HELPFUL TIPS FOR DIRECT CONNECT REQUISITIONS FOR GRAINGER

The following tips have been developed to help UTHSCSA users become quickly familiar with creating a Direct Connect requisition for Grainger in PeopleSoft Financials.

<table>
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<th>About Direct Connect</th>
<th>Direct Connect is more than just a requisition type in PeopleSoft Financials. It also describes technology that allows us to directly connect to a vendor’s website. Vendors with whom we have established a Direct Connect relationship are typically preferred suppliers of the U T System Supply Chain Alliance or have another type of agreement with the Health Science Center. This means that the pricing listed on the Direct Connect vendor’s website has been established through the appropriate procurement method and requires no additional competition or justification.</th>
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<tbody>
<tr>
<td>About the Vendor</td>
<td>Grainger is a supplier of facilities maintenance, repairs, and operations products. Their extensive online catalog gives customers access to more than 700,000 products.</td>
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</table>
| How to Create a Direct Connect Requisition for this Vendor | 1. Create a Direct Connect requisition.  
2. You can select the vendor by clicking the for the Vendor ID field. Select Vendor ID 00000271985.  
3. Complete the rest of the Requisition Defaults page.  
4. Either click the button, or click on 2. Add Items and Services.  
5. On the Add Items and Services page, click on GRAINGER to “punch out” to the vendor’s website. |
Overview of the Vendor’s Website

Once you punch out of PeopleSoft, the first page you will see is Grainger’s **Quick Item Entry** page. Here you can enter catalog numbers if you know them; however, most users will want to shop for catalog items using one of the many different ways Grainger has provided to search their catalog.

You can return to the Quick Item Entry page at any time by clicking on the Grainger logo.
### Searching the Vendor’s Catalog

Grainger lets you search their extensive catalog of products and services in a variety of ways. Here are some of the most popular methods.

1. **Use the Search Box.** Enter a keyword or catalog part number.

2. **Select a Product Category.**

3. **Click the Catalog button.** This method allows you to search using the catalog’s product index.

![Diagram of Grainger's search interface](image)

Helpful Tips for Direct Connect Requisitions for Grainger
Shopping Cart and Checkout

- When you have completed ordering items, click on your shopping cart. Grainger refers to it as the Requisition Form.

- Click the **Continue** button at the bottom of the page.

- Click the **Submit Requisition** button to send your shopping cart contents to your PeopleSoft requisition.

**CLICK THE BRIGHT, RED CONTINUE BUTTON TO PROCEED TO CHECKOUT**

**Click this button to return to PeopleSoft**
• The contents of your shopping cart appears in your PeopleSoft requisition.

Confirming Your Order

Within minutes after your requisition has been approved, a scheduled process will source your requisition to a purchase order which is then automatically dispatched to the vendor. Typically, within a few hours, the vendor will send an order confirmation similar to the one shown below.

⚠️ If you do not receive an order confirmation, check your junk email folder and filtering rules/options.
### Problems You Might Encounter

- **Timeout errors** – After 60 minutes of inactivity on the vendor’s site, your browser session with Grainger can time out, causing you to lose items previously placed in your shopping cart.

### Questions You Might Have

- **Can I create a list of favorites?** Yes, any UTHSCSA user who can punch out to Grainger can create a list of favorites, which Grainger simultaneously refers to as a **Shared List** or **Personal List**. All UTHSCSA users are basically seen as a single punchout user, so any UTHSCSA user can view, use, edit, and delete a list that you create. List names can be up to 50 characters. As a practical matter, always prefix a list name with your UTHSCSA username. If you forget this step, Grainger allows you to easily rename a Shared List.

![Grainger Shared List](image)

- **Can I save my shopping cart and come back to it later?** No. Once you leave the Grainger website, your shopping cart is lost. So, it is best to check out your shopping cart and send the items to your PeopleSoft requisition. Be sure to save your requisition. You can then retrieve your PeopleSoft requisition and punch out again to Grainger from the Add Items and Services page of the requisition. Any items added to your subsequent shopping cart will be appended to the items in your PeopleSoft requisition when you check out.

- **Are there any items that are restricted/blocked in the catalog?** Virtually the entire Grainger catalog is available. Should an item be restricted from purchase via direct connect, you still have the option of ordering the item on a “basic” requisition. A restricted item will display in the catalog, but the item cannot be added to your cart. There may be some state-imposed restrictions on the sale of some items in the catalog. To determine if an item in Grainger’s catalog cannot be sold in Texas, click the question mark button 🛒 (see illustration). A list of states that impose restrictions will be listed.
Getting Help

- Contact DCATS at 210-567-7777 (option 5).
- Contact the Purchasing Department at (210) 562-6200, or email purchadmin@uthscsa.edu.
- Consult the vendor’s online help.

⚠️ Some portions of the vendor’s online help topics do not apply to UTHSCSA punchout users. The vendor’s website supports both punchout users, as well as users from other organizations who must login to the vendor’s site. Some help topics include extra steps that do not apply to punchout users. Always ignore any portions of help topics that instruct you to log into (or out of) the vendor’s website, or to change passwords.