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Blackbaud Web Purchasing

Training Session

Agenda

- **What is Blackbaud Web Purchasing?**
- **How to login to Blackbaud Web Purchasing**
- **Create a purchase requisition by adding a new product**
- **Create a purchase requisition using an existing product**
- **Add new products**

What is Blackbaud Web Purchasing

- **Web based purchasing program that is fully integrated with the Business Office operating system**
 - **More timely/efficient recognition of expenses incurred through the procurement process**
 - **More accurate budget reports**
 - **Streamlined approval process**

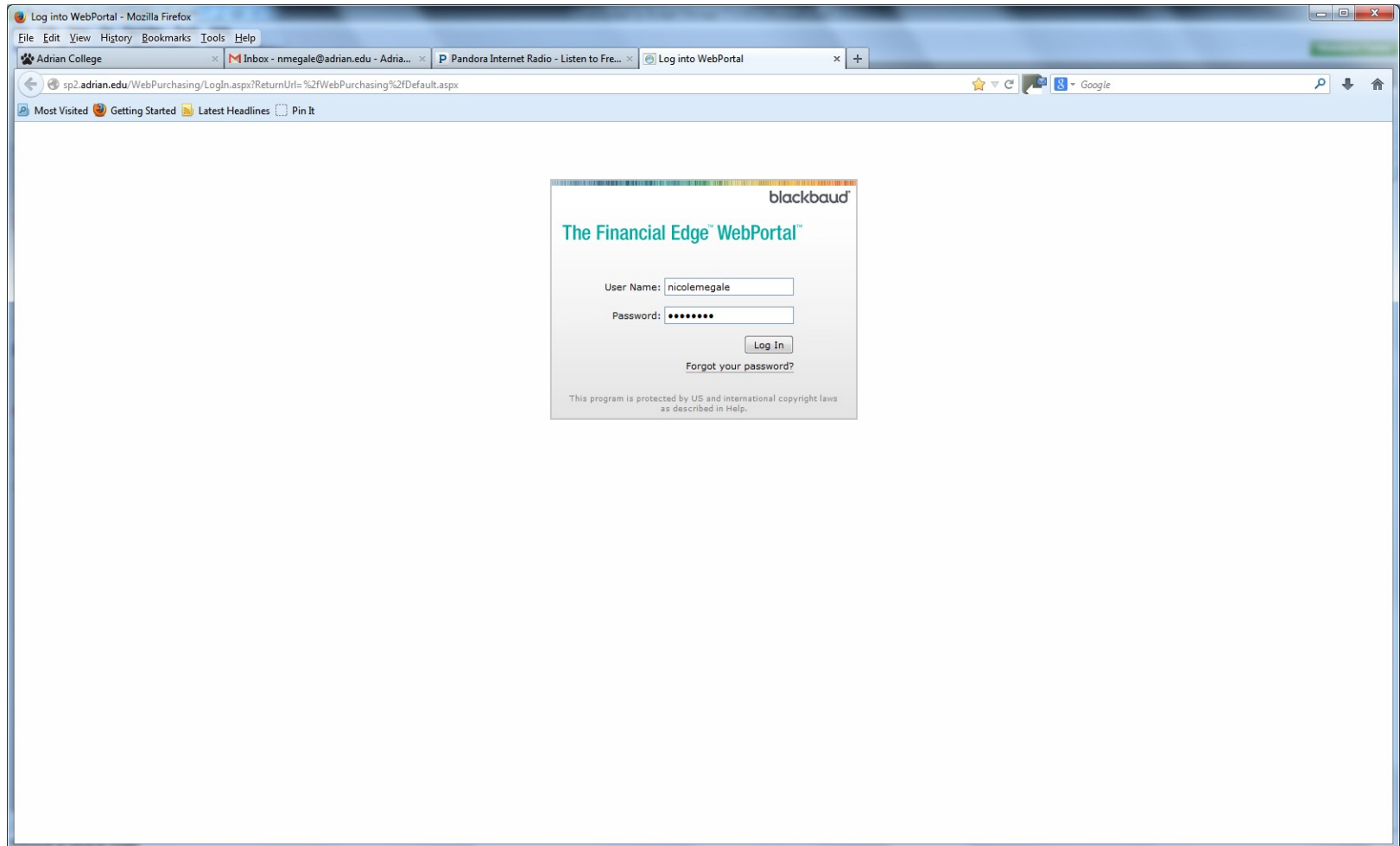
Log In to the Blackbaud System

Go to:

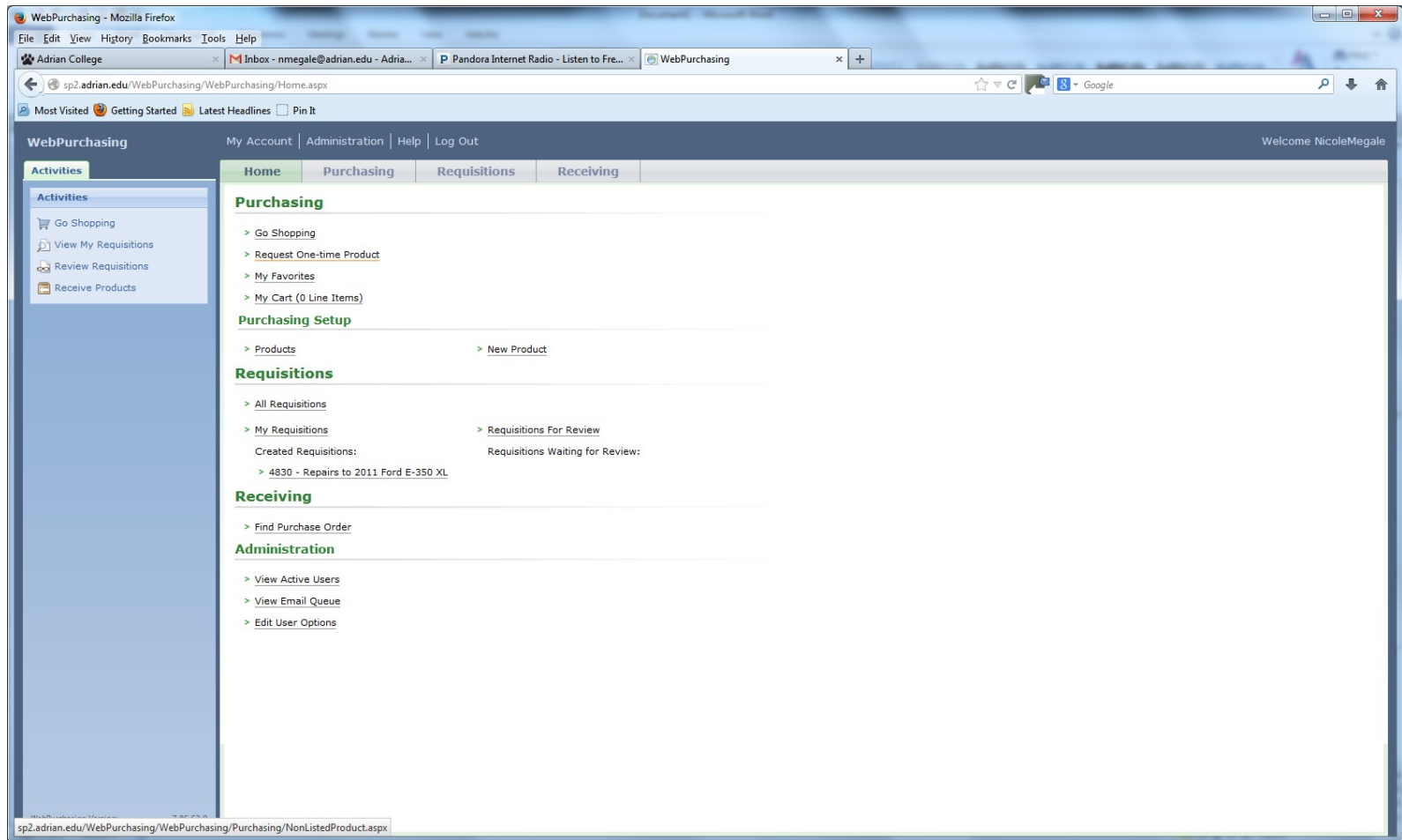
**[http://sp2.adrian.edu/WebPurchasing/LogIn.aspx?
ReturnUrl=%2fWebPurchasing%2fDefault.aspx](http://sp2.adrian.edu/WebPurchasing/LogIn.aspx?ReturnUrl=%2fWebPurchasing%2fDefault.aspx)**

- Please note that it is important to type the EXACT address above.
 - You will want to save this address as a favorite.
-
- **Username and password will be provided by Nicole**

Log In Screen

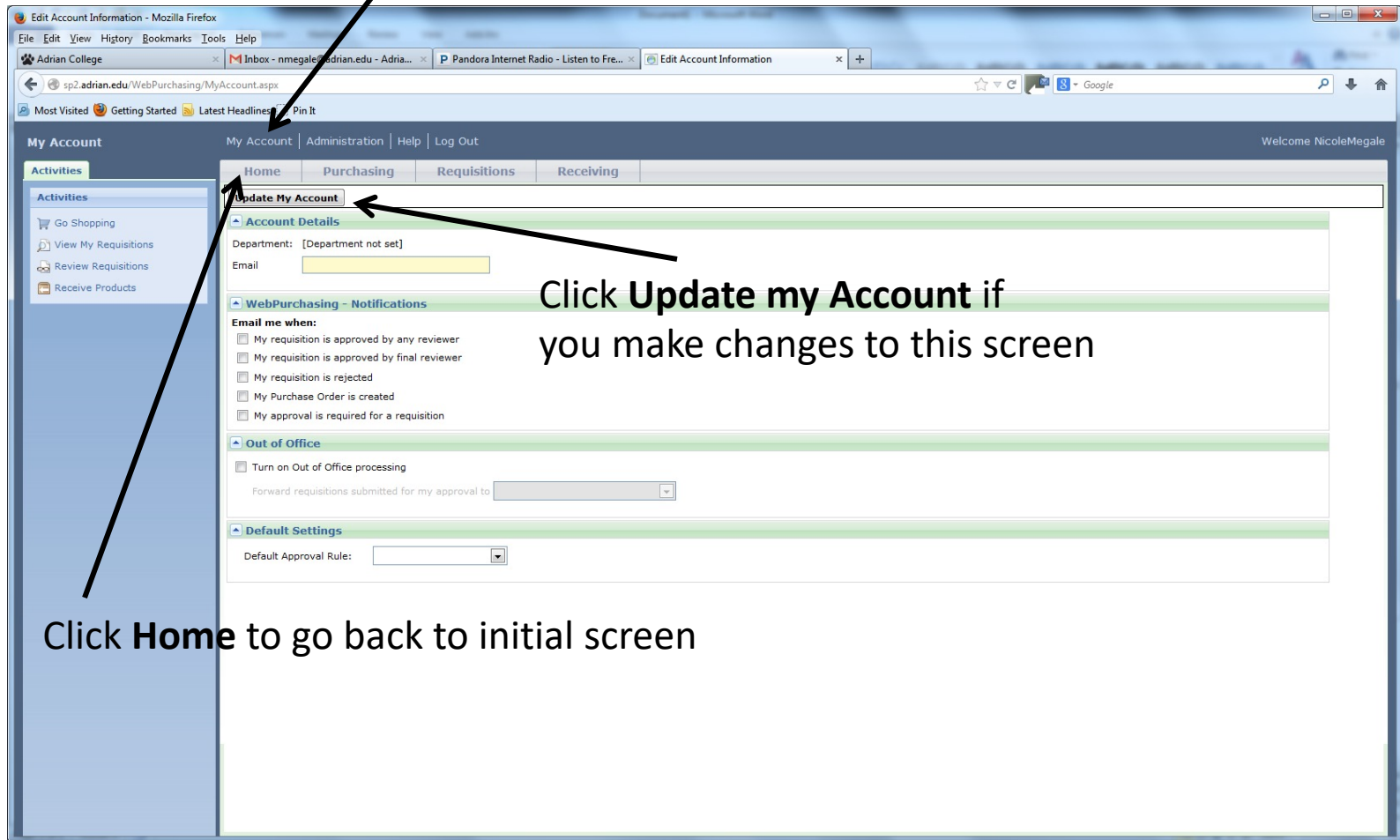


Initial Screen upon Successful Login



To See your Account Settings

Click on **My Account**



Click **Update my Account** if
you make changes to this screen

Click **Home** to go back to initial screen

Options for creating a purchase requisition

- **add a one time product purchase**
or
- **add a product that you will be purchasing frequently**
or
- **choose a product that is already in the list**



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**Process to create a purchase requisition by adding a
one time product purchase**

Process to create a purchase requisition by adding a one time product purchase

The screenshot displays the WebPurchasing application interface within a Mozilla Firefox browser window. The browser's address bar shows the URL `sp2.adrian.edu/WebPurchasing/WebPurchasing/Home.aspx`. The application's header includes navigation links for 'My Account', 'Administration', 'Help', and 'Log Out', along with a welcome message 'Welcome NicoleMegale'. The main content area is organized into several sections: 'Purchasing', 'Purchasing Setup', 'Requisitions', 'Receiving', and 'Administration'. The 'Purchasing' section is currently active, displaying a list of links: 'Go Shopping', 'Request One-time Product', 'My Favorites', and 'My Cart (0 Line Items)'. A black arrow points from a text box to the 'Request One-time Product' link. The 'Requisitions' section shows links for 'All Requisitions', 'My Requisitions', and 'Requisitions For Review'. The 'Receiving' section has a link for 'Find Purchase Order'. The 'Administration' section includes links for 'View Active Users', 'View Email Queue', and 'Edit User Options'. The browser's status bar at the bottom shows the URL `sp2.adrian.edu/WebPurchasing/WebPurchasing/Purchasing/NonListedProduct.aspx`.

Click on Request One-time Product

Add A Product Description, Quantity, Unit of Measure and Unit Price

Request One-time Product - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Adrian College Inbox - nmegale@adrian.edu - Adria... Pandora Internet Radio - Listen to Fre... Request One-time Product

sp2.adrian.edu/WebPurchasing/WebPurchasing/NonListedProduct.aspx

Most Visited Getting Started Latest Headlines Pin It

Request One-time Product My Account Administration Help Log Out Welcome NicoleMegale

Activities My Cart

Activities

- View My Cart (0 Line Items)
- View My Favorites
- View Product List
- Add New Product

Home Purchasing Requisitions Receiving

Add to Cart

Select a Vendor... OFFICEVILLE

Can't Find a Vendor?

Enter one here

Vendor Name Contact Name

Phone Number Email Address

Website

Address

Product Description 12345 - Ink Pens - Blue Med.

By Quantity

Quantity 1.0000 Unit of Measure Box

Unit Price \$10.000

Flat Amount

To

Notes

This is a test!!

Remaining: 484

Do not use the Flat Amount option. Req. cannot be processed with this option.

There is no place for Product ID/Vendor Part # Use the Product Description Field Put Product ID first, then Product Description

Click in *Select a Vendor*, Click the Binoculars icon
or
type in the Vendor Information

The screenshot shows a web browser window with the URL `sp2.adrian.edu/WebPurchasing/WebPurchasing/Purchasing/NonListedProduct.aspx`. The page title is "Request One-time Product - Mozilla Firefox". The browser's address bar shows the URL. The page has a navigation bar with "Request One-time Product", "My Account", "Administration", "Help", and "Log Out". A sidebar on the left contains "Activities" and "My Cart". The main content area has tabs for "Home", "Purchasing", "Requisitions", and "Receiving". The "Purchasing" tab is active, showing a "Select a Vendor..." section with a binoculars icon. Below this is a "Can't Find a Vendor?" section with a "Find a Vendor..." modal window. The modal has fields for "Vendor Name" (containing "office"), "City", "State" (a dropdown menu), and "Vendor ID". There are "Search" and "Clear" buttons. Below the search fields is a table of search results.

Vendor Name	Vendor ID	City	State/Province
CLASSIC OFFICE PRODUCTS	18956		
FEDEX OFFICE AND PRINT SERVICES INC	19511	DALLAS	Texas
FINDLAY HIGH SCHOOL GUIDANCE OFFICE	10179	FINDLAY	Ohio
KCACTF, EDUCATION OFFICE	12639	ARLINGTON	Virginia
NACADA EXECUTIVE OFFICE, KANSAS STATE UNIVERSITY	17484	MANHATTAN	Kansas
OFFICE DEPOT	18853		
OFFICE FURNITURE WHOLESAL	11614	SYLVANIA	Ohio
OFFICE SOLUTIONS INC	12740	KALAMAZOO	Michigan
OFFICE WORLD INC.	19354	EUGENE	Oregon

Type in any of the search criteria (here the user typed "office" in the Vendor name field), then click Search. You can use * as a wildcard to search OR

You can type in a vendor name other information using the text boxes. If you create a new vendor, put the **remit to** address in the address box

Once this is all filled in, click **Add to Cart**

Request One-time Product - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Adrian College | Inbox - nmegale@adrian.edu - Adria... | Pandora Internet Radio - Listen to Fre... | Request One-time Product

sp2.adrian.edu/WebPurchasing/WebPurchasing/Purchasing/NonListedProduct.aspx

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Request One-time Product My Account Administration Help Log Out Welcome NicoleMegale

Activities My Cart

Activities

- View My Cart (1 Line Item)
- View My Favorites
- View Product List
- Add New Product

Home Purchasing Requisitions Receiving

Add to Cart One-time product has been added to the Cart.

Select a Vendor...

Can't Find a Vendor?

Enter one here

Vendor Name Contact Name

Phone Number Email Address

Website

Address

Product Description

By Quantity

Quantity Unit of Measure

Unit Price

Flat Amount

Total Price

Notes

Then click **View My Cart** if you done adding products

At this point, you can:

My Cart - Mozilla Firefox

File Edit View History Bookmarks Tools Help

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sp2.adrian.edu/WebPurchasing/WebPurchasing/Purchasing/Cart.aspx

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My Cart

My Account Administration Help Log Out

Welcome NicoleMegale

Activities

- Continue Shopping
- Add New Product
- Request One-time Product
- Create Requisition

Home Purchasing Requisitions Receiving

Create Requisition Update Cart Total: \$10.00 Empty Cart

Remove	Product Description	Quantity	Unit Price	Extended Price
☐	12345 - Ink Pens - Blue Med.	1.0000	\$10.000	\$10.00

Unit: Box

To add another item to this request:
Request One-time Product
Or
Add New Product

Once you have added all products for this request, click **Create Requisition**

Click Create Requisition and review, then click Submit Requisition

The screenshot shows the 'Create Requisition' page in a Mozilla Firefox browser. The page has a navigation bar with 'Home', 'Purchasing', 'Requisitions', and 'Receiving'. The 'Requisitions' tab is active. On the left, there's an 'Activities' sidebar with 'Return To Cart', 'Save Requisition', and 'Submit Requisition'. The main content area shows a requisition form with fields for 'Created By' (NicoleMegale), 'Status' (Editing), 'Approval Rule' (Self-Approve), and 'Description'. A 'Save' button is highlighted with an arrow pointing to it from a callout box. Below the form is a table with one line item: '12345 - Ink Pens - Blue Med.' with a quantity of 1.000, unit cost of \$10.00, and extended price of \$10.00. The status is 'Pending'. An 'Edit' button is next to the line item, with an arrow pointing to it from another callout box. At the bottom, there's a 'History of Changes' section showing 'There are no changes on this Requisition.'

Callout 1: This description field is a reference name of the PO for the creator – you should fill it in

Callout 2: Click **Edit** to distribute the expense to the appropriate budget account(s)

Callout 3: You can **Save** the requisition without Submitting if you want to finish it later

Screen to distribute the Expense to the Appropriate Account(s)

1. Click Add

2. Click the binoculars icon to see a list of accounts

3. Option: Click to add a Project Code

Click here to copy information so you don't have to enter it for each item in your cart

② Click Save When you are done

③ Then Return to Requisition to Continue with the next item

① Enter the Amount of that purchase to go to that account – click Distribute Evenly to put it all on that account or split evenly between accounts

You can also click Check Budget, then **Actual**, to see what has been used of your budget

Add additional instructions/product info here.

Copy Line Item Info

Item Status: Pending

Return to Requisition Save

Internal Notes

This is a test!!

Vendor Information

Search for a Vendor

OFFICEVILLE

Suggest Another Vendor

Vendor Name Contact Name

Phone Number Email Address

Website

Address

Purchase Order Line Item Information (optional)

Date Required Department

Ship via Deliver to

Ship to Freight on board

Buyer

Distribution

Detail View Add Distribute Evenly Check Budget Load Default Distribution

Amount: \$10.00 GL Account: 01-6110-6210 Office Supplies - Business Office

Add Amount Project

\$10.00 Unrestricted Net Assets

History of Changes

There are no changes on this Line Item

When you are finished adding items, click Submit Requisition to send it to Purchasing

Create Requisition - Mozilla Firefox

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sp2.adrian.edu/WebPurchasing/WebPurchasing/Requisitions/CreateRequisition.aspx

Most Visited Getting Started Latest Headlines Pin It

Create Requisition My Account Administration Help Log Out Welcome NicoleMegale

Activities

- Return To Cart
- Save Requisition
- Submit Requisition

Submit Requisition Save Total: \$10.00 Return To Cart

Created By: NicoleMegale Approval Rule: Self-Approve Show Details

Status: Editing

Description: Ink Pens for Business Office

Add Attachments 0 Attachments

Line #	Line Item Description	Quantity	Unit Cost	Extended Price	Status	
1	12345 - Ink Pens - Blue Med.	1,000	\$10.00	\$10.00	Pending	Edit

Vendor: OFFICEVILLE

Attributes

Attribute Type	Description	Short Description	Date	Required	Comments
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History of Changes

There are no changes on this Requisition.

Approval Rule:
Allows you to change
which "track" the PO will
follow for approval.
The default is set in My
Account



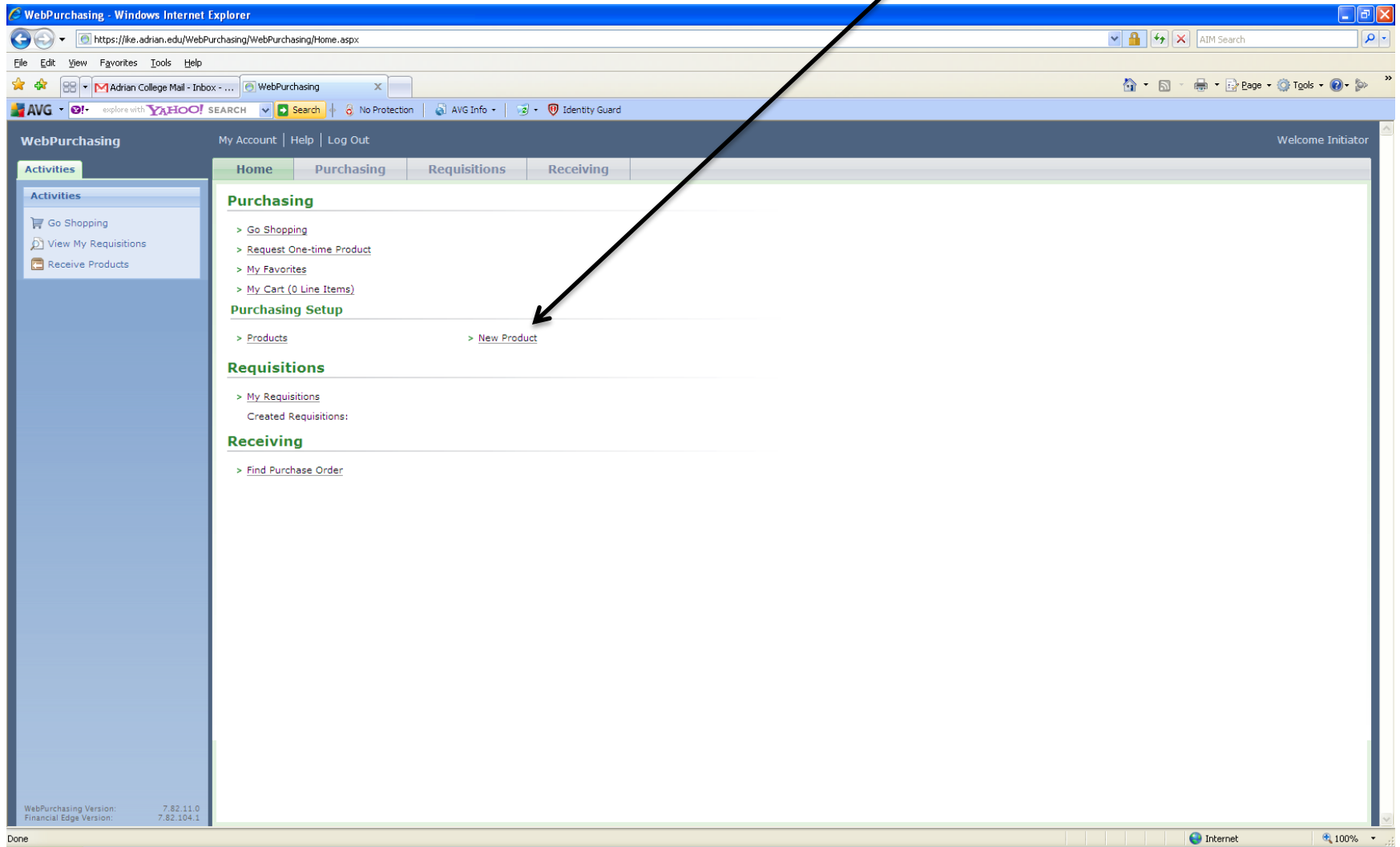
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Add a product that you will purchase frequently to the “Go Shopping List”

You would only use this option when you have a product that you will order again and again. Otherwise, you will use the “One-Time Purchase” option described earlier.

From the Home screen, click on
New Product



Fill in Product Information

The screenshot shows a web browser window titled 'New Product - Mozilla Firefox' with the URL 'sp2.adrian.edu/WebPurchasing/WebPurchasing/Setup/AddProduct.aspx'. The page has a navigation bar with 'Home', 'Purchasing', 'Requisitions', and 'Receiving' tabs. The 'Purchasing' tab is active, and the 'General Product Information' section is expanded. The form contains the following fields:

- Product ID:
- Description:
- Vendor Name:
- Unit of Measure:
- Quantity Decimals:
- Notes:
- Active: ☒
- Vendor Part #:
- Standard Unit Cost:
- Receiving Location:

Below the 'General Product Information' section are sections for 'Categories Associated' and 'Pricing Schedules'. The 'Categories Associated' section has dropdowns for 'Categories' and 'Subcategories', and 'Assign' and 'Remove' buttons. The 'Pricing Schedules' section has a 'New' button and a table with columns 'Effective Date', 'Description', and 'Unit Price'.

Annotations on the screenshot include:

- A callout box pointing to the 'Save' button: "Click Save when complete – you can edit or delete the product later".
- A callout box pointing to the 'Product ID' and 'Description' fields: "Fill in the Product ID and the Vendor Part # with the same info".
- A callout box pointing to the 'Description' field: "Also, the Description is required!".
- A black callout box at the bottom: "Please Note: This process does not add the product to your cart, only to the list. If you want it in your cart, you need to **Go Shopping** after you add it."

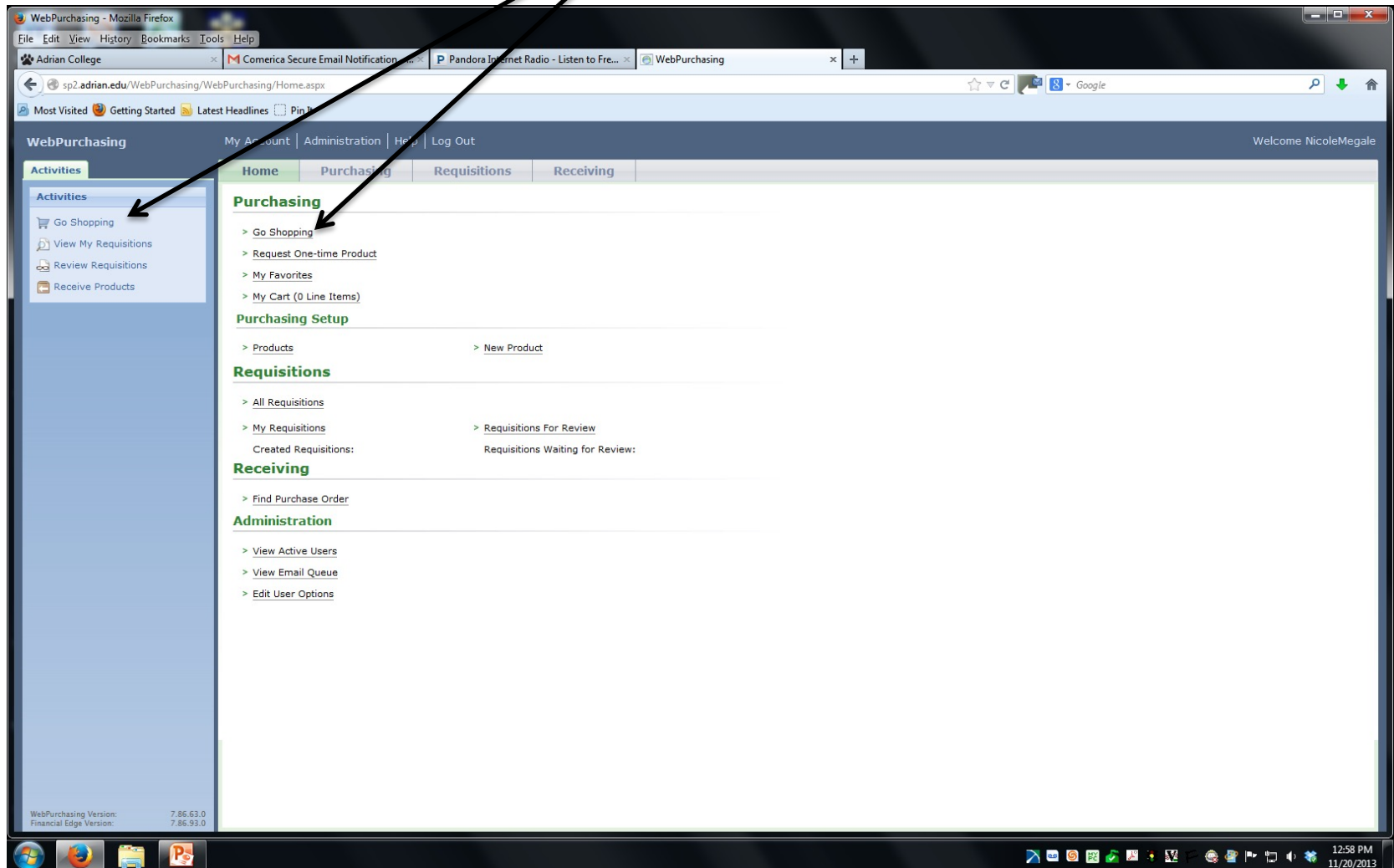


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Process to select an existing product from the “Go Shopping” list

Click Go Shopping



Search for a product (based on the description that you entered when adding it to the product list), enter the quantity needed, then **Add to Cart**

Product List - Windows Internet Explorer

https://ike.adrian.edu/WebPurchasing/WebPurchasing/Purchasing/Products.aspx

File Edit View Favorites Tools Help

Adrian College Mail - Inbox - ... Product List X

AVG explore with YAHOO! SEARCH No Protection AVG Info Identity Guard

Product List My Account | Help | Log Out Welcome Initiator

Activities My Cart

Activities

- View My Cart (0 Line Items)
- View My Favorites
- Add New Product
- Request One-time Product

Search the Product List

Product Description

Vendor

Vendor Part No

Product ID

Category

All Categories

Subcategory

All Subcategories

Sort by

Product Description

Search Clear

Home Purchasing Requisitions Receiving

100 Drury Left grip One Piece (100 Drury Lgrip 1P)

- Vendor: EASTON BELL SPORTS INC (16792)
- Vendor Part No:

Price: \$101.600

Unit: Each

Qty: 1

Add to Cart

Add to Favorites

100 Drury left one piece (100 Drury left 1P)

- Vendor: EASTON BELL SPORTS INC (16792)
- Vendor Part No:

Price: \$97.000

Unit: Each

Qty: 1

Add to Cart

Add to Favorites

100 Drury Right One Piece (100 Drury R One P)

- Vendor: EASTON BELL SPORTS INC (16792)
- Vendor Part No:

Price: \$97.000

Unit: Each

Qty: 1

Add to Cart

Add to Favorites

100 Getzlaf - Left Grip One Piece (100 Getzlaf LH G 1P)

- Vendor: EASTON BELL SPORTS INC (16792)
- Vendor Part No:

Price: \$101.600

Unit: Each

Qty: 1

Add to Cart

Add to Favorites

100 Getzlaf Left Grip One Piece (100 Getzlaf LHG 1P)

- Vendor: EASTON BELL SPORTS INC (16792)
- Vendor Part No:

Price: \$101.600

Unit: Each

Qty: 1

Add to Cart

Add to Favorites

100 Getzlaf left one piece (100 Getzlaf left 1P)

- Vendor: EASTON BELL SPORTS INC (16792)
- Vendor Part No:

Price: \$97.000

Unit: Each

Qty: 1

Add to Cart

Add to Favorites

100 Getzlaf Right Grip One piece (100 Getzlaf RH G 1P)

- Vendor: EASTON BELL SPORTS INC (16792)
- Vendor Part No:

Price: \$101.600

Unit: Each

Qty: 1

Add to Cart

Add to Favorites

Show 10 items per page

Page 1 of 6 (51 records)

Internet 100%

You will see the cart items number change as you add items to cart

The screenshot shows a web application titled "Product List" running in a Windows Internet Explorer browser. The browser's address bar shows the URL: <https://ike.adrian.edu/WebPurchasing/WebPurchasing/Purchasing/Products.aspx>. The application has a navigation bar with tabs: "Activities", "My Cart", "Home", "Purchasing", "Requisitions", and "Receiving". The "Activities" tab is currently selected. On the left side, under "Activities", there is a list of links: "View My Cart (1 Line Item)", "View My Favorites", "Add New Product", and "Request One-time Product". An arrow points from the "View My Cart" link to a callout box. The main content area displays a list of products, each with a description, vendor information, and a price. The products listed are:

- 100 Drury Left grip One Piece (100 Drury Lgrip 1P) - Vendor: EASTON BELL SPORTS INC (16792) - Price: \$101.600
- 100 Drury left one piece (100 Drury left 1P) - Vendor: EASTON BELL SPORTS INC (16792) - Price: \$97.000
- 100 Drury Right One Piece (100 Drury R One P) - Vendor: EASTON BELL SPORTS INC (16792) - Price: \$97.000
- 100 Getzlaf - Left Grip One Piece (100 Getzlaf LH G 1P) - Vendor: EASTON BELL SPORTS INC (16792) - Price: \$101.600
- 100 Getzlaf Left Grip One Piece (100 Getzlaf LHG 1P) - Vendor: EASTON BELL SPORTS INC (16792) - Price: \$101.600
- 100 Getzlaf left one piece (100 Getzlaf left 1P) - Vendor: EASTON BELL SPORTS INC (16792) - Price: \$97.000
- 100 Getzlaf Right Grip One piece (100 Getzlaf RH G 1P) - Vendor: EASTON BELL SPORTS INC (16792) - Price: \$101.600

Each product entry includes a quantity input field (set to 1) and buttons for "Add to Cart" and "Add to Favorites". A callout box with a grey background and black text is positioned over the product list, containing the following text:

From here you can:

- Continue to Shop
- View My Cart
- Add a New Product
- Request a One-time Product

Below this, another callout box with a white background and black text contains the following text:

Once you have added all of the items for this requisition, click on **View My Cart** to create the requisition.

The bottom of the page shows a pagination bar with "Page 1 of 6 (51 records)" and a "Show 10 items per page" option.

You will see this screen when you select **View my Cart**

My Cart - Windows Internet Explorer

https://ike.adrian.edu/WebPurchasing/WebPurchasing/Purchasing/Cart.aspx

File Edit View Favorites Tools Help

AVG explore with YAHOO! SEARCH No Protection AVG Info Identity Guard

My Cart My Account | Help | Log Out Welcome Initiator

Activities

Continue Shopping
Add New Product
Request One-time Product
Create Requisition

Home Purchasing Requisitions Receiving

Create Requisition Update Cart Total: \$101.60 Empty Cart

Remove	Product Description	Quantity	Unit Price	Extended Price
☐	100 Drury Left grip One Piece	1	\$101.600	\$101.60

Unit:

When finished Shopping and Adding Products:
Create Requisition
Then, follow the directions from slide #15 for Distribution to Accounts then Submit Requisition