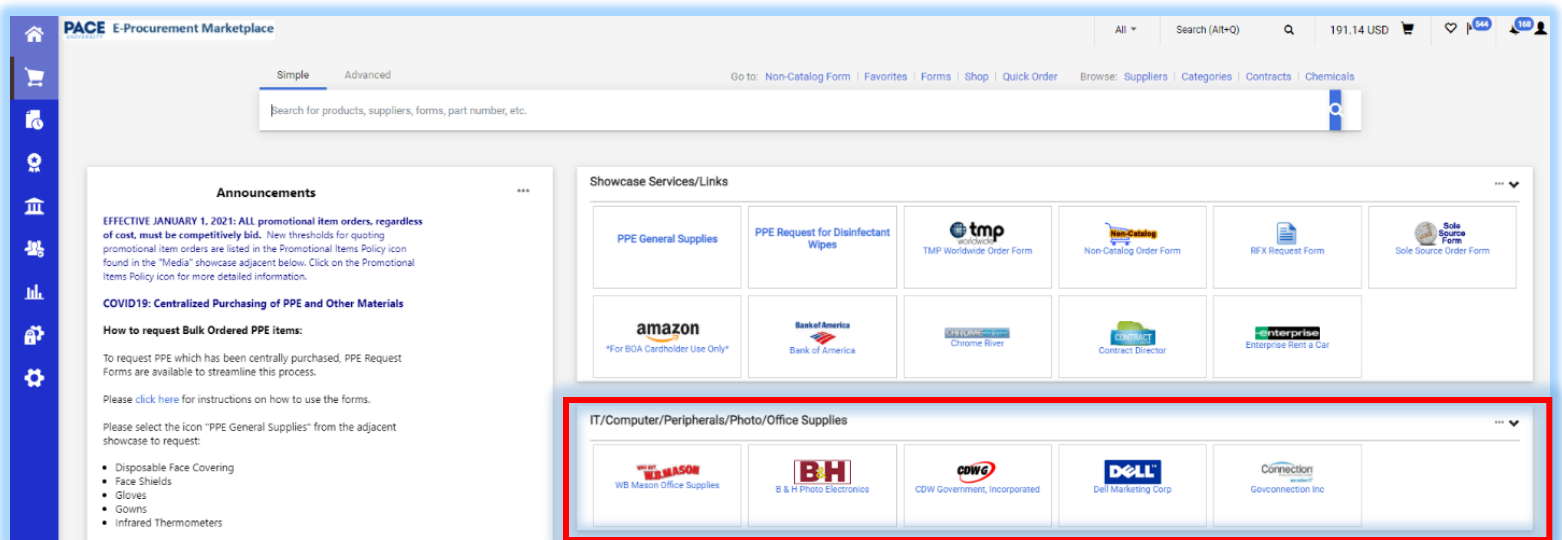


# E-Procurement System Tutorial: Creating a Punchout Purchase Order

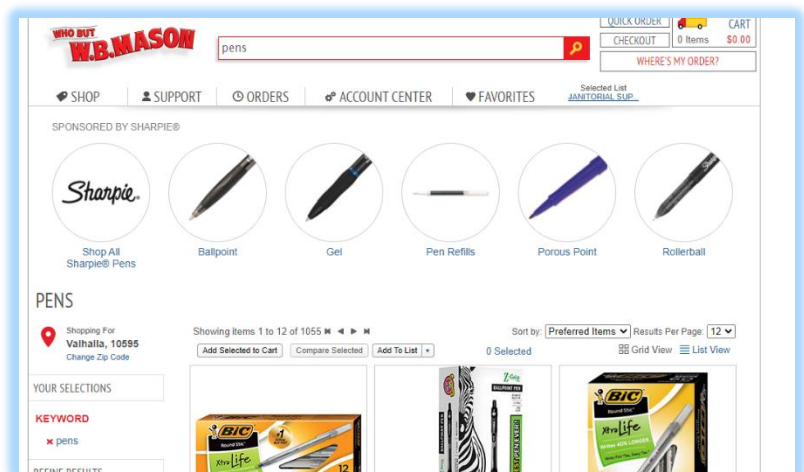
E-Procurement is an online system, which allows the user to purchase products/services from vendors.

When purchasing from a punch-out vendor, you are sent directly to the vendor's website. From the Home Screen of E-Procurement, click on a Punch-out vendor to start shopping. This will bring you directly to the vendor's site.



## Navigating the Vendor Website:

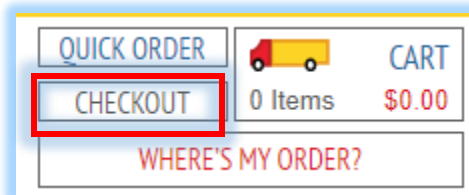
Search for the desired items on the vendor's site.



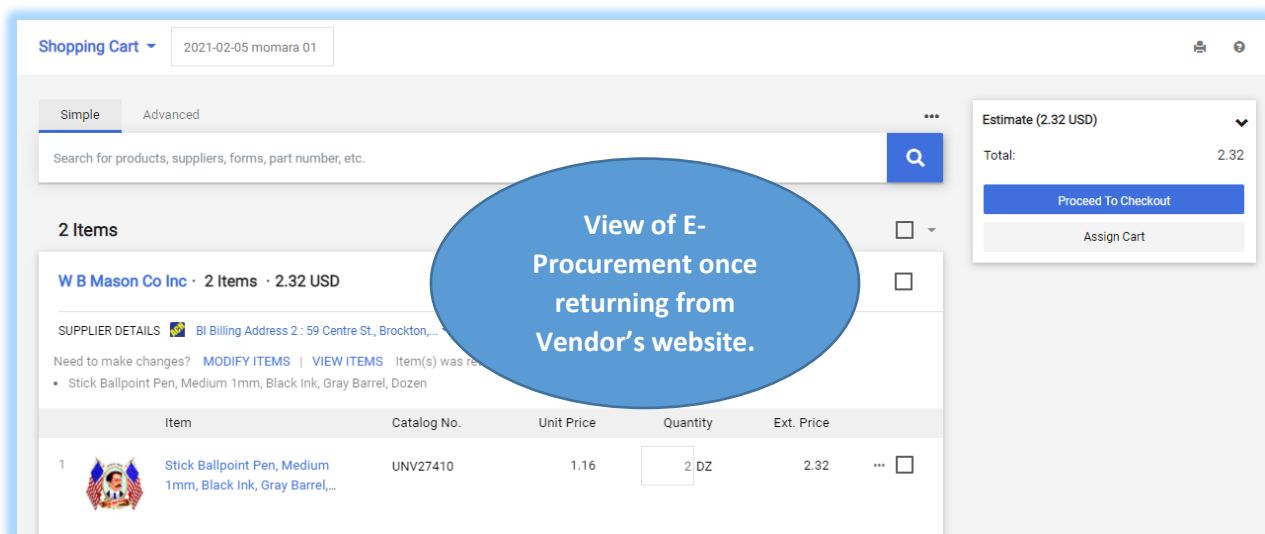
Change the desired quantity of the item and click **Add to Cart**. Then click **Continue Shopping** if additional items are needed OR click on **Continue to Checkout**.



If you continued shopping and are ready to complete your order, click **Checkout** towards the top right of the screen.

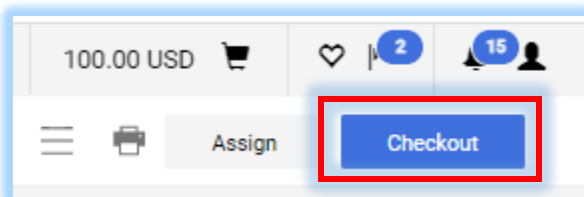
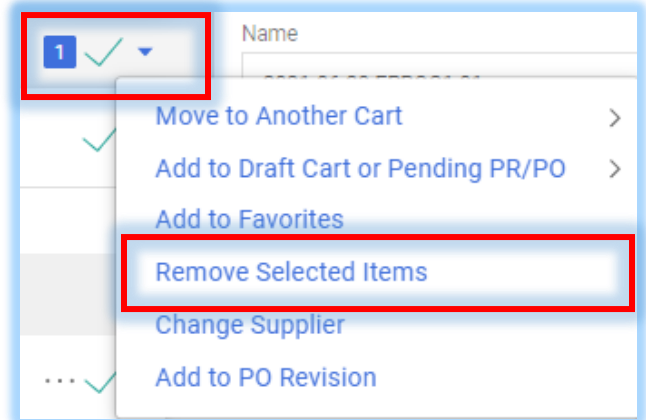


### Shopping Cart:



Multiple items can be added from as many vendors as desired to the cart. This can be done for punch out and non-catalog vendors as well.

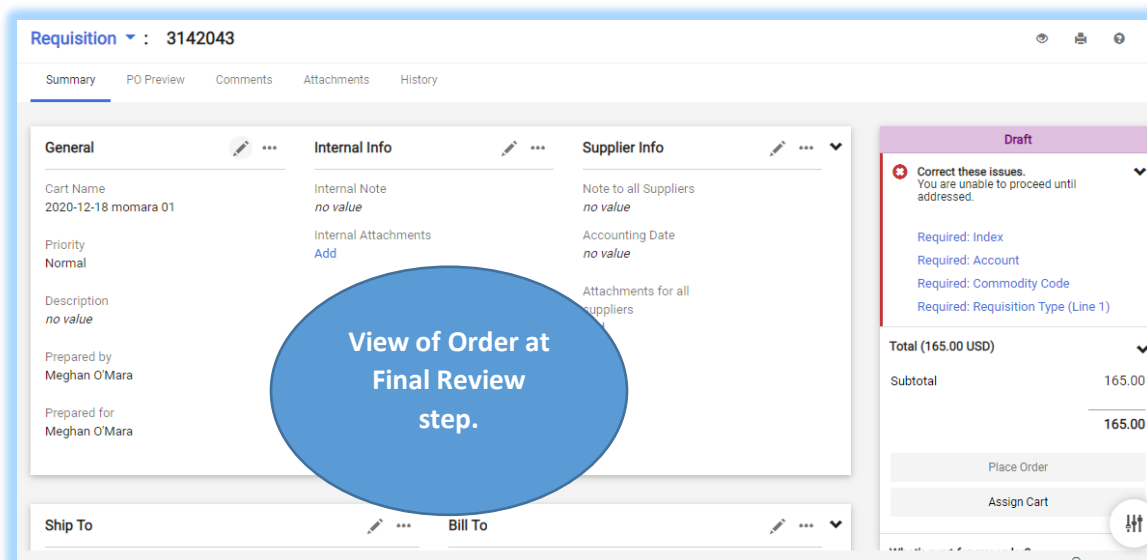
To remove an item, click on the **checkbox** located to the far right of each line item. Click the down arrow to the right of the checkmark at the top right of the line item list and select **Remove Selected Items**.



Once all desired items are in your cart\*, click **Checkout** located in the upper right-hand corner.

**\*PLEASE NOTE:** Once you leave the Shopping Cart, you will no longer have the functionality to remove a line item from your requisition.


### Checkout/Final Review- Entering FOAPAL Values:



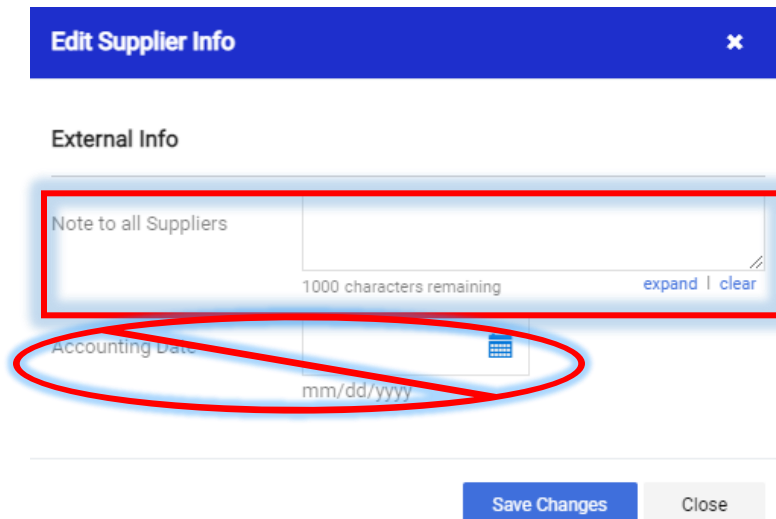
Verify all the information (Ship To, FOAPAL Values, Notes to Suppliers etc.) is correct before sending the information to the vendor. In this section, the user has the ability to edit the document.

To adjust information, click the **Pencil icon**  within the section you would like to edit. Then click on **Save Changes**.


Under the **Supplier Info** section, the user can add a note to the supplier by click on the **Pencil icon**

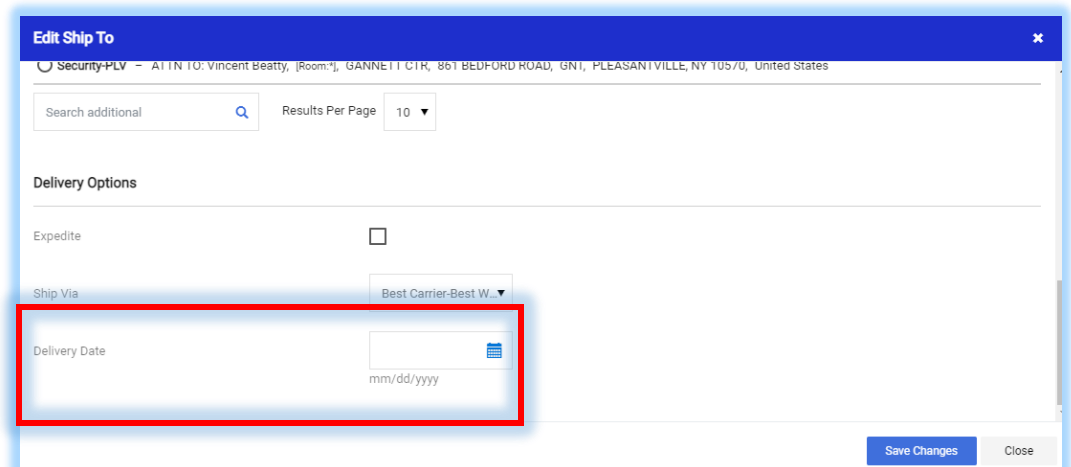
 and entering the note within the **Note to all Suppliers** field (Please be sure the comment is not entered under the Internal Info section as the Supplier cannot view that information). Then click on **Save Changes**.



**PLEASE NOTE: NEVER** enter an **Accounting Date** as that will prevent the requisition from processing.



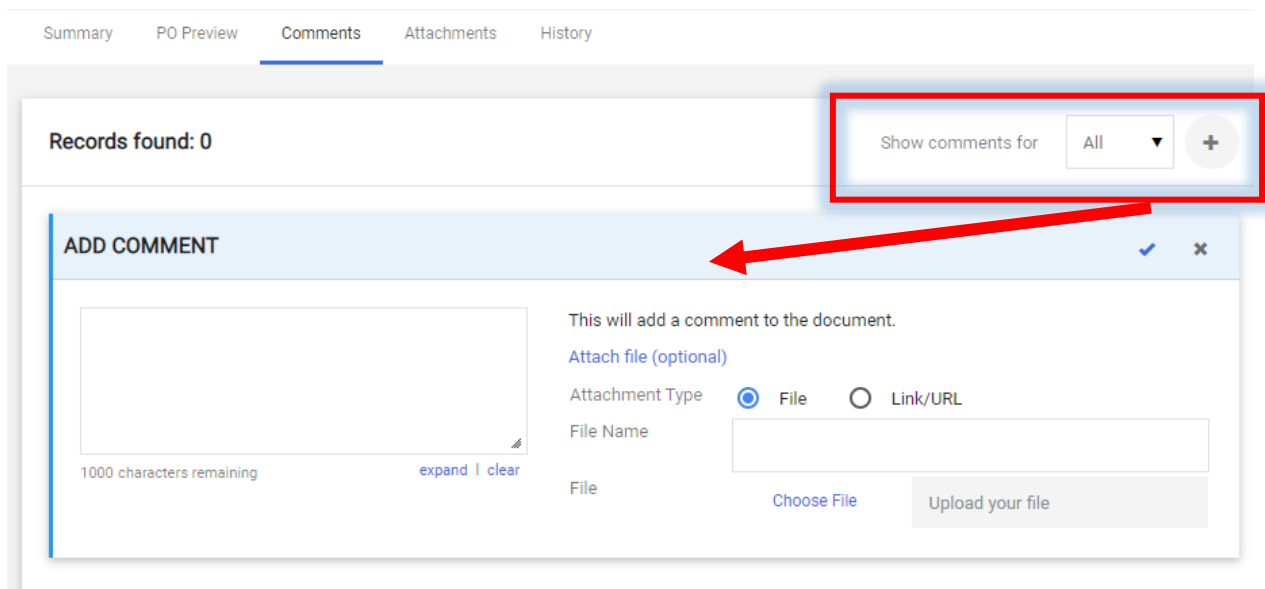
To specify a **Delivery Date** (this is optional), click on the **Pencil icon**


 in the **Ship To** section. In the pop-up box, scroll down to Delivery Options and click on the calendar icon to select the date. Then click on **Save Changes**.




To add **Comments** to the requisition for the Approver and Purchasing Team to see, click on the **Comments** tab and then click on the plus icon,  towards the upper right to add a comment. The user has the option to select which document they would like the comment to appear (ie. Requisition, Purchase Order, Invoice etc. ) by selecting the dropdown menu to the left of the  icon. If not selected it will default to All.

Requisition ▾ : 141319114

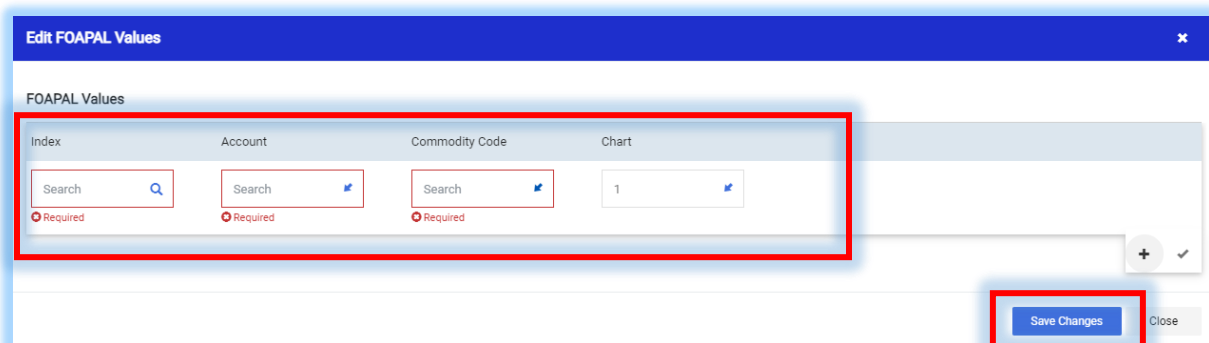



Once the Comment is entered, click on the checkmark icon,  towards the upper right of the Comment box.

**ONLY after the requisition is created and in workflow, can the user specify the person/user they would like to send the comment to.**

To adjust any **FOAPAL Value** information, click the Pencil icon  (located in the upper right of the corresponding box) to modify any values listed.

An **Edit FOAPAL Values** pop-up box will appear.




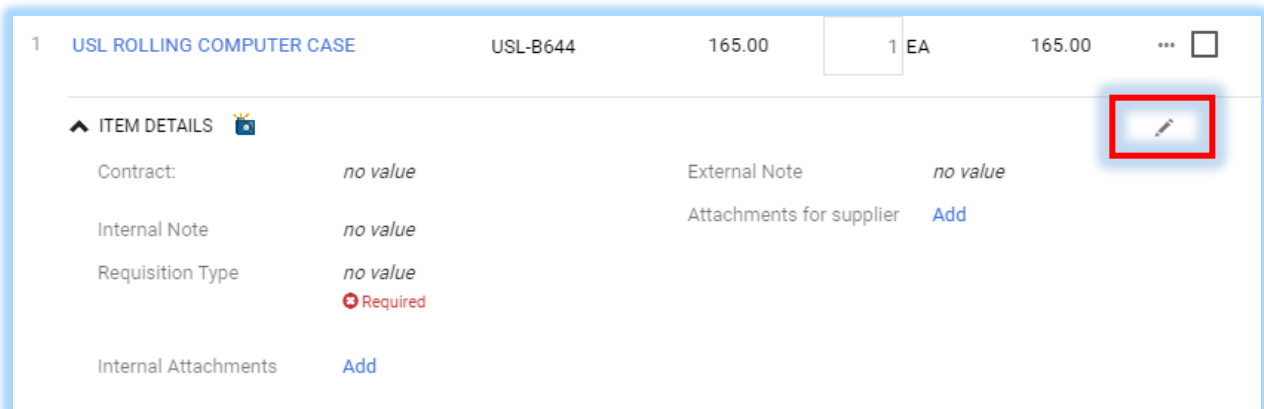
To search for available values, click on the Arrow icon  located towards the right of the field to open a search.

Please refer to additional documentation, **“Adding a Split to FOAPAL Values”** and **“Adding FOAPAL Values on Line Items”** for more information on adding multiple FOAPAL values and updating each line item.

Once completed click on the **Save Changes** button.


### Line Item Changes:

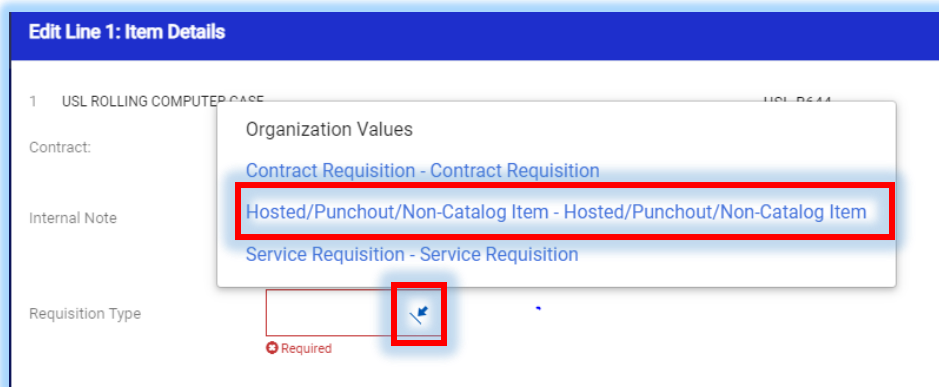
To adjust Supplier/Line Item Details, click the Pencil icon  (located in the upper right of the corresponding box) for the particular item which needs adjusting. After changes have been made, click **Save Changes**.



The screenshot shows a line item details form for 'USL ROLLING COMPUTER CASE' with item number 1, description 'USL-B644', and a quantity of 1 EA. The total amount is 165.00. The form includes fields for Contract, Internal Note, Requisition Type, and Internal Attachments. A red box highlights the pencil icon in the upper right corner of the form, indicating where to click to edit the item details.

When the Edit Line Item Details pop-up box appears it is required to select the **Requisition type**. This value is usually set as a default, but if an error appears follow the below to edit:

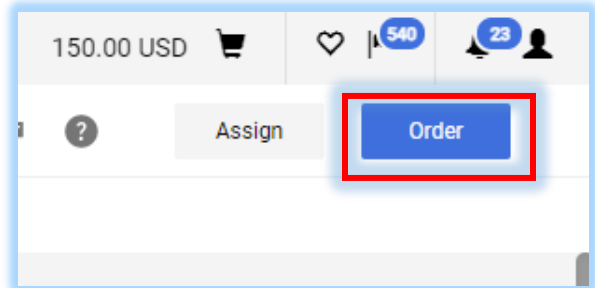
To open the dropdown menu click on the blue arrow  in the right of the field box. Then select **Hosted/Punchout/Non-Catalog Item-Hosted/Punchout/Non-Catalog Item** and click **Save**.



The screenshot shows the 'Edit Line 1: Item Details' pop-up box. It contains a dropdown menu for 'Requisition Type' with a blue arrow icon next to it. The dropdown menu is open, showing four options: 'Organization Values', 'Contract Requisition - Contract Requisition', 'Hosted/Punchout/Non-Catalog Item - Hosted/Punchout/Non-Catalog Item' (highlighted with a red box), and 'Service Requisition - Service Requisition'. A red box also highlights the blue arrow icon next to the 'Requisition Type' field.

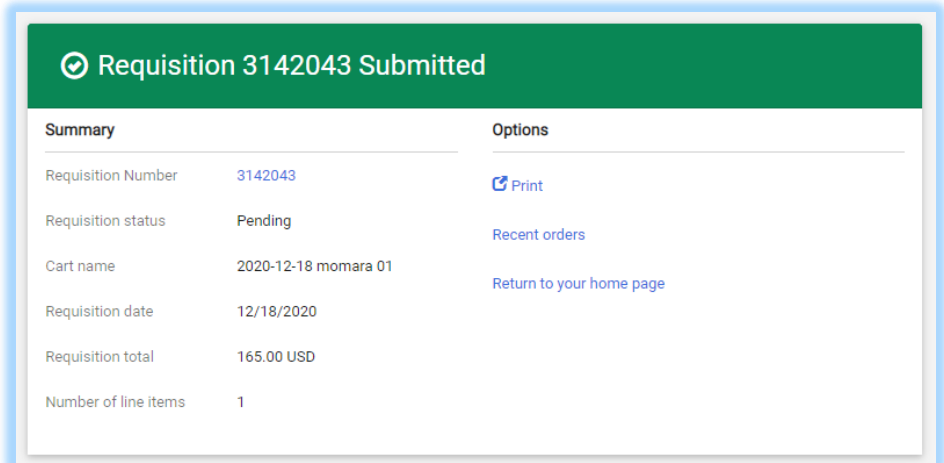
Once all edits have been completed, click on **Order** located towards the upper right of the screen.

The user will receive a requisition number and a confirming email.



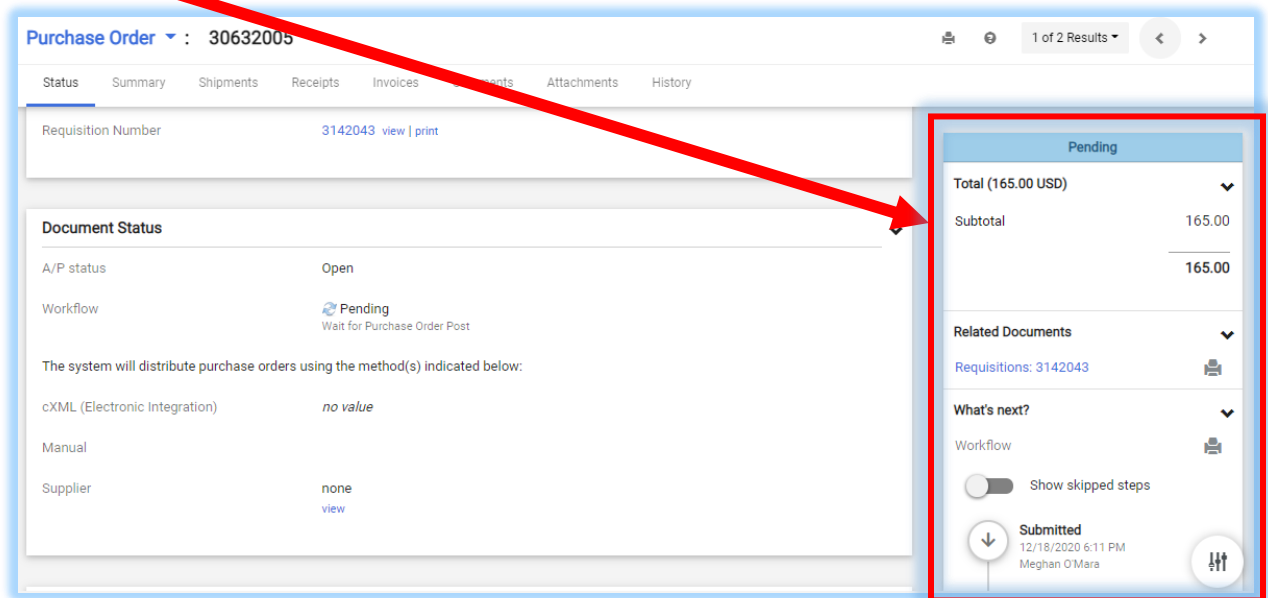
### Viewing the Requisition Status and Details:

To view requisition details after submitting click on the linked **Requisition number:**



**IMPORTANT:** The **Approval Workflow** has moved. It is no longer on a separate tab within the Requisition.

The **Approval Workflow** is showcased in the right hand panel. Use the scroll bar within the panel to view the full workflow:



Click the **History** tab located at the top of the requisition to view details of the workflow.

Click the **Summary** tab and scroll to the bottom (in the Line Item section) to retrieve the **Purchase Order** number.

**1 Item**

Staples · 1 Item · 165.00 USD

**SUPPLIER DETAILS**

**PO Number**  
30632005

Pricing/Discount Code  
no value

Requisition · 3142043

Summary Comments Attachments **History**

Start date End date Action User

Requisition

Document type

Filter Clear All Filters Export CSV

1-19 of 19 Results 20 Per Page

Line No	Date/Time	User	Step(s)	Action	Field Name	From	To	Note
	12/18/2020 6:11:29 PM	System		Requisition approval process completed				
	12/18/2020 6:11:29 PM	System	Create PO	PO Created	PO#:	30632005		
	12/18/2020 6:11:25 PM	Shuana Thompson	Purchasing Approval	Requisition approved				