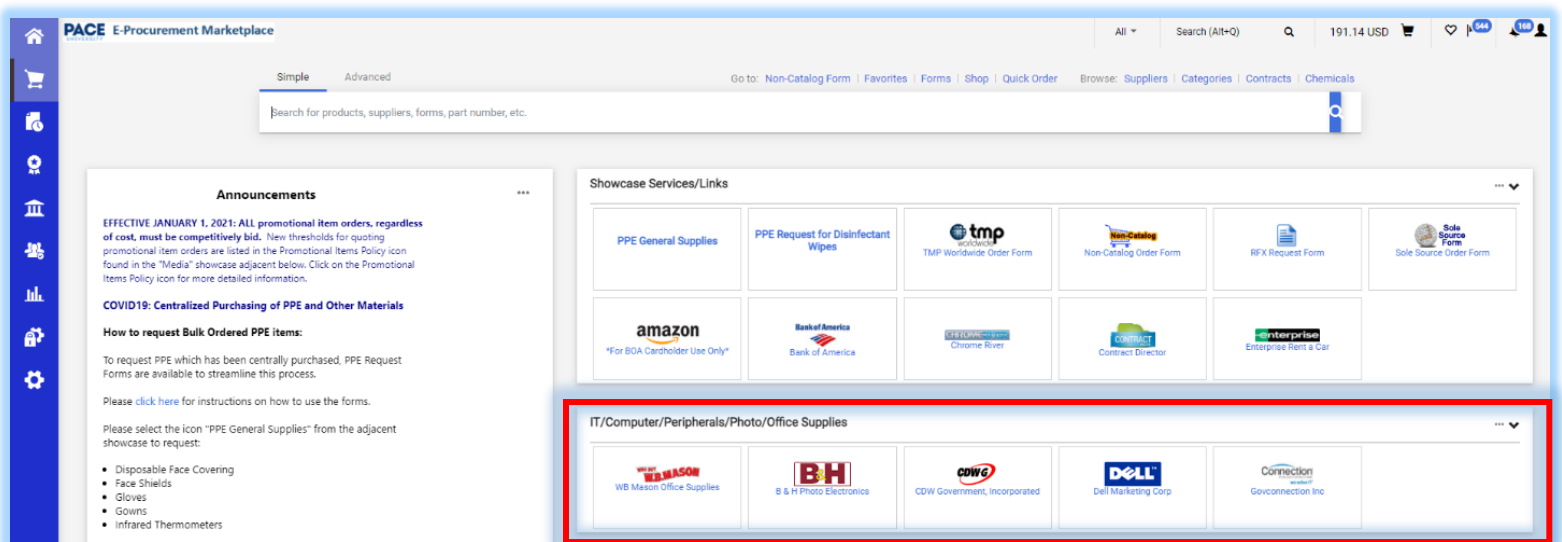


# E-Procurement System Tutorial: Creating a Punchout Purchase Order

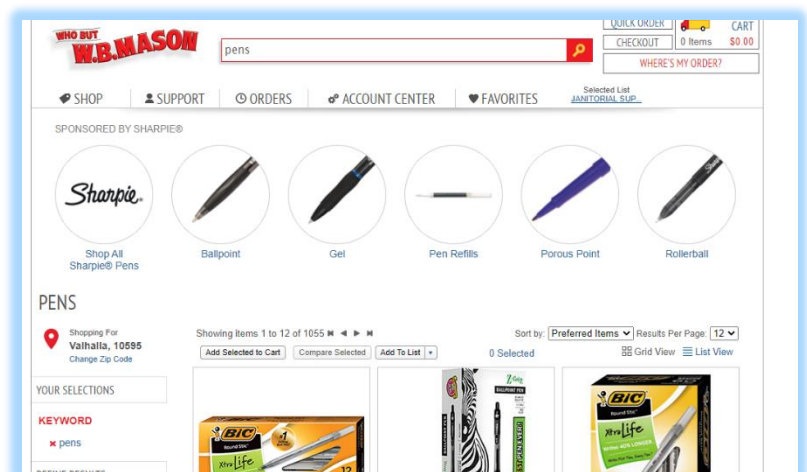
E Procurement is an online system, which allows the user to purchase products/services from vendors.

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:

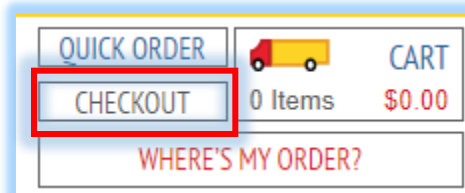
Search for the desired items on the vendor's site.



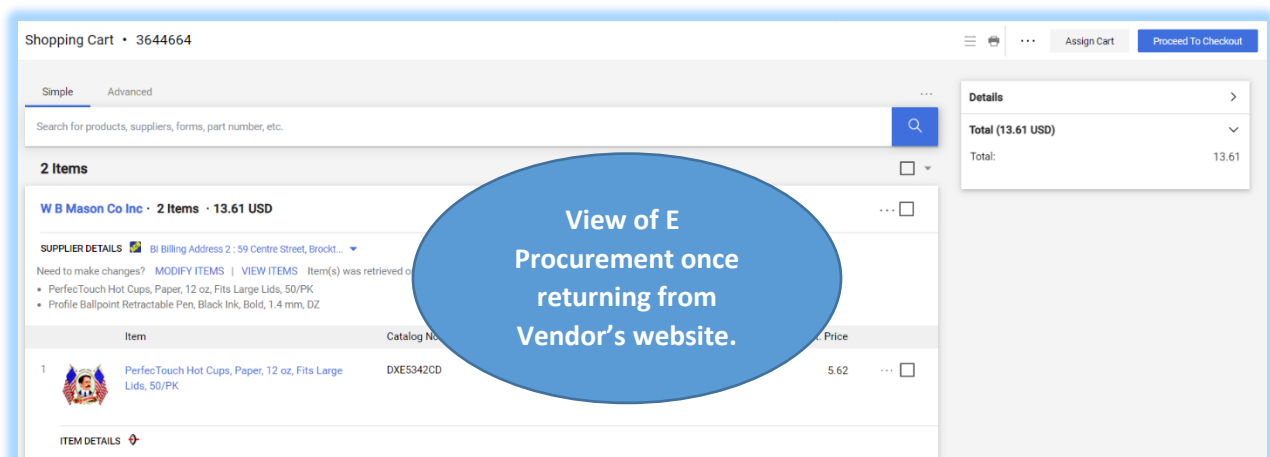
Change the desired quantity of the item and click **Add to Cart**. Then click **Continue Shopping** if additional items are needed OR click on **Continue to Checkout**.



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

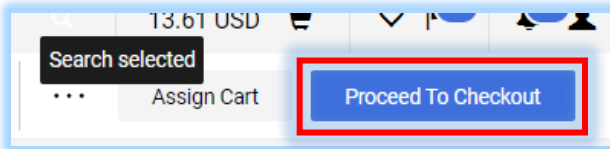
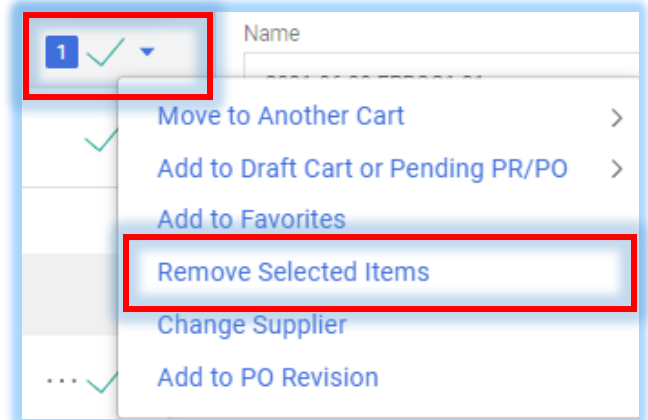


### Shopping Cart:



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 and select **Remove Selected Items**.




Once all desired items are in your cart\*, click **Proceed to 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:

A screenshot of the 'View of Order at Final Review step' interface. The interface is divided into several sections: 'General', 'Internal Info', 'Supplier Info', 'Ship To', and 'Draft'. The 'Draft' section on the right shows a 'Correct these issues' message and a 'Total (13.61 USD)' summary. A large blue oval in the center contains the text 'View of Order at Final Review step.' The 'General' section includes fields for 'Cart Name', 'Priority', 'Description', 'Prepared by', and 'Prepared for'. The 'Internal Info' section includes 'Internal Note', 'Internal Attachments', and 'Add'. The 'Supplier Info' section includes 'Note to all Suppliers', 'Accounting Date', and 'Add'. The 'Ship To' section includes 'Contact Name', 'Phone', 'Email', 'Address', and 'United States'.

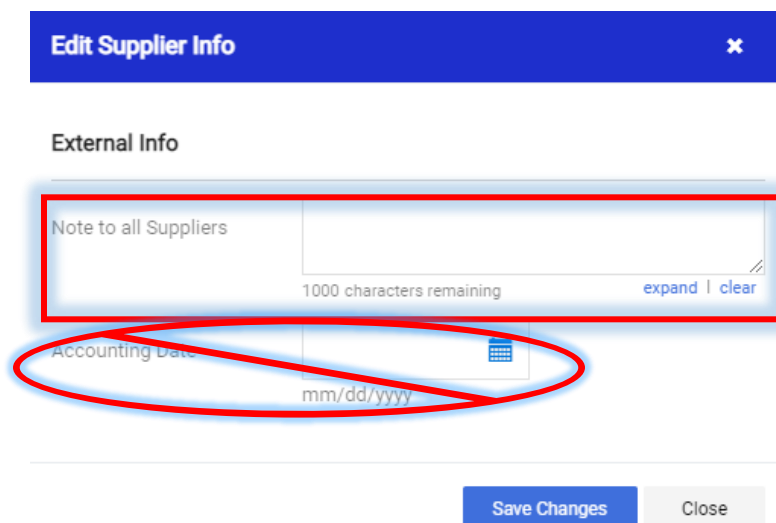
Verify all the information (Ship To, FOAPAL Values, Notes to Suppliers etc.) is correct before sending the information to the vendor. In this section, the user has the ability to edit the document.

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 clicking 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.



**Edit Supplier Info** ×


External Info

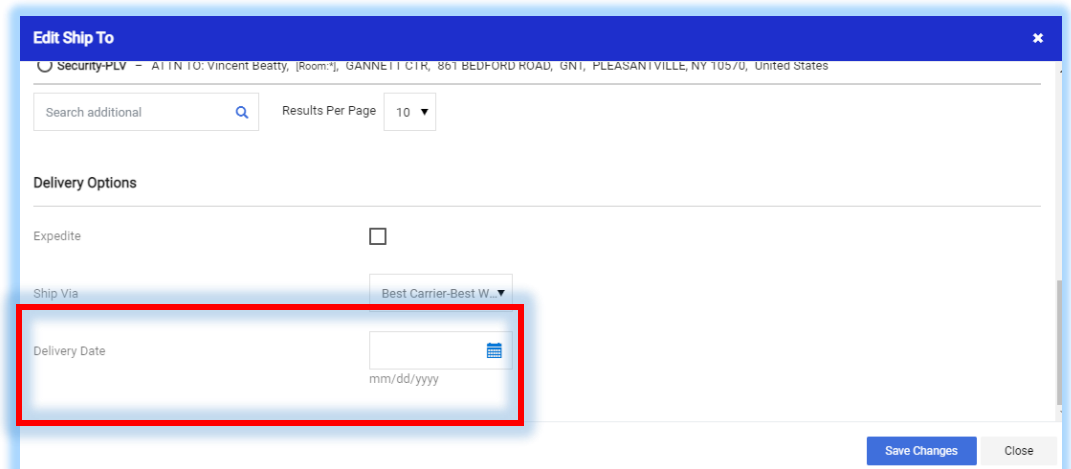
Note to all Suppliers 1000 characters remaining [expand](#) [clear](#)

Accounting Date mm/dd/yyyy

**Save Changes** **Close**

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**.



**Edit Ship To** ×

Security-PLV - ATTN TO: Vincent Beatty, [Room:], GANNETT CTR, 861 BEDFORD ROAD, GNI, PLEASANTVILLE, NY 10570, United States

Search additional Q Results Per Page 10 ▼

Delivery Options

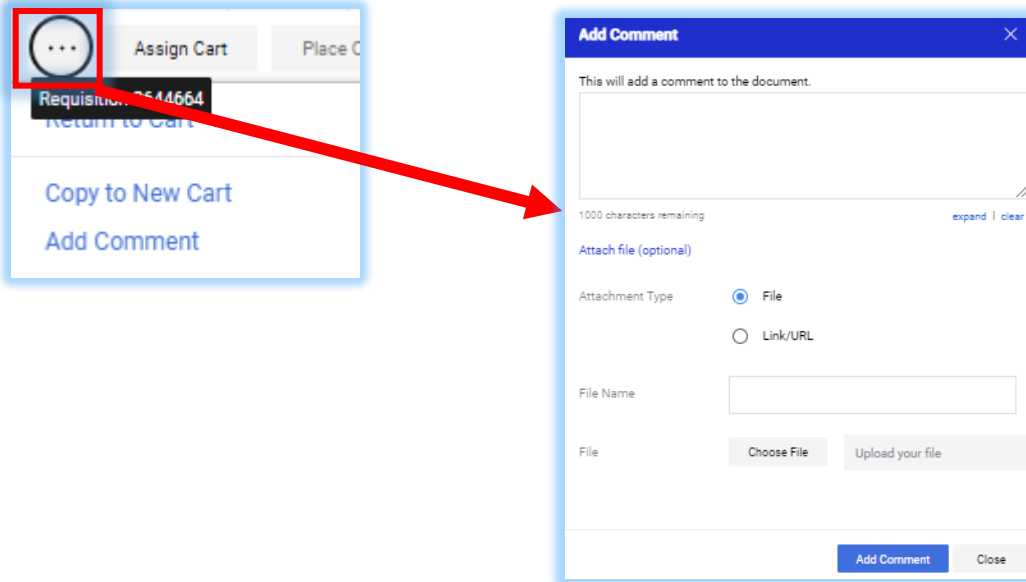
Expedite ☐

Ship Via Best Carrier-Best W. ▼


Delivery Date mm/dd/yyyy

**Save Changes** **Close**


To add **Comments** to the requisition for the Approver and Purchasing Team to see, click on the menu (the **...** in the upper right) and select **Add Comment**. Then enter the comment in the pop-up box (the option to attach a document is available). Then click the **Add Comment** button.



**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.

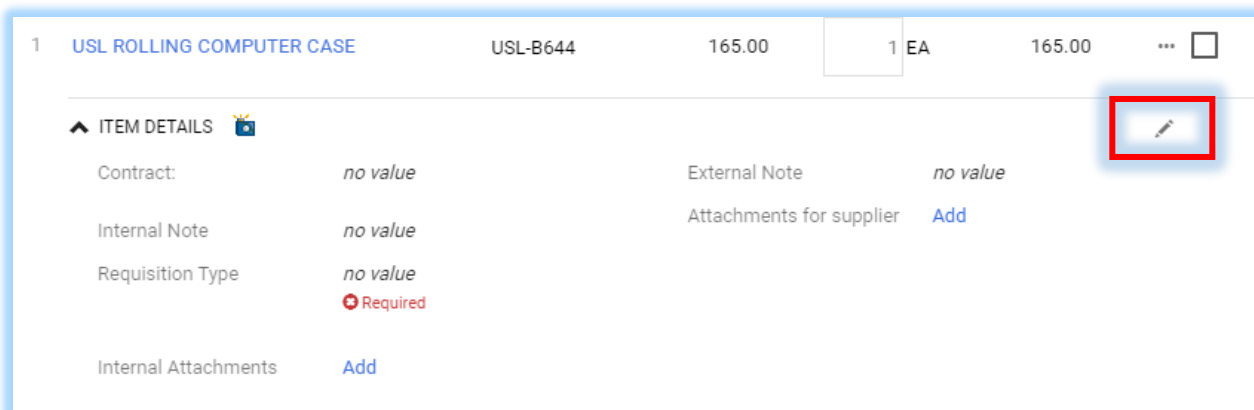
To search for available values, click on the Arrow icon  located towards the right of the field to open a search.


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**.




1	USL ROLLING COMPUTER CASE	USL-B644	165.00	1	EA	165.00	...	
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ITEM DETAILS 

Contract: no value External Note no value

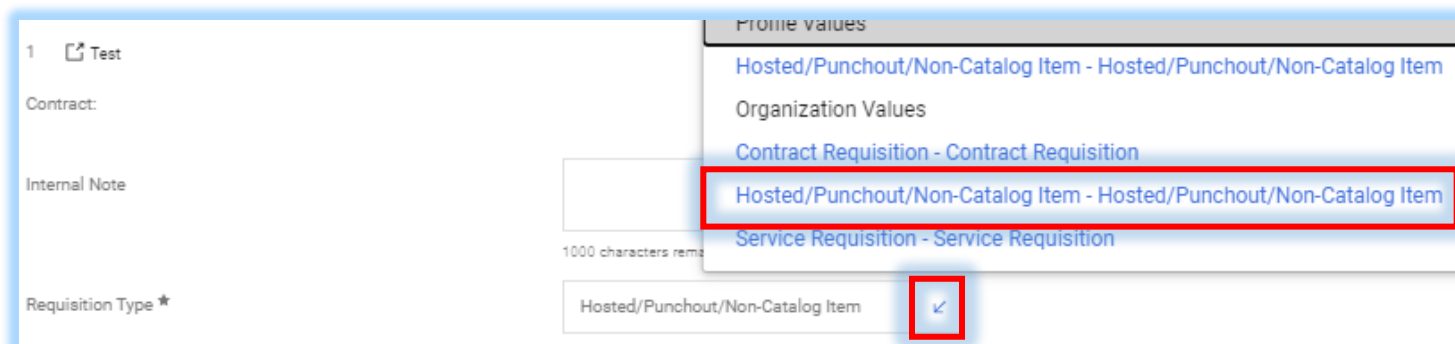
Internal Note no value Attachments for supplier [Add](#)


Requisition Type no value  Required

Internal Attachments [Add](#)

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**.



1 

Contract:

Internal Note

Requisition Type ★

Hosted/Punchout/Non-Catalog Item

1000 characters remaining

Profile values

Hosted/Punchout/Non-Catalog Item - Hosted/Punchout/Non-Catalog Item


Organization Values

Contract Requisition - Contract Requisition

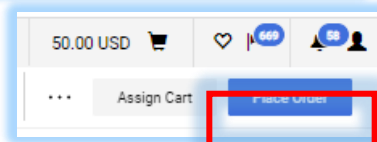
Hosted/Punchout/Non-Catalog Item - Hosted/Punchout/Non-Catalog Item


Service Requisition - Service Requisition




Hosted/Punchout/Non-Catalog Item



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



50.00 USD 

 669  58 

... [Assign Cart](#) [Place Order](#)

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

### Viewing the Requisition Status and Details:

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

✓ Requisition 3644629 Submitted	
Summary	Options
Requisition number	3644629
Requisition status	Pending
Cart name	2022-11-04 momara 02
Requisition date	11/4/2022
Requisition total	50.00 USD
Number of line items	1
<a href="#">Print</a>	
<a href="#">Recent orders</a>	
<a href="#">Return to your home page</a>	

**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:

The screenshot displays the 'Requisition • 3644629' page. The main content area is divided into sections: General, Internal Info, Supplier Info, Ship To, and Bill To. A red arrow points from the text 'view the full workflow:' to the right-hand panel, which is titled 'Pending'. This panel shows a summary of the requisition (Total: 50.00 USD) and a 'What's next?' section. The 'What's next?' section lists the workflow steps: Submitted (Completed), Banner Budget Check (Completed), and Department Approval (Active). The Department Approval step is highlighted with a red circle.

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 · 3644629

**Summary** PO Preview Comments Attachments **History**

Start date  End date

mm/dd/yyyy mm/dd/yyyy

Requisition  Document type

Filter Clear All Filters

Line No	Date/Time ↓	User	Step(s)	Action
	11/4/2022 11:16:46 AM	System	Banner Budget Check	Requisition approved
	11/4/2022 11:16:37 AM	Meghan O'Mara		Requisition submitted
	11/4/2022 11:15:07 AM	Meghan O'Mara		Requisition modified