

**acolad.**

**Acolad Portal**

# **eProcurement User Guide**

Version 1

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# Overview

## Acolad Portal Integration with eProcurement Systems

### Introduction

The Acolad Portal seamlessly integrates with eProcurement systems to streamline the client's procurement, oversight, and budgetary approval of language services. An eProcurement integration with the Acolad Portal offers several key benefits:

- **Centralized Procurement:** Consolidates the process of obtaining purchase orders (POs) within the eProcurement system, providing a single point of control for purchases.
- **Cost Control:** Facilitates budget tracking and adherence to procurement policies.
- **Simplified Ordering:** Streamlines the ordering process, reducing manual effort and minimizing errors.
- **Enhanced Security:** Ensures data protection through secure authentication methods, including Single Sign-On (SSO) and automatic account creation.

### Setup and Implementation

Integration with an eProcurement system involves configuring the Acolad Portal to meet specific client requirements. This process requires a detailed assessment and mutual agreement on all prerequisites before implementation begins. To proceed, the following information and documentation may be requested:

- **PunchOut Documentation:** The client must provide detailed documentation for their chosen eProcurement system, such as Ariba or Coupa.
- **Access to the eProcurement Testing Environment:** Client must provide access to a test environment to support the implementation effort and facilitate thorough testing prior to deployment into production.
- **Technical Contact Person:** Designate an internal technical contact to answer questions and provide support with eProcurement-related topics.
- **SSO Setup Documentation (optional but recommended):** Provide required metadata and relevant documentation for Single Sign-On (SSO) configuration.

# eProcurement Implementation

## Seamless Integrations Between Portal and Procurement

### How It Works

The Acolad Portal supports a variety of eProcurement scenarios, enabling a seamless integration process tailored to the client needs. Below are the key scenarios and workflows involved:

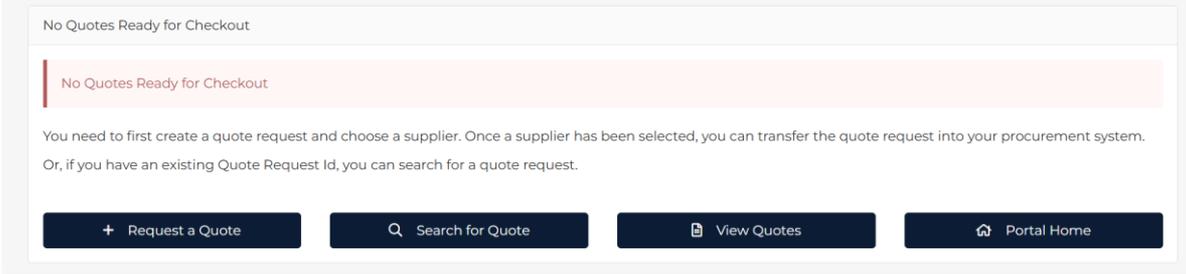
### Common eProcurement Scenarios

Acolad Portal can be configured to support one or more of the following purchasing scenarios:

1. The user requests a quote from Acolad for their language services project. Acolad provides the quote, which the requestor reviews and accepts. The quote is then transferred to their eProcurement system to obtain a purchase order (PO).
2. The quote requester already has a PO but requires a quote for informational or budgetary purposes. This is a common scenario when using a blanket PO over multiple projects.
3. The quote requester requires assistance from a "PO Preparer/Delegate" to obtain a PO in the eProcurement system.

### Getting Started

Users typically start by logging into the client's eProcurement system and selecting an approved supplier tile to access the Acolad Portal. After completing any required account activation steps, users are presented with a list of quotes ready for transfer into the eProcurement system.



If a user does not have any quotes ready for transfer, as in the case of a new user, they are presented with the option to request a quote or search for an existing quote.

## What Makes a Quote Ready for Transfer?

For a quote to be ready for transfer into eProcurement, it must meet the following criteria.

- A quote request must first be created in the Acolad Portal.
- The quote request must receive a quote from Acolad. This quote will provide the cost and project turnaround of the requested language services.
- The requester must accept the quote from Acolad.

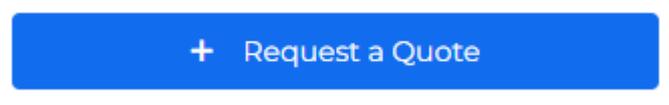
Once the requester and Acolad have agreed upon the cost and project turnaround by accepting the Acolad quote, the quote becomes eligible for transfer into the client's eProcurement system.

## Step by Step Instructions

If users do not have quotes ready for transfer, they can create a new quote by clicking the **Request a Quote** button.

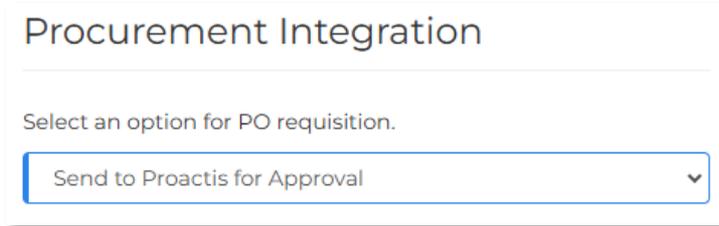
### Request a Quote

1. Click the **Request a Quote** button.



2. Fill in the required details (languages, services, custom fields, instructions, etc.) in the quote request form and upload the files for their project.

3. Within the **Procurement Integration** section, select the option to send the quote to your eProcurement system (options may vary based on implementation).



Procurement Integration

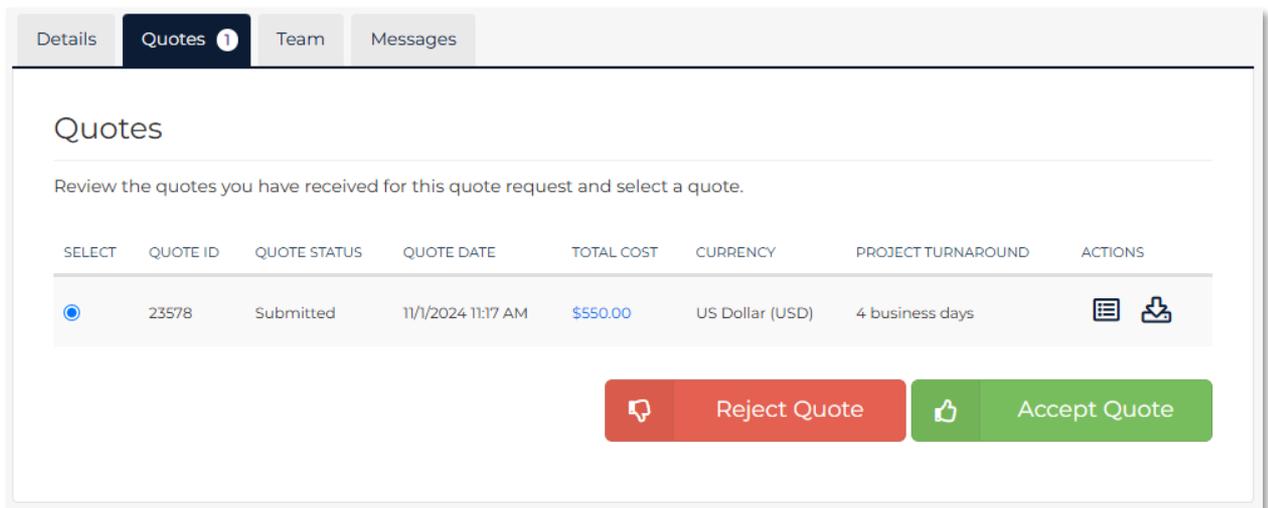
Select an option for PO requisition.

Send to Proactis for Approval

4. Submit the request to notify the Acolad team and initiate the preparation of a project quote.

## Receive a Quote

1. Once the Acolad team prepares and uploads the quote, the requester receives an email notification.
2. Clicking the link in the notification enables the requestor to view the quote within the Acolad Portal.
3. In the Quotes tab, the requester can review or download the quote, detailing the total cost and project turnaround for their project.



Details Quotes 1 Team Messages

### Quotes

Review the quotes you have received for this quote request and select a quote.

SELECT	QUOTE ID	QUOTE STATUS	QUOTE DATE	TOTAL COST	CURRENCY	PROJECT TURNAROUND	ACTIONS
<input checked="" type="radio"/>	23578	Submitted	11/1/2024 11:17 AM	\$550.00	US Dollar (USD)	4 business days	 

 **Reject Quote**  **Accept Quote**

## Accept a Quote

1. If the requestor agrees with the total cost and project turnaround, they can accept the quote for their project.
2. Acolad will be notified of the quote acceptance.
3. At this point, the quote is now ready for transfer into the client's eProcurement system.

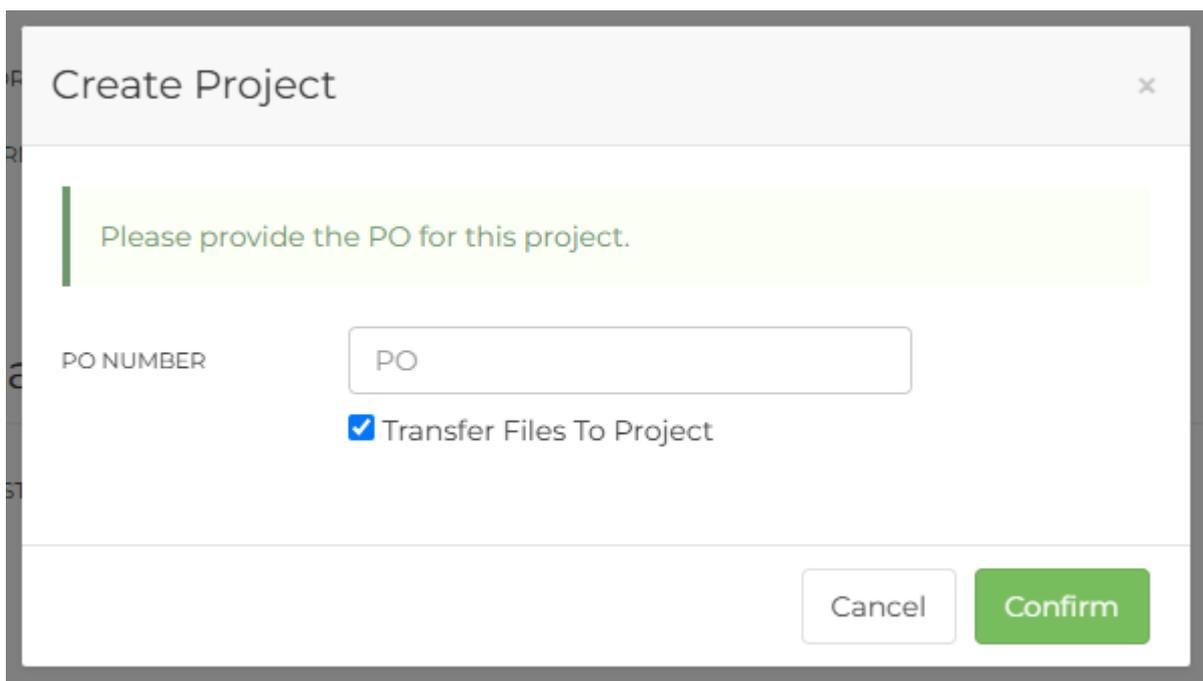
## PO Requisition

In most eProcurement integrations, a PO or order number issued by procurement is required to convert the quote into an actual project. Depending on your setup, one or more of the following options for obtaining a PO may be available after accepting a quote:

- **Complete Checkout in eProcurement System:** Users can complete the process by accessing their eProcurement system and following the provided instructions to transfer eligible quotes into their procurement shopping cart.
- **Request PO Assistance:** Users needing support with processing their quote through the eProcurement system can request assistance with a Purchase Order (PO) by entering the email address of the designated individual who will offer support.
- **I Already Have a PO:** Users with an existing Purchase Order (PO), such as a blanket PO, can skip the eProcurement process and proceed directly to project creation.

## Create a Project

1. After the quote has been successfully transferred and approved within the eProcurement system, the requestor will receive an email containing the PO number.
2. Log in to the Acolad Portal and navigate to the quotes module to locate the corresponding quote request.
3. Open the quote request details page and click the **Create Project** button.
4. Enter the issued PO number and click the **Confirm** button to begin the project. Acolad will be notified that the project has begun.



The screenshot shows a 'Create Project' dialog box. At the top, there is a title bar with the text 'Create Project' and a close button (X). Below the title bar, a green message box contains the text 'Please provide the PO for this project.' Underneath the message box, there is a label 'PO NUMBER' followed by a text input field containing the text 'PO'. Below the input field, there is a checked checkbox with the label 'Transfer Files To Project'. At the bottom right of the dialog, there are two buttons: 'Cancel' and 'Confirm'.

5. You can now track and manage your project in the Projects module.

# Supported eProcurement Systems

The Acolad Portal supports the following eProcurement protocols:

- **cXML PunchOut:** Examples include Ariba and Coupa.
- **OCI PunchOut:** Examples include Proactis.