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 \clubsuit icon \rightarrow View My Profile (located in the upper right-hand corner of the screen.)

Search (Alt+Q)	۹	0.00 USD	Ä	♡ ■	<u>+ 1</u>
TEST EPROC1					
View My Profile					
Dashboards					
Manage Searches					
Manage Search Expo	orts				
	Search f	ailed. Please tr	ry again.		
				Logout	Help

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

TEST EPROC1		User's Name, Phone	Number, Email, etc.	2
User Name EPROC1		First Name	TEST	
User Profile and Preferences User's Name, Phone Number, Email, e Language, Time Zone and Display Se	≮ tc. tings	Last Name Phone No.	EPROC1	
Early Access Participation Guided Tour Instructions		Mobile Phone Number	International phone numbers must begin with +	
Update Security Settings Default User Settings	>	User E-mail *	FIS21@PACE.EDU	
User Roles and Access	>	User Division	Information Technology Services (Information Technology Services)	
Ordering and Approval Settings Permission Settings	>	User Position	Standard Requisitioner	
Notification Preferences	>	Authentication Method	Local	
User History Administrative Tasks	>	User Name *	EPROC1	
		Organization Terms and C	Conditions accepted on 8/25/2017 1:10 PM Terms and Conditions	
		★ Required	Save Cha	nges

Verifying User Profile – Ship To Address

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

ser Name EPROC1		Ship To Bill To	
User Profile and Preferences	>	Select an address to edit	Select Addresses for Profi
Update Security Settings	>	Shipping Addresses	
Default User Settings	<	163 William 🏠	
Custom Field and Accounting Code E	efaults	AN00	
Default Addresses		CP08	
Cart Assignees	_		
Financial Approvers			
User Roles and Access	>		
Ordering and Approval Settings	>		
Permission Settings	>		
Notification Preferences	>		
11 11-+			

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
Shipping Addresses	Address Search
163 William	
AN00	Nickname / Address summit
CP08	Results Per Page 10 V Search
	Addresses Found: 1 🔹 Page 1 of 1 上
	Address Contact Name ATTN TO: Phone +1 914-923-2899 Email FIS21@PACE.EDU 100 Summit Lake Drive 3rd Floor Valhalla, NY 10595 United States

Default Addresses				
Ship To Bill To Select an address to edit	Se	ect Addresses for Profile Delete Add	? ress	 In the Nickname field, type the name to be given to this address.
Shipping Addresses	Edit Selected A	ddress	?	Otherwise, leave the
163 William	 Nickname 	CN05		code that populates.
AN00	Default			• Click the Default box if
CP08	Current Default Address	CP08		this is the address that
	A D D R E S S			is most frequently
	Attn: *	ATTN TO: Test User		shipped to
	Room: *	1		
	Address 1	156 William		
	🚽 Address 2	156 William Street		
	Building	Building 156 WIL		
	City	New York		In the Contact Name
	State/Province Postal Code	NY 10028		field true the news of
	Country	United States		field type the name of
	country			the person who the
		Save		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	Edit Selected Addre	ess ?
163 William	Nicknamo	162 William
AN00	Default	
CN05	Current Default Address	CP08
CP08	A D D R E S S	
	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

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**.

Default Addresses								
Ship To Bill To								
		2						
Select an address to edit	Selec	t Addresses for Profile Delete Address						
Shipping Addresses	Edit Selected Add	ress ?						
163 William	Nickname	163 William						
AN00	Default							
CN05	Current Default Address	CP08						
CP08	A D D R E S S							
	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						

***<u>PLEASE NOTE</u>: 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

TEST EPROC1	Custom Field and Accounting Code Defaults							
User Name EPROC1	Header (int.) Header (ext.) S	Supplier Codes Code	Favorites Internal I	nformation				
User Profile and Preferences	Custom Field Name	Default Value	Description	Edit Values				
Update Security Settings	Payment Amount	No Default Value		Edit				
Default User Settings	Check Amount	No Default Value		Edit				
Custom Field and Accounting Code Defaults	Special Instructions	No Default Value		Edit				
Default Addresses								
Cart Assignees								
Financial Approvers								

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**

Custo	m Field Name	Def	ault Value	Description	Edit Values
Index		FA526	5	Purchasing & Contracts	Edit
/ Edit	Values				Close
Create	New Value				
			Search For	Value	?
Value	Description	*	Field Name	Index	
FA040	Financial Information Systems (FIS)		Value		
FA526	Purchasing & Contracts	-	Results Per Page	5 🗸	
* Custo marked role-ba	m Field Values with an asterisk a sed values. Users	ire can		Search	

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

Create	Values New Value				Close
Value	Description	-	Results Per	Values Found	Page 1 of 1 💌 🥇
FA040	Financial Information Systems (FIS)		Page 5 🗸	1	in ruge for finite .
FA526	Purchasing & Contracts		Select	Value	Description
L0143	Law Instruction	-			<u> </u>
				FA046	TEST DEMO
* Custo asterisk only mo	m Field Values marked with an are role-based values. Users can adify the Default status of these		A	dd Values	Back to Search

7. 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				
			Edit Existing	Value	?
Value	Description		Value	54046	
FA040	Financial Information		value	FA046	
	Systems (FIS)		Description	TEST DEMO	
FA046	TEST DEMO		Default		
FA501	Sr VP for Finance &	-	Status	active	
* Custo	m Field Values marked			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.

- 8. 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 (<u>PLEASE NOTE</u>: 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		Results Per Found Page 1	Page 1 of 1 💌 🔋						
E19001 Supplies Instructional	and Lab	Select Value	Description						
E19201 Supplies Computer Ac	ccessories 👻		nnlies General	Custon	n Field Name	Default Value		Description	Edit Values
* Custom Field Values marked v	with an	E19602 Offi	Back to Search	Commodi	ty Code	615	Office Su	pplies, Genera	l Edit
asterisk are role-based values. I only modify the Default status	Users can of these	Add Values B		🖊 Edit V	alues				Close
		+		Create N	ew Value				
				Value	Description		A Res	Ults Values	S
				050	Art Equipment	And Supplies	Pag		age for tage :
In both screens (Account and				075	Automotive Sho And Supplies	op Equipment	Sel	ect Value	Description
Commodity Code) choose a			095	Barber And Bea	auty Shop	- <u> </u>			
default value from the available				* Custon	Field Values mai	rked with an		= 000 F Ec Si	upplies (Not Including
and then click Save .				asterisk are role-based values. Users can only modify the Default status of these Custom Field Values. Add Values Back to Search				Back to Search	