

E-Procurement System Tutorial

Punchout Vendors

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

Creating a Purchase Order – Punch-out

When purchasing from a punch-out vendor, you are sent directly to the vendor's website.

- From the Home Screen, click on a Punch-out vendor to start shopping. This will bring you directly to the vendor's site.

The screenshot shows the Pace University e-Procurement Marketplace home page. The page is titled "e-Procurement Marketplace" and includes a navigation bar with "Shop Everything" and "Go" buttons. Below the navigation bar are sections for "Showcase Links", "Showcase Services", and "Showcase Suppliers". A red box highlights the "Punch-out" section, which contains a grid of vendor logos including BH, COWG, CAROLINA, DELL, Fisher Scientific, The University of North Carolina, moonmedical, STAPLES, and YWA.

- Search for desired items on the vendors site.

The screenshot shows the Staples Advantage website. The page displays the customer ID 1063373NYC and the Pace University logo. The main navigation bar includes "Home", "Customer Service", and "Messages(1)". A search bar is visible with the text "Pens" entered. A dropdown menu is open, showing a list of pen categories: black pens, blue pens, red pens, bic pens, gel pens, pilot pens, papermate pens, ink pens, uniball pens, and sharpie pens. The page also features a "Shop By Category" dropdown menu and a "Your Shopping Lists" section.

- Change the desired quantity and click **Add to Cart**.

The screenshot shows the Staples Advantage website interface. At the top, the customer ID is 1063373NYC. The navigation bar includes links for Home, Customer Service, and Messages(1). A shopping cart icon shows 0 items for \$0.00, with a Checkout button. A search bar contains the text 'Pens' and a Search button. Below the search bar, there are navigation tabs for My Orders, My Account, and Ink & Toner Finder. A Quick Order section includes a form with 'Quick Order Item #' and a quantity of '1', an 'Add to Cart' button, and an 'Order Multiple Items' link. A 'Your Shopping Lists' dropdown menu is also visible. The search results section displays 'Your Search for "Pens" returned 2,016 matches.' and includes sorting options (Best Match) and items per page (15). A list of categories is shown on the left, with 'Retractable Ballpoint Pens (245)' selected. The main product listing features a 'Pilot G2® Premium Retractable Gel Ink Rolling Ball Pens, Bold Point, 1.0 mm, Black Ink / Clear Barrel, 12/pk' for \$8.99. The quantity is set to 5, and the 'Add to Cart' button is highlighted with a red box. Other details include 'Pace Contract Best Value', customer item # 648102, staples item # 648102, and MFR item # PIL31256.


- Click **Checkout** in the top right of the screen

This screenshot shows the top portion of the Staples Advantage website. The customer ID remains 1063373NYC. The navigation bar is consistent with the previous screenshot. The shopping cart icon now shows 1 item for \$44.95, and the 'Checkout' button is highlighted with a red box, indicating it is the next step in the process.

- Adjust items in your cart as necessary, then click **Submit** to bring items back into the Pace E-Procurement system for processing.

Your Shopping Cart : Review Item Information

Sort By: Please select

	Item Total	Remove an Item
 <p>Pilot G2® Premium Retractable Gel Ink Rolling Ball Pens, Bold Point, 1.0 mm, Black Ink / Clear Barrel, 12/pk <input checked="" type="checkbox"/> Pace Contract Best Value Customer Item # 648102 Staples Item # 648102 MFR Item # PIL31256</p> <p>Packing Slip Note: <input type="text"/></p>	<p>\$8.99 DZ/12 Qty. <input type="text" value="5"/> Check Delivery Date</p>	<p>\$44.95 <input type="checkbox"/></p>

Sort By: Please select

Order Summary

Subtotal:	\$44.95
Total:	\$44.95

Continue shopping | Clear cart | Update cart | **Submit**

- ✓ If there are additional items that need to be added to the cart, click the **shopping cart** on the left of the screen. Multiple items can be added from as many vendors as desired to the cart. This can be done for hosted and non-catalog vendors as well.
- ✓ If there are items you want to remove from your cart, select the 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 and action on**. Click **Remove Selected Items**. Click **Go**.

Note: unwanted items are deleted.

Continue Shopping | 2 Item(s) for a total of **55.44** USD

Proceed to Checkout or Assign Cart

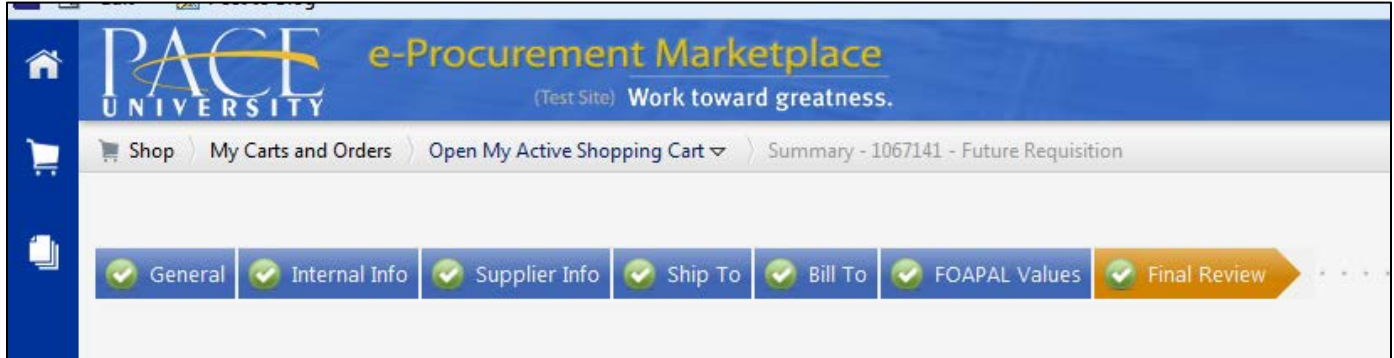
Help | Empty cart | Perform an action on (1 items selected)... | Select All

Unit Price	Quantity	Total
10.00 USD EA	1	10.00 USD <input checked="" type="checkbox"/>

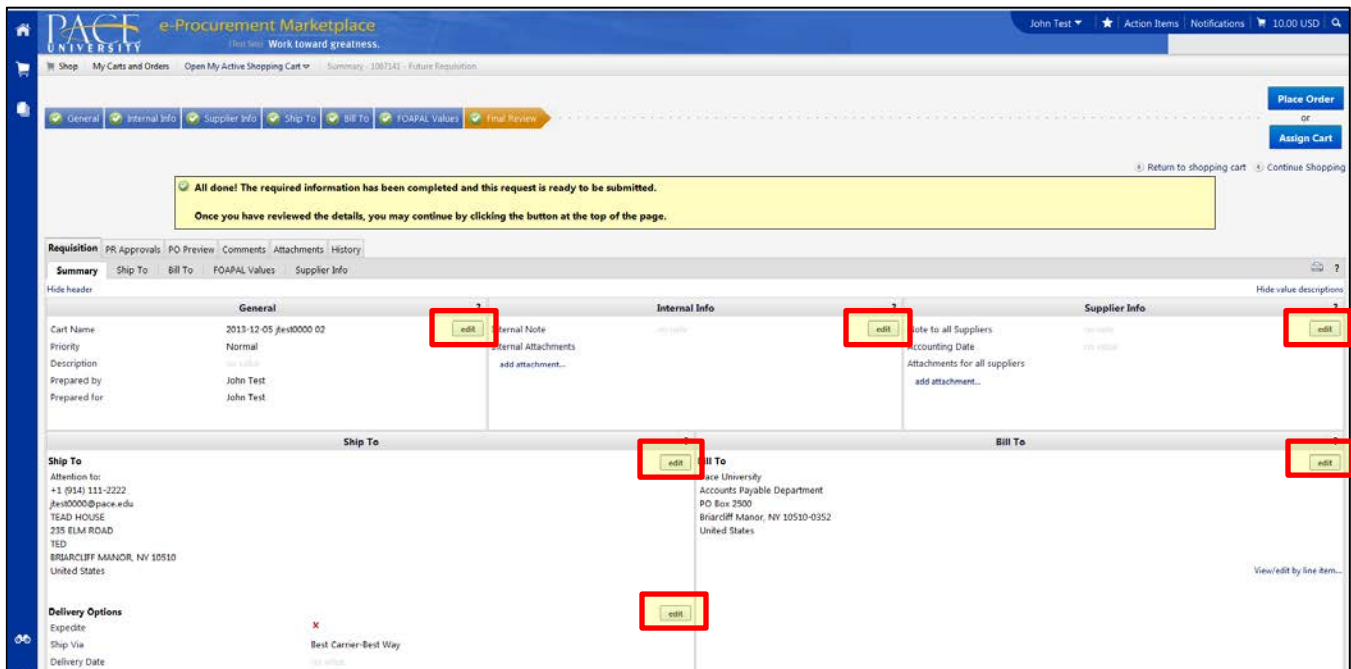
- Once all desired items are in your cart, click **Proceed to Checkout**.

Final Review

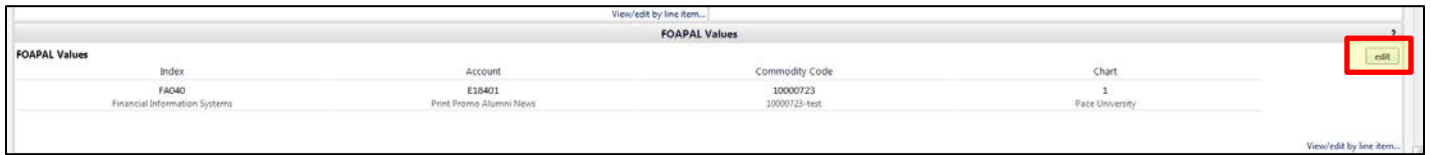
Verify all the information (Ship To, Bill To, FOAPAL Values etc.) is correct before sending the information to the vendor. In this section, the user has the ability to edit the entire document, or each line item individually.



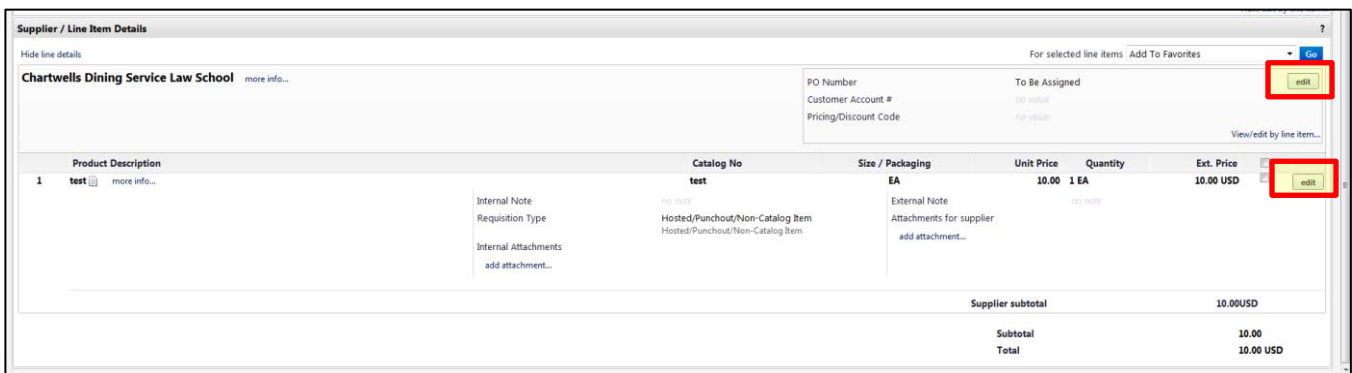
- To adjust the **Summary** information, click **Edit** (located in the upper right of the corresponding box) for the particular section which needs adjusting. After changes have been made, click **Save**.



- 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**.



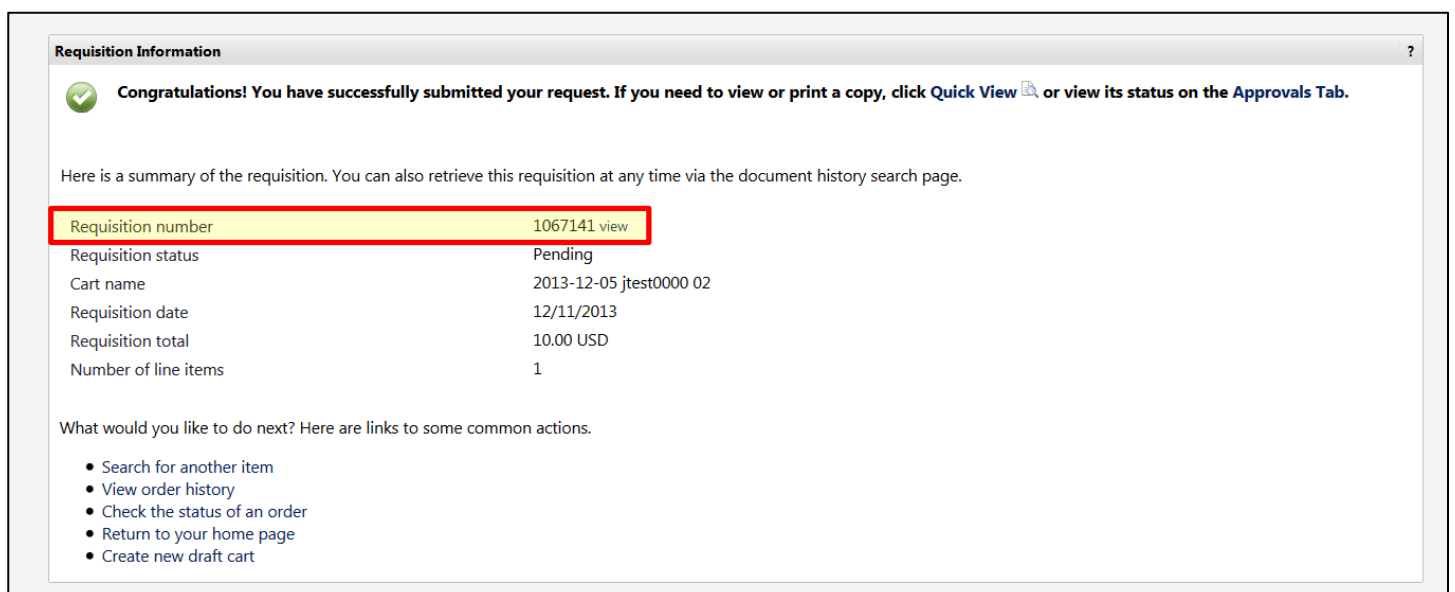
- To adjust **Supplier/Line Item Details**, click **Edit** (located in the upper right of the corresponding box) for the particular item which needs adjusting. After changes have been made, click **Save**.



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



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



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 view
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 9 records:

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 5:17 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**.

PACE UNIVERSITY e-Procurement Marketplace
Work toward greatness.

Delivery Options: Expedite (no bid), Ship Via: Best Carrier-Best Way (no bid), Delivery Date: (no bid)

View/edit by line item...

FOAPAL Values

Index	Account	Commodity Code	Chart
FA040 Financial Information Systems (FIS)	E31801 Cap Bud Future Floor Covering	150 Builder'S Supplies	1 Pace University

View/edit by line item...

Supplier / Line Item Details

Hide line details

For selected line items: Add To Favorites (Go)

Staples more info...

PO Number: **P0128653**

Customer Account: (no bid)

Pricing/Discount Code: (no bid)

View/edit by line item...

The item(s) in this group was retrieved from the supplier's website. What does this mean?
You can no longer access this item(s) on the supplier's website. What does this mean?

Line(s): 1

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 more info...	458110	CT	45.44	1 CT	45.44 USD

Manufacturer Name: Diversey, Inc. Internal Note: (no bid) Supplier Attn To: (no bid)

Manufacturer Part Number: 94602 Requisition Type: Hosted/Punchout/Non-Catalog Item External Note: (no bid)

Supplier Part Auxiliary ID: (no bid) Internal Attachments: Attachments for supplier

Supplier subtotal: 45.44USD

Subtotal: 45.44

Total: 45.44 USD