ship to Addresses:
When modifying the contact information of a Ship To address, remember the following guidelines:

- **Always** enter a contact name (your user name is the default). This is important because it will print on the shipping label.
- Use only one Ship To address per requisition. This will avoid incurring additional shipping charges.

Setting AGENCY/ORG Codes:
See your Business Manager for your approved AGENCY/ORG list. Remember that not all departments require Activity and Location values in the AGENCY/ORG
The SunRISE system allows you to use drop down menus to choose appropriate Agency/Org and Object/SubObject codes for an order. Through the Profile setup process you can choose your approved Agency/Org from a larger system list and add them to your drop down menus to make requisition creation quick and easy.

**NOTE:** See *Quick Reference Guide to Profile Setup* in the *Special Information section.*

### Exercise 1: Updating Your Profile

Follow your instructor’s directions to do this hands-on exercise.

<table>
<thead>
<tr>
<th><strong>ACTION (You Do)</strong></th>
<th><strong>SYSTEM RESPONSE (Comments)</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Click the More &gt;&gt; pull down on the right hand side of your screen</td>
<td>The Profile screen appears, showing a list of profile categories under the Users Settings tab</td>
</tr>
<tr>
<td>2. Click on each of the profile categories to review and update your profile.</td>
<td></td>
</tr>
<tr>
<td>3. To add a new Ship To address to your profile click the Purchasing tab, then the Addresses category</td>
<td>The Addresses dialog box appears</td>
</tr>
</tbody>
</table>
4. Click the Select Addresses for Profile button - make sure the Ship To tab is selected.

Notice that on the left is a list of your current addresses. The bolded address is currently your default (see the following illustration).

5. To add or remove a Ship To address for your profile - Click Select Addresses for Profile.

A list of search results appears which shows all of the Ship To addresses presently set up in the system.

6. Select the address or addresses where the items you purchase are to be delivered

Notice that the Department name now appears in the Nickname field and other address information has been entered in the appropriate address fields.
7. Put a check in the **Default** checkbox for the address you are going to be using with more frequency.

8. Fill in the Attention (**ADV ID and name - ex: AS04 Andrea Streed**), Building and Room # fields. Click **Save**.

9. To add a **Bill To** address to your list, Click on the Bill To tab.

<table>
<thead>
<tr>
<th>ACTION (You Do)</th>
<th>SYSTEM RESPONSE (Comments)</th>
</tr>
</thead>
<tbody>
<tr>
<td>7. Put a check in the <strong>Default</strong> checkbox for the address you are going to be using with more frequency.</td>
<td>This will make this address the default in the Shipping Addresses list</td>
</tr>
<tr>
<td>8. Fill in the Attention (<strong>ADV ID and name - ex: AS04 Andrea Streed</strong>), Building and Room # fields. Click <strong>Save</strong>.</td>
<td>This information is necessary for the shipping label and will help in correct and timely delivery. The new address now shows on the Shipping Addresses list and is bolded, indicating it’s the default.</td>
</tr>
<tr>
<td>9. To add a <strong>Bill To</strong> address to your list, Click on the Bill To tab.</td>
<td>Notice that on the left is a list of your current addresses. The bolded address is currently your default (see the following illustration).</td>
</tr>
</tbody>
</table>
10. Click **Select Addresses for Profile**. The available Bill To addresses will appear in a drop down menu.

11. Select the correct address. Mark this address as your **Default** address.

Set up your Department Agency Orgs in your profile for ease of use in ordering.

12. Click the **Purchasing** tab, then the **Custom Fields** tab then the Edit button.
ACTION (You Do) | SYSTEM RESPONSE (Comments)

**13. Click Create New Value.**

A Search For Value box appears to the right of your current Agency/Org list.

**14. Option 1:** In the Search For Value section, in the Value field, type: the Agency/Org that you will be using

**15. Option 2** Click Search and select the appropriate Agency/Org.

Results are returned depending on the Agency/Org and your Results per Page number selection.
16. In the Select. Column you can choose one or more of the values shown. Click Add Value to add to your profile. The New Value section reflects the description for your new code (see the following illustration).

17. Repeat steps 13 though 6 to add Agency/Orgs as needed.

18. Click the Close button to return to the Codes list.

Learning Summary

You have just learned how to:

- Log in to SunRISE
- Navigate in the system
- Update your profile
Module 2: Shopping and Creating a Requisition for Catalog Orders

Learning Objectives
- In this module, you will learn how to:
  - Request items from a hosted catalog
  - Complete a requisition
  - Change Agency/Org codes
  - Select Object/Subobject Codes
  - Change Ship To information
  - Submit the cart

Overview
Follow these steps to easily create a requisition:

Check for an Active Cart:
Before beginning to shop, it’s important to first check the Cart Status field in the upper right-hand corner. You can begin shopping if:
- The cart status indicates “No Active Cart”
- A cart is active but the cart is empty (total=$0.00 and 0 items)
- A cart is active and has one or more items and you wish to add more items to the same cart.
**Shopping the Catalogs**

Access to online catalogs is provided to make shopping easy. This can be done from the Home Page.

- **Lab Supplies**: The Laboratory Catalog Search and Specialty Laboratory Searches allow full search capabilities within the hosted science catalog, but these options do not search the Lab Supplies Punchout Catalogs.
Though each supplier’s catalog may vary in appearance and functionality, use these tips to help you navigate an online catalog:

- Use the Browse function to look at category and items.
- Use the Search function to locate items directly.
- To select an item, enter a quantity and click or

  Add To Current Cart

- Complete the checkout process to bring your items back to SunRISE.
- Specific tips by supplier can be found on the SunRISE Web site.

**Exercise 2: Basic Shopping**

Follow your instructor’s directions to do this hands-on exercise. In this exercise you’ll order an item that you already know the catalog number for.

<table>
<thead>
<tr>
<th>ACTION (You Do)</th>
<th>SYSTEM RESPONSE (Comments)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. From the <strong>Home</strong> Tab, check the Cart Status field in the upper right-hand corner to see if you have a cart currently active.</td>
<td>If it says No Active Cart, you can start shopping. You can also add to an active cart that is either (1) empty ($0.00 and 0 items) or (2) has products in it from other suppliers.</td>
</tr>
</tbody>
</table>
2. Type 410503 in the Product Search Catalog No. (SKU) field. This is the catalog number (SKU) for Hot Hand Protector Gloves from BioWorld.

3. Click Search.
4. In the **Quantity** field, type: 4  
   - click the select box  
   - click cart icon under “Add to Current Cart”  
   Item(s) is now Added to your Cart.

   An updated cart appears with number of items selected and total dollar amount (see below).

5. Click **Carts** to checkout

   A Cart screen displays showing the current information associated with your cart. Notice the series of Action Buttons at the top. There is also an editable Header section showing Internal and Supplier information.
R & D Tax Exempt Items

When purchasing Research & Development (R & D) tax exempt items the taxable box will need to be turned off by deselecting it.

When the item is flagged as non-taxable the correct object/subobject code must be entered in the Codes section. The only non-taxable codes to be used are 781091(capital), 732591(non-capital) or 781046 (fabricated). If any other object/subobject code is used the document will be rejected in the Advantage System. The red X in the taxable field indicates this line item has been selected as a non-taxable item. The form can be printed by going to: http://www.asu.edu/purchasing/forms/taxexmpt.pdf
### ACTION (You Do)

6. To create a cart nickname for reference, in the Cart Details section, highlight the assigned Cart Name and type a nickname of your choice. 

7. For the purpose of this exercise you will accept the default Header and item information without changes. Click the **Review** button to move on to the next action in the submission process.

### SYSTEM RESPONSE (Comments)

Naming your cart will help you identify it more easily later on.

A detail of the Hot Hand Protector Gloves line item in your cart appears.
**ACTION (You Do)**

8. Examine the details of your cart, checking the Ship To, Agency/Org and Object/Subobject information. In particular, notice any warning messages in yellow highlight indicating that required information is missing.

9. If there is any missing information (yellow highlights) edit the cart details. For code errors click one of the **Codes** buttons and choose from the drop down menus or add an Agency/Org in the free form field (upper case). ***If item was flagged for tax exempt you must use 781091, 781046 or 732591.*** For Ship To errors click one of the **Ship To** buttons.

---

**SYSTEM RESPONSE (Comments)**

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### Review - Training Cart

- **Add Products**
- **Edit Cart**
- **Review**
- **Taxes/S&H**
- **PR Approval**
- **Submit**

---

#### Header Information

<table>
<thead>
<tr>
<th>Description</th>
<th>General</th>
<th>Internal Info</th>
<th>External Info</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Prepared by** ANDREA STREED
**Prepared For** ANDREA STREED

---

#### Edit details - for all products

- **Ship To**
- **Bill To**
- **Delivery**
- **PO Number**
- **Credit Card Number**
- **Codes**
- **Internal Info**

---

#### Cart Details - Training Cart

**External Purchases**

- **Taxable**
- **Product Name**
- **Supplier**
- **Catalog No.**
- **Unit Price**
- **Qty/ UOM**
- **Extended Price**

---

#### Ship To Information

- **Arizona State University**
  - P.O. Box 958912
  - Tempe, AZ 85287-5912
  - United States
  - **PO Number**
    - To Be Assigned
  - **Credit Card Number**
    - Credit Card Number
  - **Card Number**
    - Select a credit card from your list
  - **Codes**
    - Codes

---

#### Agency/Org

- **A required customs field has not been entered, or you must enter a valid value for the related custom fields. Click Error for more details.**

---

#### Object

- **A required customs field has not been entered, or you must enter a valid value for the related custom fields. Click Error for more details.**

---

#### Sub-Object

- **A required customs field has not been entered, or you must enter a valid value for the related custom fields. Click Error for more details.**
10. Click the **Save and Apply to Selected Products** button to save changes.

When each section of information has been corrected click the Return To Review button to return to the Cart Review

10. Click the **PR Approvals** action button at the top of the Cart screen.

A graphic of the workflow of your order appears (see below). Your order will now proceed to the Agency/Org Approver who will approve this order.
14. Once you’ve reviewed the workflow, you’re ready to submit your order. Click on the **Submit** action button. A screen appears indicating that your requisition is complete and showing the assigned requisition number. The screen also shows the cart name that the requisition was created from. You can also print a copy of your requisition from this screen.

15. To make finding your requisition easier later on, write down the system-assigned number in the space below:

Requisition # ________________________
### Exercise 3: Comparison Shopping

<table>
<thead>
<tr>
<th>ACTION (You Do)</th>
<th>SYSTEM RESPONSE (Comments)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. From the <strong>Home</strong> Tab, check the Cart Status field in the upper right-hand</td>
<td>If it says No Active Cart, you can start shopping. You can also add to an active cart</td>
</tr>
<tr>
<td>corner to see if you have a cart currently active.</td>
<td>that is either (1) empty ($0.00 and 0 items) or (2) has products in it from other</td>
</tr>
<tr>
<td></td>
<td>suppliers.</td>
</tr>
<tr>
<td><strong>Select Draft Cart or Add Item to Cart</strong></td>
<td></td>
</tr>
</tbody>
</table>

In the Product Search / **Stores Supplies** – Product Description – include any of the words field - enter **beaker**. In the Product Size field enter 100 and from the pull down select L --- liter.

Search fields will show all that relates to beakers / 100 L

3. Click **Search**

The system will pull items meeting the set criteria.
4. Select items that you would like to compare. From the drop down list select **Compare**. Click **Go**

Selected items will appear side by side for easy comparison.

5. Input quantity for items that you wish to purchase
Understanding the Cart Screen

**Header Information**

- **Cart Name**: 2005-08-27 astreed 01
- **Items Ordered**: View Active Cart

**Internal Information** (for ASU SunRISE users only to view):

User can:
- Enter a **Description** to the document
- Add an internal note (optional). Click on **attach internal note**, enter up to 1,000 characters of information, click **Attach Note**, click **Close** to return to cart.
- Include an attachment: Click on **Attach/Link** and attach the filename or the URL you would like to attach to this order.

**NOTE:** See Guide for Entering Header Information in the Special Information section.
Cart Detail Changing the Cart Name:
In the middle of the screen is the cart name. The default cart name is the creation date and the user name (assigned by the system). It is highly recommended that you change the cart name to include your mail code.

To change a cart’s name: Highlight the default cart name in the Cart Details section and type your mail code and name.

NOTE: Change your cart name to one that you can easily recognize. The Cart Name information is for reference only. (The supplier will not see this.)

NOTE: See Guide for Entering Cart Detail Information in the Special Information section.

Adding to Favorites / Removing a Line Item:

By clicking the Select box of a line item, you can use the Details Drop Down menu to either add the selected item(s) to your Favorites list or remove the item(s) from your cart.

To add items to your Favorites: Click in the Select box on the item detail and click GO. In the dialog box click Submit, and then Close. Click the Save Updates action button. This will add the selected items to your list of favorites.
NOTE: Be aware that when you add a favorite to your cart, you are also adding the current pricing, which might become obsolete. It’s a good idea to update your Favorites list on a regular basis.

To remove a line item: Click in the Select box on the item detail, select Remove Selected Item from the Details Drop Down box and select GO. Click the Save Updates action button.

Exercise 4: Attaching an Internal Note and Changing the Cart Name

<table>
<thead>
<tr>
<th>ACTION (You Do)</th>
<th>SYSTEM RESPONSE (Comments)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. In the Header section for your cart, under Internal Info, click on Attach Internal Note. Type a short note about the order or supplier that you would like to share internally only.</td>
<td>The Internal Note dialog box appears (see below).</td>
</tr>
<tr>
<td>2. In the Attach Note dialog box, click Attach Note, and then click Close.</td>
<td>The Header is automatically updated with the note and a Note icon appears.</td>
</tr>
<tr>
<td>3. To create a cart nickname for reference, in the Cart Details section, highlight the assigned Cart Name and type a nickname of your choice.</td>
<td>The system-assigned cart name is replaced with your new nickname.</td>
</tr>
<tr>
<td>4. Click the Save Updates button.</td>
<td>This saves everything you have done so far. (See note below.)</td>
</tr>
</tbody>
</table>

NOTE: Always click the Save Updates button before changing tasks.
To enter the Review screen, click the **Review** action button.

In the Review screen you have the choice of editing details for all line items or editing the details of only selected line items.

**Edit Details for All Products:**
Here you can edit **Ship To** and **Bill To** addresses, **Delivery**, **Credit Card Number**, **Agency/Org Codes** and **Internal Info** for all items in your cart.

**NOTE:** Remember that there should be only one supplier per cart, so any changes to the Ship To Address would be made for all items in the cart using the Ship To button in the Review for All Products section.

**External Purchases Section:**
Here you can see a detail of each line item in your cart showing the default information from your profile. By clicking on the appropriate button, you can change that information for that particular line item.

**NOTE:** Always check the AGENCY/ORG codes and make sure they are correct and no yellow warning signs appear.

**NOTE:** See **Guide for Entering Line Item Information** in the **Special Information section**.
Exercise 5: Using the Edit Detail for All Products Option

<table>
<thead>
<tr>
<th>ACTION (You Do)</th>
<th>SYSTEM RESPONSE (Comments)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Click the <strong>Review</strong> action button.</td>
<td>A detail of each line item in your cart appears showing the default information from your Profile. Notice the error message in yellow. We will be addressing this later in class.</td>
</tr>
<tr>
<td>2. If necessary, scroll to the <strong>Edit Details—for all products</strong> section.</td>
<td>Here you can make changes to all items in your cart (see below).</td>
</tr>
</tbody>
</table>

3. In the Edit Details for All Products section, click the **Codes** button.  
   This accesses the AGENCY/ORG Codes dialog box, where you can make changes to codes for just this cart.

4. Now we’ll change the Agency/Org for all products.  
   From the drop down menu in the Agency/Org field, select the code you entered in the Profile exercise.

5. Now access the Object code field drop down and choose the appropriate Object code for your products.

6. Now access the Object code field drop down and choose the appropriate Obj-Subobject code for your products.

7. Click **Save and Apply to Selected Products**.  
   The code changes you’ve made are applied to all your products.

8. In the upper right-hand corner of the Window, click the **Return to Review** button.  
   You are returned to the Review screen of the cart.

**NOTE:** To change the AGENCY/ORG, Object and Sub-Object information **per line item**, click on the Codes button located within the line item you want to change.
Completing the Cart

Checking the Approval Process:
The PR Approvals action button accesses a graphic of the projected workflow of your project. All of your carts will show an AGENCY/ORG Authorization step. Depending on the size and type of the order, other steps may also be included.

NOTE: In Step 1 Agency/Org approval there may be more than one approver preset for you in the system. This information was provided by your Budget Admin or Business Manager during setup. Select from your list of available financial approvers in the drop down menu.

Submitting the Cart: To Submit your cart, click the Submit action button. The next screen will show you your system-assigned requisition number, the cart name from which the requisition was created, and the current status of the requisition. There is also a link to the My Requisitions folder. From this screen you may also Print the Requisition for your files (after printing your requisition click on the X to close this screen.)

NOTE: Before submitting a cart, always preview all the cart information.
### Exercise 6: Completing the Cart

<table>
<thead>
<tr>
<th><strong>ACTION (You Do)</strong></th>
<th><strong>SYSTEM RESPONSE (Comments)</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Scroll to the top of the Cart screen and click the <strong>PR Approval</strong> button.</td>
<td>A graphic of the workflow for your order appears (see below).</td>
</tr>
</tbody>
</table>

![Workflow Graphic](image)

2. To change your cart into a requisition, click the **Submit** button.  
The New Requisition screen appears, giving you the assigned requisition number, cart name from which the requisition was created, and the current status of the requisition. There is also a link to the My Requisitions folder (this feature will be discussed later).

3. To make finding your requisition easier later, write down the assigned number in the space below:

   ![Requisition Screen](image)

### Learning Summary

You have just learned how to:
- Request items from an online catalog
- Complete a requisition
- Change AGENCY/ORG codes
- Change / Select Object/Sub-Obj Codes
- Change Ship To information
- Submit the cart
Module 3: Tracking Your Requisition

Learning Objectives

In this module, you will learn how to:

- Search for your requisition
- Identify the status of your requisition
- Access Order History

Searching for Requisitions

My Requisitions Folder:
Click the Home tab then my requisition in the vertical menu of the page to access a list of all your requisitions to-date. You can use this list to view and track the status of your requisitions. A legend to the left of the list will help you interpret the various status icons.
You can simplify your search by:

- Sorting the information in any column by clicking on the triangle under the column header.
- Limiting your requisition search by using the Status drop down menu to choose parameters to limit your search.

OR

My Requisitions Folder:
Click the Carts tab then my requisition in the horizontal menu of the page to access a list of all your requisitions to-date. You can use this list to view and track the status of your requisitions. A legend to the left of the list will help you interpret the various status icons.
All (results in all your requisitions, regardless of status) other requisition status options include

Pending
Completed
Rejected (only requisitions that have all lines rejected will display)
Withdrawn.
(To view the details of a requisition in the list, click the requisition number. The requisition screen will have four tabs to access various information about the requisition)

• **Summary**: Provides the Header information, the cart name, PO number, and basic information on the items ordered.
• **Details**: Provides line-item detail information on the Ship To and Bill To addresses, supplier information, PO number, AGENCY/ORG codes and internal information.
• **Approval Status**: This tab gives a graphical representation of the workflow process and status.
• **History**: This tab shows a chronological history of the actions taken on the requisition. It includes the date and time, the user name, the action taken and the steps, as well as any notes.
Exercise 7: Using My Requisitions

**ACTION (You Do)**

1. From the Home screen, click the **my requisitions** folder.

2. To view the details of your recently created requisition, locate it in the list and click on its number.

3. Click the **Details** tab.

4. Click the **Approval Status** tab.

5. Click the **History** tab.

**SYSTEM RESPONSE (Comments)**

The My Requisitions list appears. Notice that the default is for the list to be sorted by Date/Time, most recent first (indicated by the filled downward-pointing arrow below the column header). Notice, too, that the default is to display **All** the requisitions, as indicated by the Status drop down in the upper left-hand corner.

The Requisition's screen is displayed with the Summary tab accessed.

A detailed view of each line item in the requisition is displayed.

The status of your requisition's workflow appears, including the Submission date and the completed AGENCY/ORG authorization.

A list appears showing each action that has to-date been completed for your requisition.
Accessing Order History
You can view order history by clicking the History tab from the home page. Then click on PR History.

PR Search:

In the PR Search screen, be sure the By Requisition tab is selected.
- Enter the Requisition No., Supplier Name, or Catalog No.
- Click Search

You are presented with the PR Search Results. Click on the Requisition No. to view the details of this Requisition.

If you do not know the Requisition No., Supplier Name, or Catalog Number, and want to search any of these, click on the Filters check box. You can now search on the information in the lower half of the screen.
- Click on My Orders
- Click on the Search Status drop down menu
- Enter a start date and an end date for your search.
- Click on Search
You are presented with a list of Requisitions matching your search criteria. Click a Requisition number to view its detail. In the Requisition Detail screen, you can use the following tabs to view specific information: Summary, Details, Taxes/S & H, Approval Status, and History.
**PO Search:**
In the PO Search screen, be sure the by PO No. tab is selected.
- Enter the Purchase Order No.
- Click **Search**
- You are presented with the PO Search Results. From this screen, click on the PO No. to view the details of this PO.
If you do not know the Purchase Order No. and want to search for the Purchase Order No., click on the Filters check box. You can now search on the information in the lower half of the screen.

- Click on **My Orders**
- Click on the PO Status drop down menu
- Enter a start date and an end date for your search.
- Click on **Search**

You are presented with a list of PO’s matching your search criteria.
Click a PO number to view its detail. In the PO Detail screen, you can use the following tabs to view specific information: Summary, Details, Revisions, Receipts, Invoices and PO History.

Learning Summary

You have just learned how to:

- Search for your Requisition and/or Purchase Order
- Identify the status of your document
- Accessing Order History
Wrap Up

SunRISE Web Site  http://www.asu.edu/sunrise
Bringing together all the information you need to order online…
  • Login tab
  • Tips and FAQs
  • Help Documentation
  • System Announcements
  • Support Info
  • Login link to SunRISE system

Next Steps – First Time Users
Walk through the “New User Setup” guide with your trainer

Set your browser privacy settings if required
  • Bookmark the SunRISE site
  • Create your user profile as described in Module 1
  • Discuss any departmental procedures, such as
  • Approvals involved
  • Etc.

TIP: Take a moment to familiarize yourself with the SunRISE site, particularly the SunRISE News section to stay abreast of the latest developments and learn valuable tips on using the system efficiently!

Accessing SunRISE
  2. Click on the Login tab on the left of your screen
  3. Enter your ASURITE and asurite password on the ASU Webauth screen

NOTE: For security reasons, the system will log you out automatically after 30 minutes of inactivity. It is always a good idea to log out whenever you are finished using the system.
Getting Help and Sharing Feedback

Ways to Get Help:

- Visit [https://www.asu.edu/sunrise](https://www.asu.edu/sunrise) and review online info
- Contact our SunRISE Help Desk at 727-RISE (7473)
- Email: sunrise@asu.edu
- Contact the ASU SunRISE System Administrator
- Contact your Business Manager or your Administrative Assistant for assistance with AGENCY/ORG information

Sharing System and/or Training Feedback:

- Send us an email to sunrise@asu.edu
- Contact Andrea (Andy) Streed, SunRISE System Administrator at 965-3270 (astreed@asu.edu) or Bettye Williams, SunRISE System Manager at 965-9161 (bettye.williams@asu.edu)
### Quick Reference Guide for the Approval Process

**Requisition Number**
- Approval Requisition No. 978202

**Requestors Name**
- Click to view approval
- Click to track the requisition’s activity to date

**Summary of item information**
- Click to view the details of the entire requisition

**Ship to Information**
- If any notes to the supplier have been entered they will appear here

**Delivery Information**
- Agency/Org, Object & Subobject that each line is charged to

### Cost Details - Lab Gloves 12/14/06

<table>
<thead>
<tr>
<th>Status</th>
<th>Taxable</th>
<th>Product Name</th>
<th>Supplier</th>
<th>Catalog No.</th>
<th>Unit Price</th>
<th>Qty/Unit</th>
<th>Extended Price</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>✅ ✓</td>
<td></td>
<td>Safetek PF Gloves, L</td>
<td>BioWorld Laboratory</td>
<td>411501</td>
<td>19.90</td>
<td>2</td>
<td>39.80</td>
<td>✓</td>
</tr>
</tbody>
</table>

**Arizona State University**
- PO Number
- Credit Card Number
- Agency/Org

**Ship To**
- Best Carribean Way

**Bill to Information**
- If P-Card was used number will appear here

---

**Special Information**

**Special Information/Quick Reference Guide for the Approval Process**

March 29, 2007
### Ways to Approve a Requisition

Approving a requisition in the SunRISE system is quick and easy. There are two options to access a requisition:

**Step 1 – Access the Requisition**

<table>
<thead>
<tr>
<th>There are two ways to access a requisition:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1)</strong> Option 1 – E-mail Notification</td>
</tr>
<tr>
<td>a) You will receive an email notification that a requisition is pending your approval.</td>
</tr>
<tr>
<td>b) Click on the link and login to SunRISE with your asurite ID and Password. Proceed to Step 2.</td>
</tr>
<tr>
<td><strong>2)</strong> Option 2 – Direct Login</td>
</tr>
<tr>
<td>a) Log into SunRISE through Webauth.</td>
</tr>
<tr>
<td>b) Click on the My Approvals folder on the left-side of the SunRISE screen. Proceed to Step 2.</td>
</tr>
</tbody>
</table>

**From:** Support@sciquest.com  
**Sent:** Friday, January 14, 2005 10:21 PM  
**To:** astreed@asu.edu  
**Subject:** New Pending Approval for Requisition #941969

Re: YOUR APPROVAL IS PENDING FOR REQUISITION # 941969  
Folder: Andrea Streed

Dear Andrea Streed,

The requisition listed above has been submitted for your approval and is located in the folder listed. If the folder is a shared folder, the requisition must first be assigned to your personal folder before approving. The requisition can be accessed for review in “My Approvals” or by selecting the URL below.


If you have any questions with regard to reviewing/approving this requisition, please contact the requestor, or the SunRISE Help Desk.

SunRISE Help desk Contact information:  
(480)- 727-RISE (7473)  
SunRISE@asu.edu

Thank you,  
Arizona State University  
SunRISE@asu.edu

**Step 2 My Approvals Folder**
The **My Approvals** folder contains all the requisitions **Pending** for your review. You can also view any future requisitions by changing the status to **Future**.

To view the details of a requisition, click on the requisition number wish to review.

Assign the requisition to yourself to approve by clicking on the **Assign Button**.
Steps To Approve / Reject a Requisition

Once you have accessed the requisition, simply follow these steps to modify/approve/reject a requisition pending your approval.

Step 3 - View Summary Information

View the summary information

Internal notes and attachments

External notes and attachments

Line item information

Step 4 - View Detail Information

Click the Details tab to review each line item:

Ship To information – where order will be delivered

Supplier Info – for notes

Internal Info - including attachments and notes for departmental use

Codes and AGENCY/ORG – where purchase will be charged
Step 5 - Change AGENCY/ORG code *(if necessary)*

1. Change the AGENCY/ORG information using the drop down stored in your profile or type it in the box.

2. Verify the correct line items are selected and click *Save and Apply to Selected Products.*

3. Click *Return to Review* to go back to the *Detail* tab.

Step 6 - Approve or Reject the Requisition

4. The Summary, Details, Approval Status, and History tabs have the following approval actions available:

5. Approve

6. Reject All

7. The Hold action indicates the Approver needs additional information or time to review the requisition.

8. The Forward to action sends the approval process for a requisition to another Approver. When you forward the requisition, your part of the approval process is complete.
   - The Note provides a pop-up box to add comments which are visible in the History tab.

9. Approvers can also reject line items by checking the box next to the line item and selecting Reject Line Items and clicking Go

Advanced Features:

Utilize a Substitute Approver

If you are going to be out for an extended period of time, *SunRISE* allows approvers to designate a substitute approver. To do this:

1. Click on Assign Substitute
2. Enter in the **contact information**
   (first name, last name and/or e-mail) and select “Search”
3. Click the **radio button next to the appropriate substitute** and select “Choose Selected User”
4. When you return, select “End Substitution”

Please note: The Substitute Approver will not have access to any requisitions currently in your “My Approvals” folder. Therefore, you should either “Approve” or “Forward” any requisitions before you leave.
Quick Reference Guide for Profile Setup

Edit a Ship to address:

1. Click Profile from the dropdown menu or from the SunRISE banner.
2. Click on Purchasing then on the Address tab.
3. Select address for your profile. The address will be entered in the search area.
4. Click Edit.
5. Click on Select Addresses for Profile.
6. Enter your building number or the building text and click Search.
7. Select the appropriate Ship To address by clicking the button for the address.
8. Create a nickname that will help in remembering this address.
9. If you want this address to be the default, click in the Default checkbox.
10. Enter the Contact Name (required).
11. Enter the Room No./Dept Name.
12. Click Save.

NOTE: You can repeat these steps (steps 3 – 10) to add additional Ship To addresses. Your default address will appear in bold under the Shipping Addresses section on the left side of the screen.

Edit AGENCY/ORG Codes:

1. Click Profile from the dropdown menu or from the SunRISE banner.
2. Click Purchasing then the Custom Fields tab
3. Click Codes then the AGENCY/ORG Edit button.
4. Click Create New Value.
5. To set parameters for a search, enter either the Value (agency org – no spaces) for the new code or the description of the account you are searching for.
6. Click Search.
7. From the search results, find the code you want to
add Click in the Select OR click the Select Box in the Title Row to select group that is shown click Add Values

8. Repeat process to add more Agency/Org codes to your profile.

Quick Reference Guide for Punchout Shopping

1. Check for your current cart or create a new cart.
2. Click the appropriate category from the Categories list.
3. Click on the supplier’s icon to Punchout to the specific catalog.
4. Select an item.
5. **Enter a Quantity** and click **Buy** or **Add to Cart** – depending on suppliers wording on their website.
6. Complete the checkout process in the online catalog.
7. Check the **Header information** for your cart and make changes as appropriate.
8. Add items to your Favorites or remove items from the cart as necessary by selecting the appropriate item, choosing the desired action from the drop down menu, and clicking **Go**.
9. Click the **Review** action button to examine the details of your cart.
10. If yellow warning messages appear, add or revise the faulty field.
11. Modify **Ship To** and **Agency/Org** information as required.
12. Click **Save Updates**.
13. Click the **Submit Requisition** action button.
Guide for Entering Requisition Header Information

General (hosted catalogs orders only)

Internal Info Section (hosted catalogs orders only)

The fields in this section are for internal use ONLY. These fields do not print on the purchase order.

1. **Internal Note**: (1000 characters) internal comments as applicable to the requisition or comments for the approvers.
2. **Attachments**: You may attach documents relevant to the requisition for review by approvers. Acceptable file formats are documents created in Microsoft Office, PDF, text files, GIF, JPEG, and TIF. Please be mindful of the file format that you are attaching, since the approver may not have access to a software program to view the file.

External Info Section (hosted catalogs orders only)

The following fields are externalized. These fields will print on the purchase order.

1. **Shipping Instructions**: (100 characters) enter any special shipping instructions.
   - Examples: Ship Next Day Air
   - Ship to arrive by (date)
   - NOTE: Call before delivery

2. **Note to all suppliers**: (1000 characters) Enter information specific to the entire requisition. The supplier will be able to see the note on the purchase order. You can also use this field to indicate the required date by which products must be delivered on campus.
   - Examples:
     - Required date – products must be delivered on campus by March 5, 2005.
     - Notify Joe Smith prior to delivery 965-XXXX.
     - Price per phone quote from Jane Doe (date, time).
     - Notify requestor of any backordered items.

3. **Attachments**: You may attach documents relevant to the requisition for review by the supplier.
   - Examples:
     - Spec documents
     - Price Quotes
Guide for Entering Cart Detail Information

Cart Details

1. **Cart Name**: We prefer you to name the cart with your Mail Code and abbreviated Building name (5212 USB). By default, the system will label your cart with the date and your asurite – “2005-04-26 asurite 01”.

2. **Remove Selected Item(s)**: Click in the Select box on the item detail, select **Remove a Line Item** from the Details drop down box and select GO. Click the **Save Updates** action button.
   
   o **Remove All Items**: Select this option and click GO to remove all items from the cart.

Basic Definitions

**SunRISE** is the unique name given to the Arizona State University Research Enhancement System. The software company for SunRISE is **SciQUEST**. The terms **SunRISE**, E-Commerce, E-Purchasing, On-Line Shopping, Web-Based Shopping, Higher Markets and **SciQuest** are all synonymous.

**Current Cart** is the term used within the SunRISE system for a requisition in progress. Each supplier within the system might use different terminology for the same function. Some examples are **Request**, **Current Cart**, **Shopping Basket**, **Requisition** and **Current Order**. Whichever term is used, all are means for bringing items from a specific supplier back into the SunRISE system to create a requisition and subsequently a purchase order.

**Punch Out Catalogs** are suppliers that maintain their own web pages, while allowing end users access through SunRISE. **Punch Out Catalogs** may also be referred to as **On-Line Catalogs**, **Web Catalogs** or by the **supplier name**, i.e. Fisher, VWR, Spectrum, etc.

**Error Messages** in SunRISE will appear in **yellow highlight** and direct the user to incomplete or incorrect information.

**Web Catalogs or “Punch out” catalogs**

- These are online shopping catalogs that when selected, take the user into the supplier’s website and online catalog. Two examples are VWR and Fisher.

- All browsing, shopping, real-time inventory lookup and pricing are done from the supplier’s website and their catalog.
• When finished shopping and putting items into a shipping cart, all information is automatically transferred back to SunRISE for requisitioning, approving, and creating a purchase order.
Hosted Catalogs

- In cases where suppliers do not have their own Web page or online catalog, the University may work with the supplier to list their products and prices as a Hosted Catalog.

- Hosted Catalogs will be listed under each commodity group. Click browse by supplier then choose hosted catalog suppliers from the “show types” field. A list of the hosted suppliers will appear.

User Profile your default user information. Accounting code and shipping default for all requisitions. Information can be changed at any time in the User Profile screen.

Requisition Header information associated with an entire requisition. Accounting code and shipping information for individual requisitions. Information can be changed at the time a requisition is created. Information may be changed before or after line items are added to the requisition.

Line Item information associated with a single item within a requisition. Accounting code per line item within a requisition. Information can be changed at the time a requisition is created. Information must be entered AFTER items are added to the requisition.

Funding Approval Determined by Advantage Account Number chosen
**Dollar Approvals**  All items in SunRISE are under contract or pricing agreement. Any approvals required are established in your User Profile.

**Property Control** Each requisition containing Capital Property codes is forwarded to Property Control for coding purposes.
CONGRATULATIONS!

You are now ready to use

SunRISE HigherMarkets Module for ordering Supplies

SunRISE Helpline:  727-RISE (7473)

sunrise@asu.edu

SunRISE Contacts

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Bettye Williams 5-9161 bettye.williams@asu.edu