

E-Procurement System Tutorial

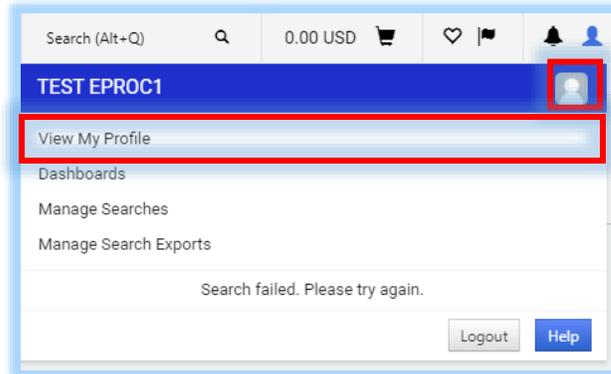
Verifying your Profile Information

Accessing E-Procurement

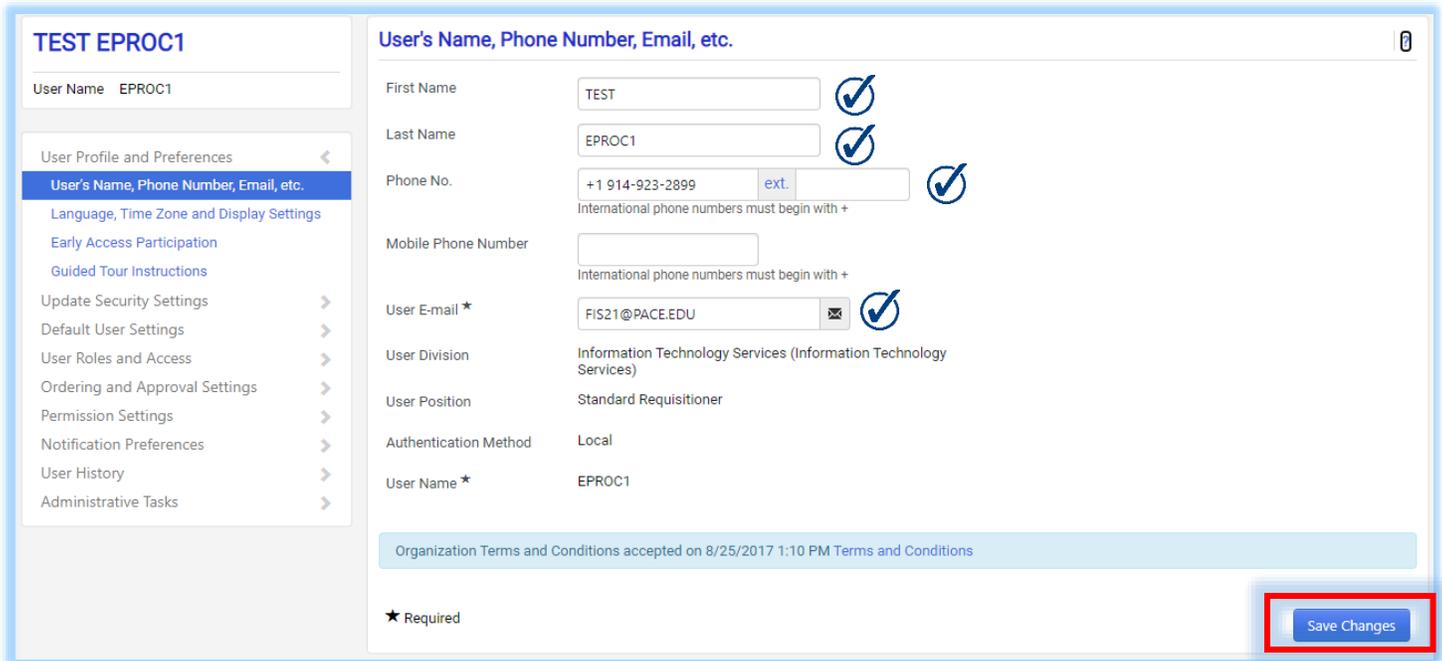
Log on to MyPace Portal, click the Staff tab and click E-Procurement.

Verifying User Profile – User Identification

Once logged in, Click the  icon → View My Profile (located in the upper right-hand corner of the screen.)

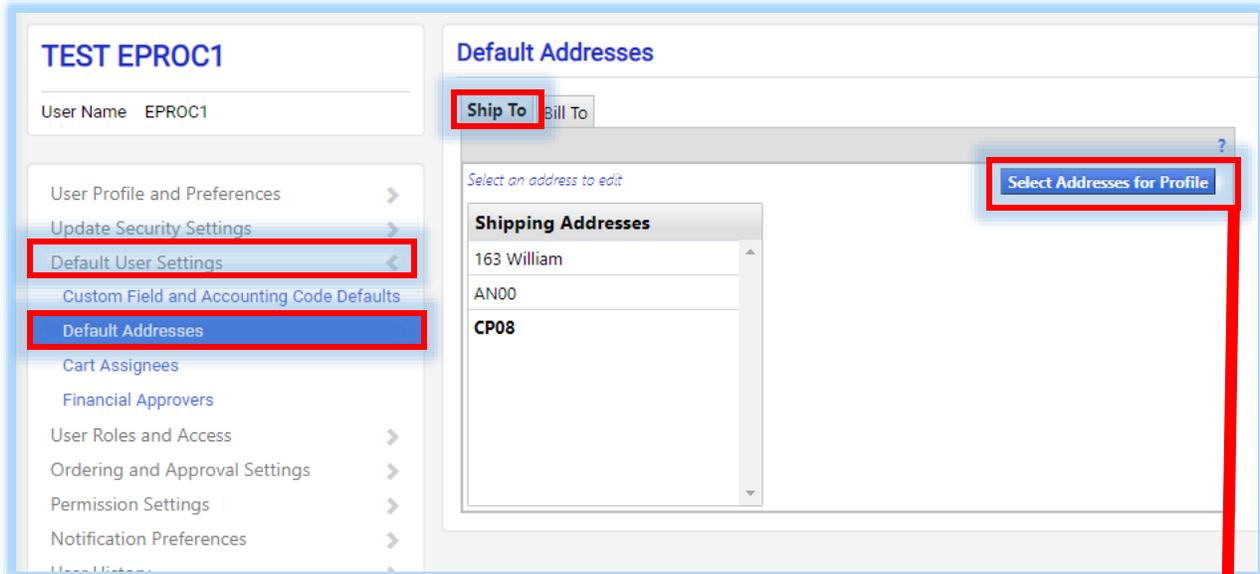


Verify that the information contained in the User's Name, Phone Number, Email, etc. section is correct. Make any necessary changes and click Save.

A screenshot of the MyPace Portal user profile page. The page is titled 'TEST EPROC1' and shows the user's profile information. The 'User's Name, Phone Number, Email, etc.' section is highlighted. The profile information includes: First Name: TEST (checked), Last Name: EPROC1 (checked), Phone No.: +1 914-923-2899 (checked), Mobile Phone Number: (empty), User E-mail: FIS21@PACE.EDU (checked), User Division: Information Technology Services (Information Technology Services), User Position: Standard Requisitioner, Authentication Method: Local, User Name: EPROC1. At the bottom right, there is a red box around the 'Save Changes' button. A blue bar at the bottom indicates 'Organization Terms and Conditions accepted on 8/25/2017 1:10 PM Terms and Conditions'. A legend at the bottom left indicates '★ Required'.

Verifying User Profile – Ship To Address

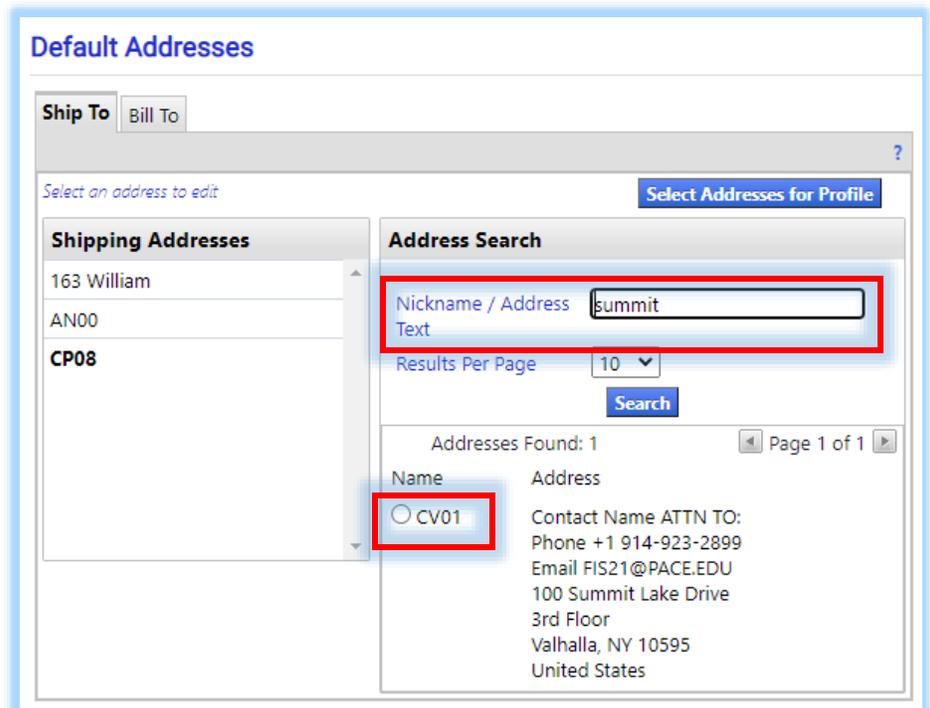
1. Click **Default User Settings**.
2. Click **Default Addresses**.
3. Click the **Ship To** tab



Click the **Ship To** tab to select the Ship To address.

Click the **Select Addresses for Profile** button, then enter keywords associated to that address in the **Nickname/Address Text** field and click on the **Search** button to search for that address.

Click the **radio button** to the left of the address you would like to add to your profile.



Default Addresses

Ship To | Bill To

Select an address to edit

Select Addresses for Profile | Delete Address

Shipping Addresses

- 163 William
- AN00
- CP08**

Edit Selected Address

Nickname: CN05

Default:

Current Default Address: CP08

ADDRESS

Attn: * ATTN TO: Test User

Room: * 1

Address 1: 156 William

Address 2: 156 William Street

Building: Building 156 WIL

City: New York

State/Province: NY

Postal Code: 10038

Country: United States

Save

- In the **Nickname** field, type the name to be given to this address. Otherwise, leave the code that populates.
 - Click the **Default** box if this is the address that is most frequently shipped to
-
- In the **Contact Name** field type the name of the person who the deliveries are sent to.
 - Enter the Room # if applicable.
 - Click Save to save changes

PLEASE NOTE: The user will see the Nickname appear to the left in the Shipping Addresses selection box.

To set the address as your **Default**, click on the nickname to the left and check the **Default** checkbox to the right. Then click **Save**.

Select an address to edit

Select Addresses for Profile | Delete Address

Shipping Addresses

- 163 William
- AN00
- CN05
- CP08**

Edit Selected Address

Nickname: 163 William

Default:

Current Default Address: CP08

ADDRESS

Attn: * ATTN TO:

Room: *

Address 1: 163 William

Address 2: 163 William Street

Building: Building 163 WIL

City: New York

State/Province: NY

Postal Code: 10038

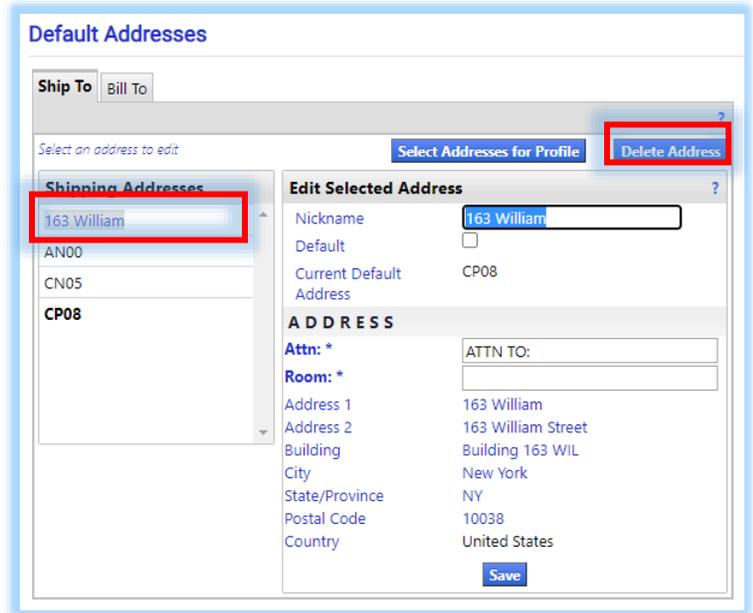
Country: United States

Save

If the user frequently processes orders for other individuals within their department, add additional addresses as required.

To add an additional **Shipping Address**, click **Select Addresses for Profile** and repeat previous steps. If this does not apply, continue to the next step.

If there is an address which needs to be deleted in the **Shipping Addresses**, select it from the left-hand side of the screen. Click **Delete Address**.

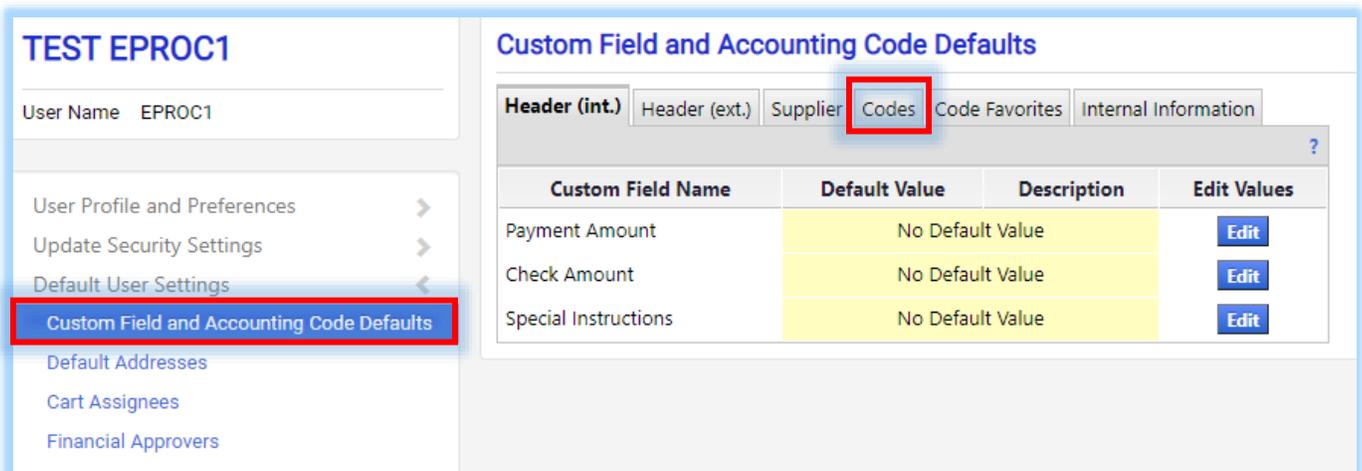


*****PLEASE NOTE:** The **Bill To** Address on the **Bill To** tab will always default to the Accounts Payable PO Box. It should NOT be updated. ***

Verifying User Profile – FOAPAL (Fund, Organization, Account, Program, Activity, Location) Values

This allows the user to verify that the accounting information contained in the E-Procurement System is correct.

1. Click the **Default User Settings** section
2. Click **Custom Field and Accounting Code Defaults** Section
3. Click the **Codes** tab



4. Then click on the **Edit** button in the **Index** row

Custom Field and Accounting Code Defaults

Header (int.) | Header (ext.) | Supplier | **Codes** | Code Favorites | Internal Information

Custom Field Name	Default Value	Description	Edit Values
Index	FA526	Purchasing & Contracts	Edit
Account	E19601	Supplies General Office	Edit
Commodity Code	615	Office Supplies, General	Edit
Chart	1	Pace University	Edit

5. Click **Create New Value**, enter the Index to be added in the **Value** field and click **Search**

Custom Field Name: Index, Default Value: FA526, Description: Purchasing & Contracts

Create New Value

Value	Description
FA040	Financial Information Systems (FIS)
FA526	Purchasing & Contracts

Search For Value

Field Name: Index

Value: [Empty]

Description: [Empty]

Results Per Page: 5

Search

6. Select the checkbox and click **Add Values** to add to profile

Results Per Page: 5, Values Found: 1, Page 1 of 1

Select	Value	Description
<input checked="" type="checkbox"/>	FA046	TEST DEMO

Add Values | **Back to Search**

- To set Index as **Default**, click on the Index from the left-and list and select the **Default** checkbox to the right. Then click **Save**

Edit Values [Close]

Create New Value

Value	Description
FA040	Financial Information Systems (FIS)
FA046	TEST DEMO
FA501	Sr VP for Finance &

* Custom Field Values marked

Edit Existing Value ?

Value: FA046

Description: TEST DEMO

Default:

Status: active

[Save] [Remove]

PLEASE NOTE: By defaulting a code you are noting this a code most frequently used. You can still edit the code at the Requisition step if charging to a different index.

- Click the **Codes** tab to return to the Custom Field and Accounting Code Defaults
- Click **Edit** to choose a default value for Account and Commodity Code (**PLEASE NOTE:** Chart should always be defaulted to "1-Pace University")

Custom Field Name	Default Value	Description	Edit Values
Account	No Default Value		[Edit]

Edit Values [Close]

Create New Value

Value	Description
E18201	Advertising Magazine
E18413	Print Promo Mailing Lists
E19001	Supplies Instructional and Lab
E19201	Supplies Computer Accessories

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these

Results Values Found Page 1 of 1 ?

Select Value Description

E19602 Supplies General Office

[Add Values] [Back to Search]

Custom Field Name	Default Value	Description	Edit Values
Commodity Code	615	Office Supplies, General	[Edit]

Edit Values [Close]

Create New Value

Value	Description
050	Art Equipment And Supplies
075	Automotive Shop Equipment And Supplies
095	Barber And Beauty Shop

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

Results Values Found Page 1 of 1 ?

Select Value Description

655 Photographic Equipment And Supplies (Not Including)

[Add Values] [Back to Search]

In both screens (**Account** and **Commodity Code**) choose a default value from the available list, click the **Default** check box, and then click **Save**.