

# E-Procurement System Tutorial

## *Creating a Hosted Catalog Purchase Order*

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

### Creating a Purchase Order – Hosted

This will allow you to shop from the catalogs that have been established by selected vendors. There are several search options available to browse for products. Which include vendor, catalog number and various other descriptions.

- Click on the **Shop** drop down menu to select a category, and type the keyword of the item you are search for and then click on the **Go** button.

Welcome to Pace University's online E-procurement Marketplace!

The Purchasing department has recently added a new vendor to our e-Procurement Marketplace, Daniels Sharpsmart!

Daniels Sharpsmart provides pickup and disposal for regulated medical waste (RDM). In addition to RDM, Daniels also provides service for sharps waste which includes needles, syringes, scalpels, broken glass and other items capable of penetrating and damaging skin.

Daniels is a specialized service for departments such as Biology, Nursing, Athletics and other laboratories. If you have items that require this method of specialized pickup please contact Purchasing and Contracts (x22641) or Daniels International (312-546-8900) to find out if Daniels is the appropriate vendor.

**Showcase Links**

- BLOG Purchasing & Contract
- UsBank UsBank
- Vendor Management System

**Showcase Services**

- Chartwells Dining Services
- Florist Order Form - New York
- Daniels Sharpsmart Form
- Non-Catalog Form
- RFX Request Form
- Sole Source Order Form
- tmp Worldwide

- Choose the quantity and click **Add to Cart**. You can also add any items to your **Favorite** folder or select different item to compare.

Shop Everything computers

Go to: advanced search | favorites | forms | non-catalog form | quick order Browse: suppliers | categories | chemicals

Results for: Everything : computers

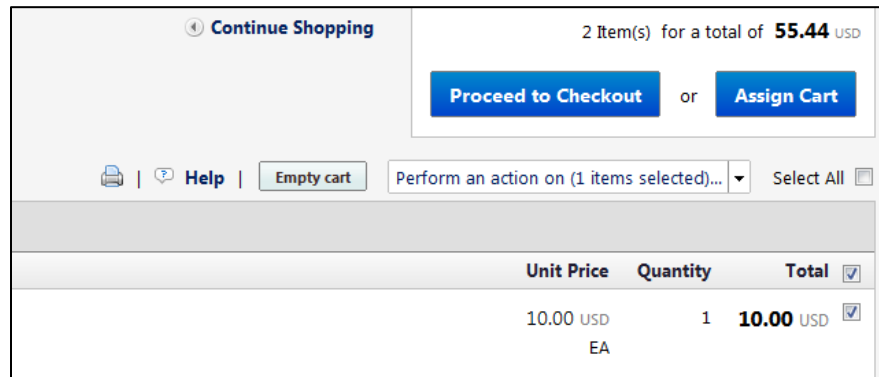
Showing 1 - 20 of 1872 results Compare Selected: 0

Results per page 20 Sort by: Best Match Page 1 of 94

<b>Cable assay, 2100N/AN Computer</b> from Sigma-Aldrich	9.99 USD
Part Number Z800880-1EA	EA
Manufacturer Info Z800880 - (SIGMA-ALDRICH)	
1	Add to Cart
add favorite   compare	
<b>CART COMPUTER CY</b> from Staples	9.99 USD
Part Number BSH-MM50500	EA
Manufacturer Info BSH-MM50500 - (BUSH)	
1	Add to Cart
add favorite   compare	
<b>CART COMPUTER SD/MPL</b> from Staples	9.99 USD
Part Number BSH-MM80302	EA
Manufacturer Info BSH-MM80302 - (BUSH)	
1	Add to Cart

- ✓ If you are finished shopping, click **your shopping cart** (located in the top right of the page).
- ✓ If there are additional items that need to be added to the cart, continue shopping. 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.
- ✓ Select any items to be removed by clicking the select box located to the far right of the line item. Click the drop-down menu that reads **Perform an action on**. Click **Remove Selected Items**. Click **Go**.

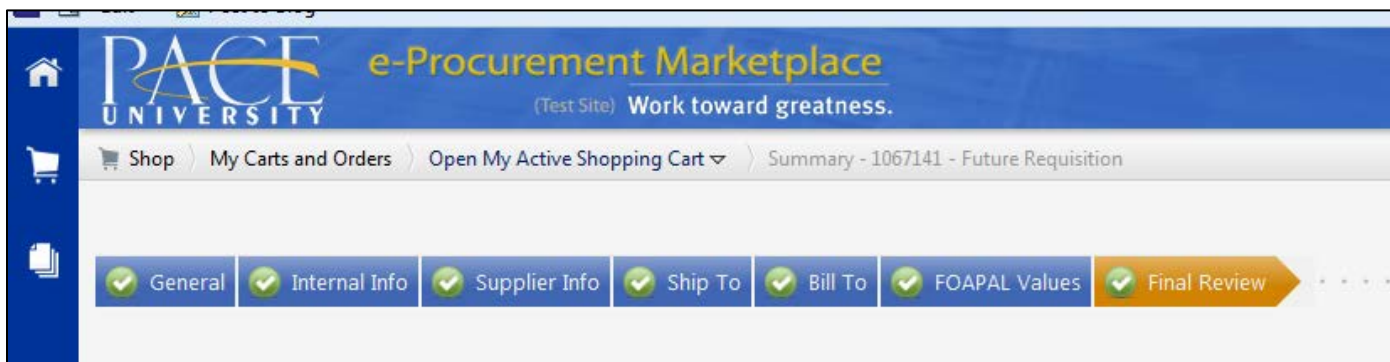
*Note: unwanted items are deleted.*



- Once all desired items are in your cart, click **Proceed to Checkout**.

### Final Review

Verify all the information (Ship To, Bill To, FOAPAL Values etc.) is correct before sending the information to the vendor. In this section, the user has the ability to edit the entire document, or each line item individually.



- To adjust the **Summary** information, click **Edit** (located in the upper right of the corresponding box) for the particular section which needs adjusting. After changes have been made, click **Save**.

The screenshot displays the 'Summary' page of a requisition in the PACE University e-Procurement Marketplace. The page is divided into several sections, each with an 'edit' button highlighted in red:

- General:** Contains cart name, priority, description, and preparer information.
- Internal Info:** Contains internal notes and attachments.
- Supplier Info:** Contains notes to all suppliers and accounting date.
- Ship To:** Contains shipping address and delivery options.
- Bill To:** Contains billing address.

A yellow message box at the top indicates that the requisition is ready for submission.

- To adjust any **FOAPAL Value** information, click **Edit** (located in the upper right of the corresponding box) to modify any values listed. After changes have been made, click **Save**.

The screenshot shows the 'FOAPAL Values' table with the following data:

Index	Account	Commodity Code	Chart
FA040	E18401	10000723	1
Financial Information Systems	Print Promo Alumni News	10000723-test	Pace University

An 'edit' button is highlighted in red in the top right corner of the table.

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

The screenshot displays the 'Supplier / Line Item Details' page for Chartwells Dining Service Law School. It includes a table for line items and a summary section:

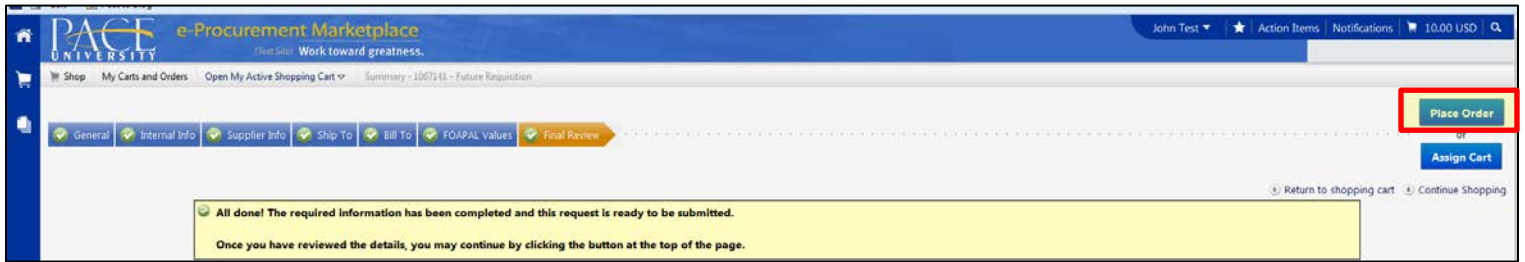
Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 test	test	EA	10.00	1 EA	10.00 USD

The summary section shows:

- Supplier subtotal: 10.00USD
- Subtotal: 10.00
- Total: 10.00 USD

Two 'edit' buttons are highlighted in red: one in the top right corner and one in the bottom right corner of the line item table.

- Once all edits have been completed, click **Place Order**.



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

**Requisition Information**

✔ **Congratulations! You have successfully submitted your request. If you need to view or print a copy, click [Quick View](#) or view its status on the Approvals Tab.**

Here is a summary of the requisition. You can also retrieve this requisition at any time via the document history search page.

Requisition number	1067141 <a href="#">view</a>
Requisition status	Pending
Cart name	2013-12-05 jtest0000 02
Requisition date	12/11/2013
Requisition total	10.00 USD
Number of line items	1

What would you like to do next? Here are links to some common actions.

- Search for another item
- View order history
- Check the status of an order
- Return to your home page
- Create new draft cart

### Viewing the Requisition status:

- Click the **requisition number** to view the status of the order placed.

Here is a summary of the requisition. You can also retrieve this requisition at any time via the document history search page.

Requisition number	1067141 <a href="#">view</a>
Requisition status	Pending
Cart name	2013-12-05 jtest0000 02
Requisition date	12/11/2013
Requisition total	10.00 USD
Number of line items	1

- Click the **PR Approvals** tab to view the status of your requisition.

The screenshot shows the 'PR Approvals' tab selected. The workflow is as follows:

- Submitted: Dave Taylor, 12/6/2013 5:17 PM
- Banner Budget Check: Completed ✓ System
- Capital Approval: Approved ✓ Dave Taylor
- Create PO: Completed ✓
- Completed: 12/6/2013 5:18 PM

- Click the **History** tab to view details of the requisition workflow.

The screenshot shows the 'History' tab selected, displaying a table of workflow events:

Line No	Date/Time	User	Step(s)	Action	Field Name	From	To	Note
	12/6/2013 5:18 PM	System		Requisition approval process completed				
	12/6/2013 5:18 PM	System	Create PO	PO Created	PO#: 16612005			
	12/6/2013 5:18 PM	Dave Taylor	Capital Approval	Requisition approved				
	12/6/2013 5:18 PM	Dave Taylor	Capital Approval	Requisition assigned				
	12/6/2013 5:18 PM	System	Banner Budget Check	Requisition approved				
	12/6/2013 5:17 PM	Dave Taylor		Requisition submitted				
	12/6/2013 5:17 PM	Dave Taylor		Line removed	458110			
Line 1	12/6/2013 5:16 PM	Dave Taylor		New Line added	458110			Punch-out
	12/6/2013 5:15 PM	Dave Taylor		Requisition Copied				Requisition 1067806

- Click the **Requisition** tab and scroll to the bottom right to retrieve the Purchase Order number.

The screenshot shows the 'Requisition' tab selected. The PO Number is highlighted as P0128653. Below this, the 'Product Description' section shows:

Line(s)	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1	Ziploc Double Zipper Bags, 1 Gallon, 1 3/4 mil., Clear, 11 H x 10 1/2 W, 250/Ct	458110	CT	45.44	1 CT	45.44 USD

Summary:

- Supplier subtotal: 45.44USD
- Subtotal: 45.44
- Total: 45.44 USD