E-Procurement System Tutorial

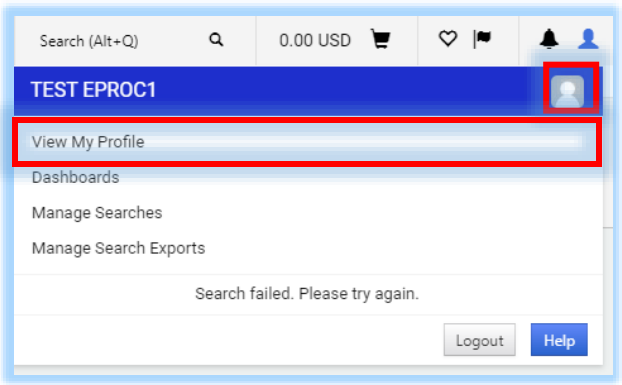
Verifying your Profile Information

Accessing E-Procurement

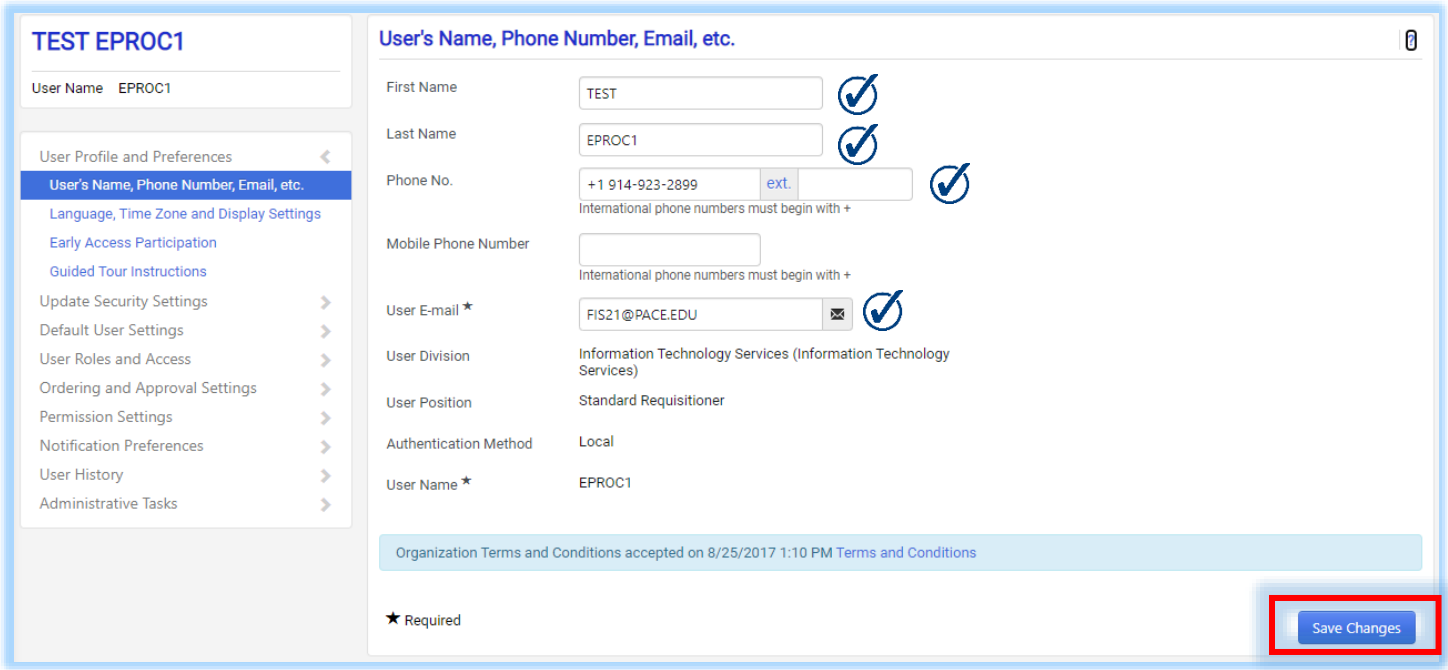
Log on to MyPace Portal, click the Staff tab and click E-Procurement.

Verifying User Profile – User Identification

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

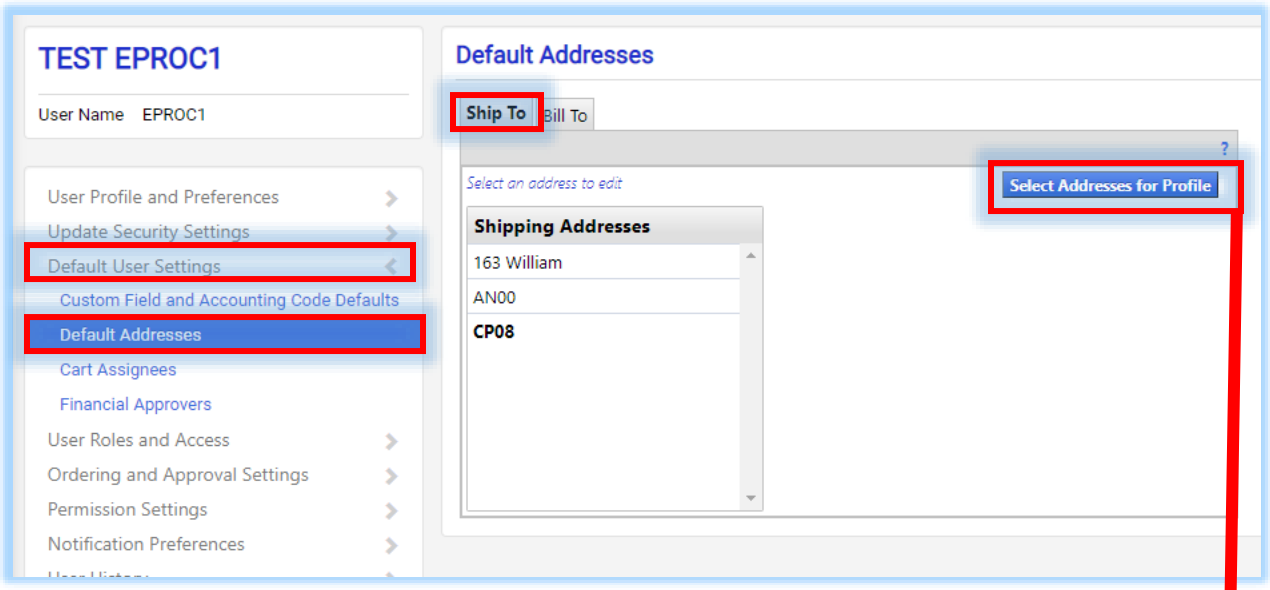


Verify that the information contained in the User's Name, Phone Number, Email, etc. section is correct. Make any necessary changes and click Save.



Verifying User Profile – Ship To Address

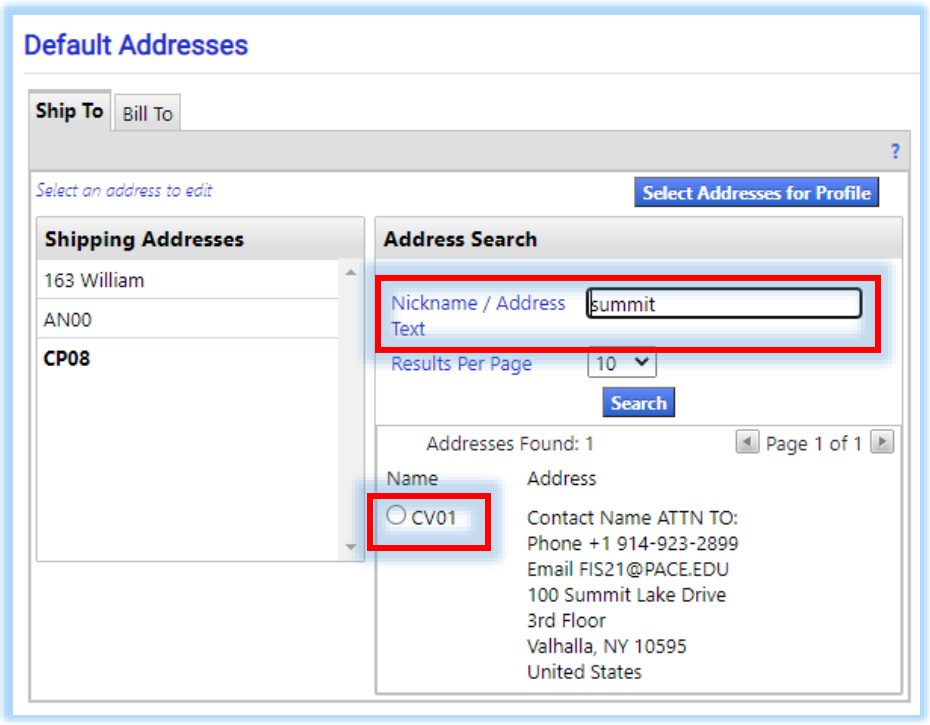
1. Click **Default User Settings**.
2. Click **Default Addresses**.
3. Click the **Ship To** tab

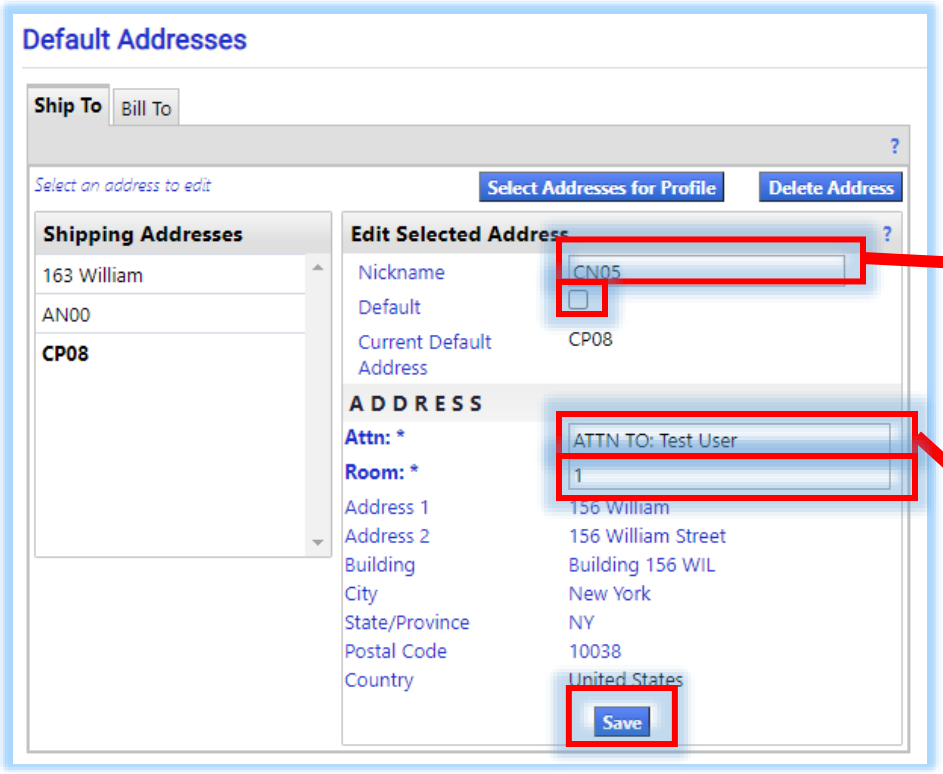


Click the **Ship To** tab to select the Ship To address.

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.



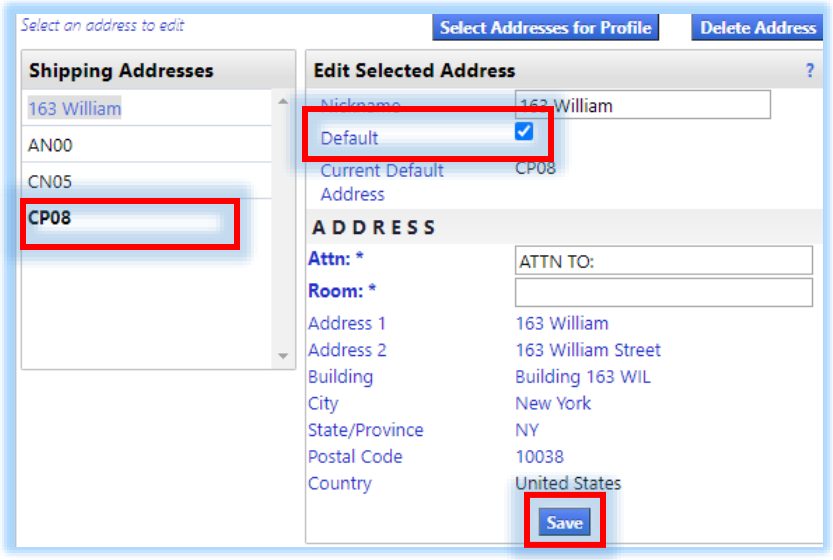


- In the **Nickname** field, type the name to be given to this address. Otherwise, leave the code that populates.
- Click the **Default** box if this is the address that is most frequently shipped to

- 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.

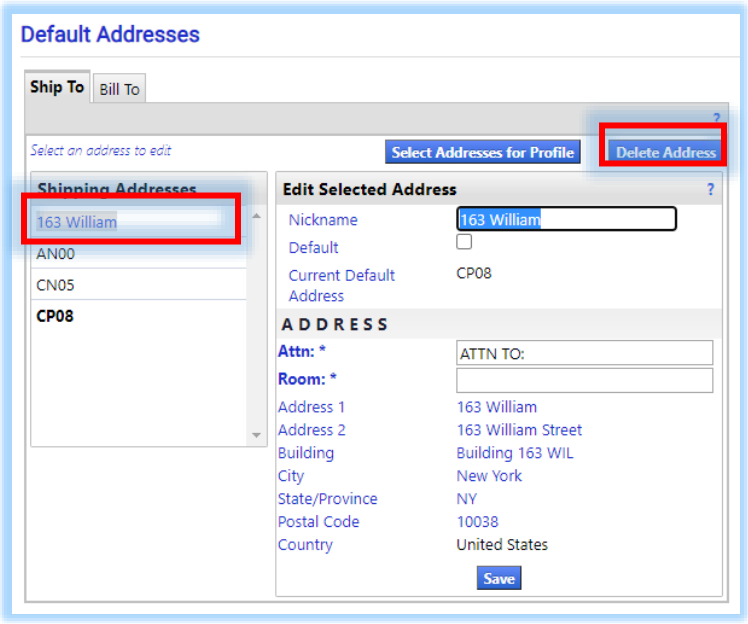
To set the address as your **Default**, click on the nickname to the left and check the **Default** checkbox to the right. Then click **Save**.



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**.

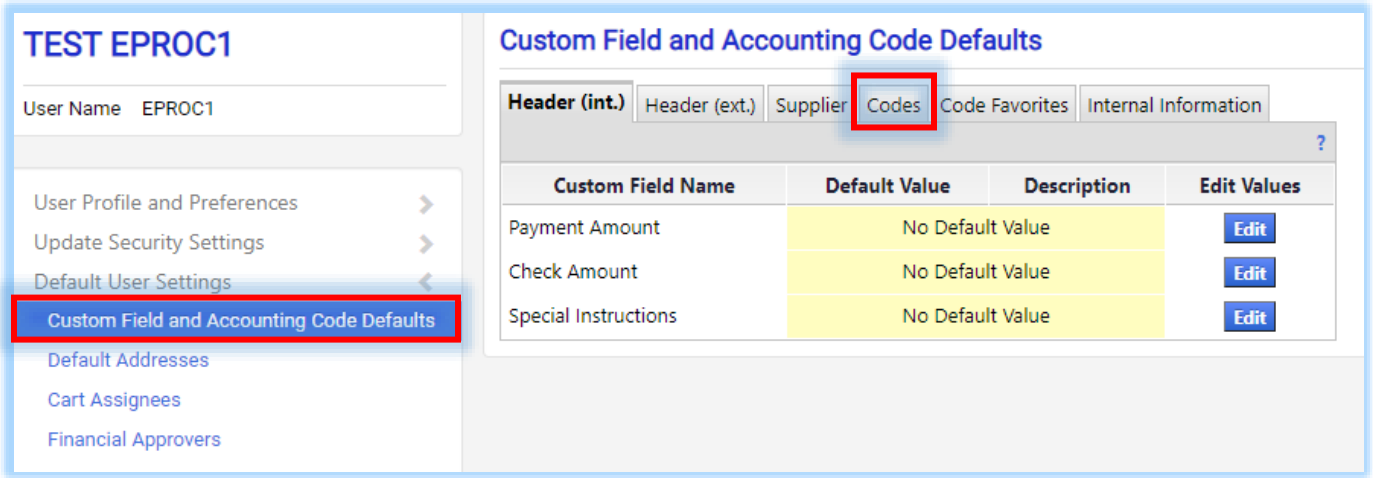


***<u>**PLEASE NOTE**</u>: The **Bill To** Address on the **Bill To** tab will always default to the Accounts Payable PO Box. It should NOT be updated. ***

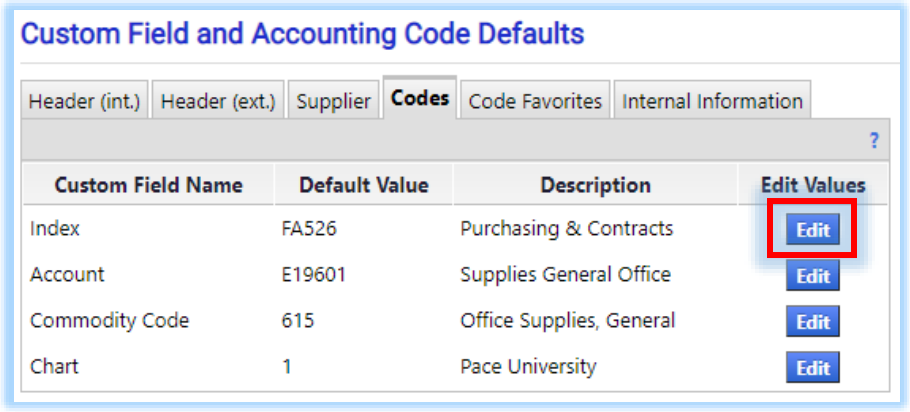
Verifying User Profile – FOAPAL (Fund, Organization, Account, Program, Activity, Location) Values

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

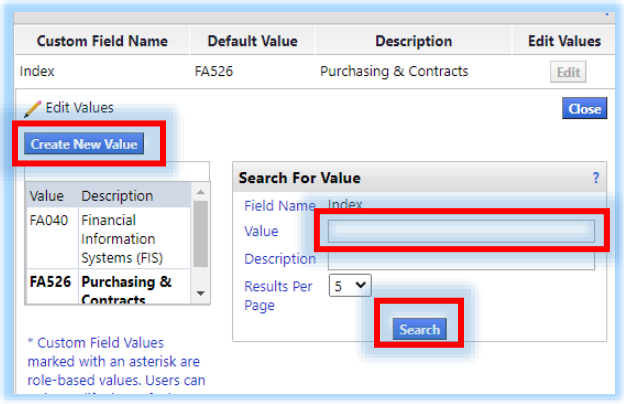
1. Click the **Default User Settings** section
2. Click **Custom Field and Accounting Code Defaults** Section
3. Click the **Codes** tab



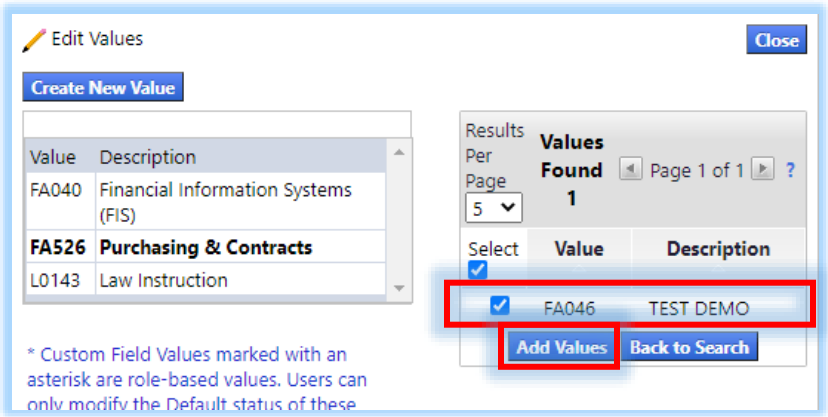
4. Then click on the **Edit** button in the **Index** row



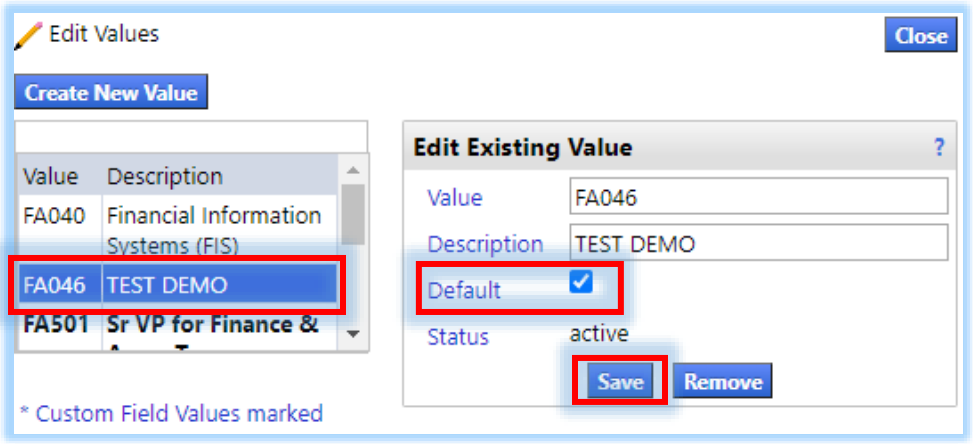
5. Click **Create New Value**, enter the Index to be added in the **Value** field and click **Search**



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



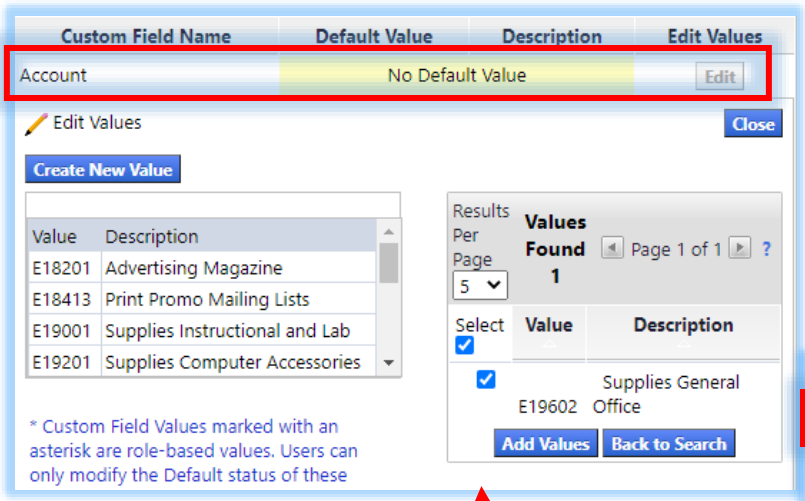
7. To set Index as **Default**, click on the Index from the left-and list and select the **Default** checkbox to the right. Then click **Save**

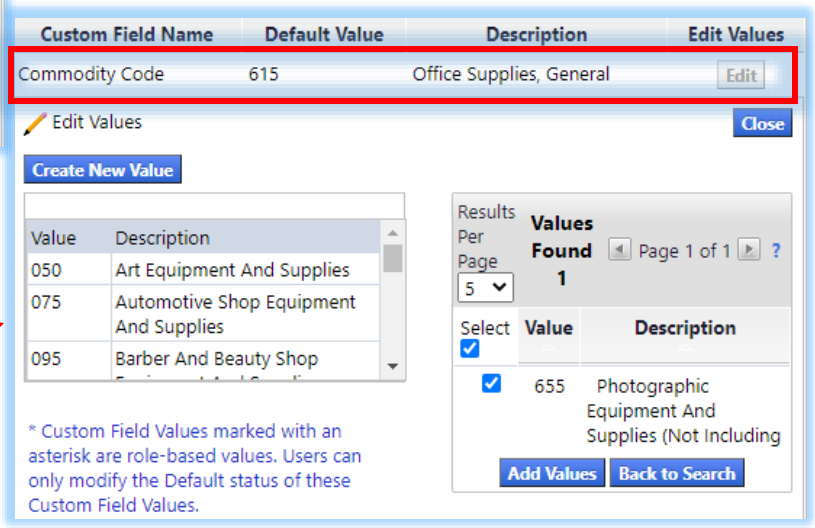


PLEASE NOTE: By defaulting a code you are noting this a code most frequently used. You can still edit the code at the Requisition step if charging to a different index.

8. Click the **Codes** tab to return to the Custom Field and Accounting Code Defaults

9. Click **Edit** to choose a default value for Account and Commodity Code (**PLEASE NOTE:** Chart should always be defaulted to "1-Pace University")





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