

E-Procurement System Tutorial

Verifying your Profile Information

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

Accessing E-Procurement

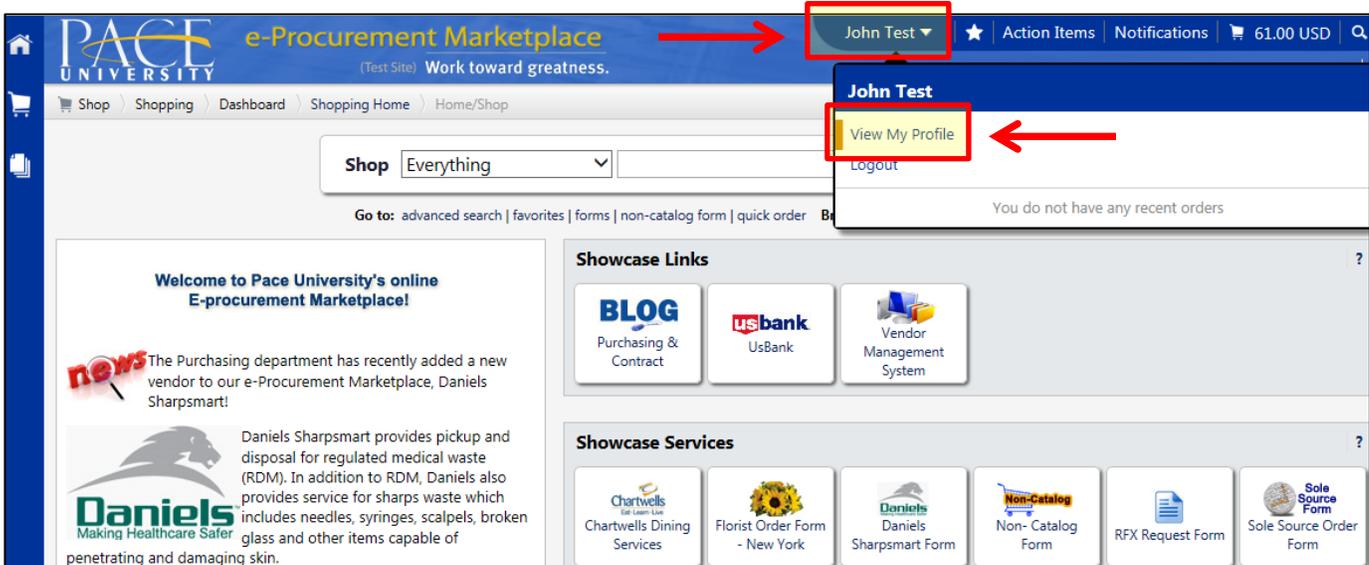
Log on to MyPace Portal, click the **Staff** tab and click **E-Procurement**. (To get E-Procurement access, a request is made on the DoIt Help Desk with your Budget Rep.'s approval).

Your username must be in all lower case letters



Verifying User Profile - User Identification

- Click your name → **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**.

The first screenshot shows the 'My Profile' page for user John Test (jtest0000). The 'User Information and Settings' link is highlighted with a red box and a red arrow pointing to it.

The second screenshot shows the 'User's Name, Phone Number, Email, etc.' form. The fields are filled with the following information:

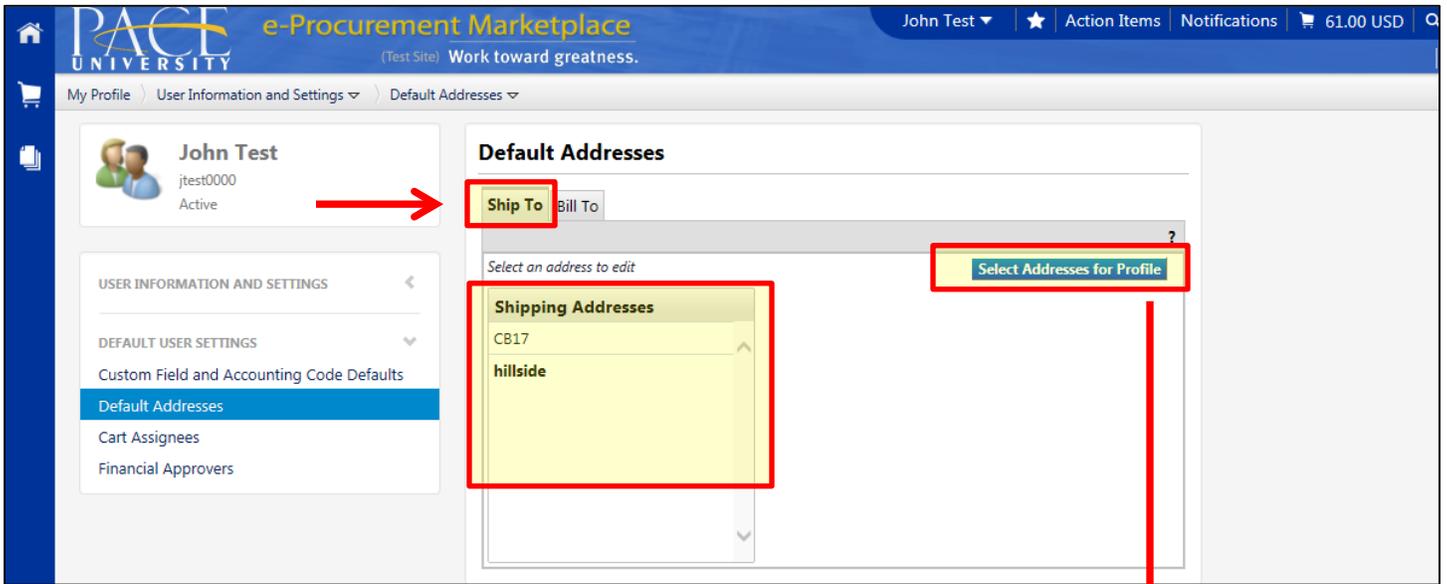
First Name	John	✓
Last Name	Test	✓
Phone No.	1 914 1112222 +1 (914) 111-2222	✓
User E-mail	jtest0000@pace.edu	Email User ✓
User Division	Finance and Planning (Finance and Planning)	
User Position	Standard Requisitioner	
User Name	jtest0000	
Question		
Authentication Method	Local	

The 'Save' button at the bottom right of the form is highlighted with a red box and a red arrow pointing to it.

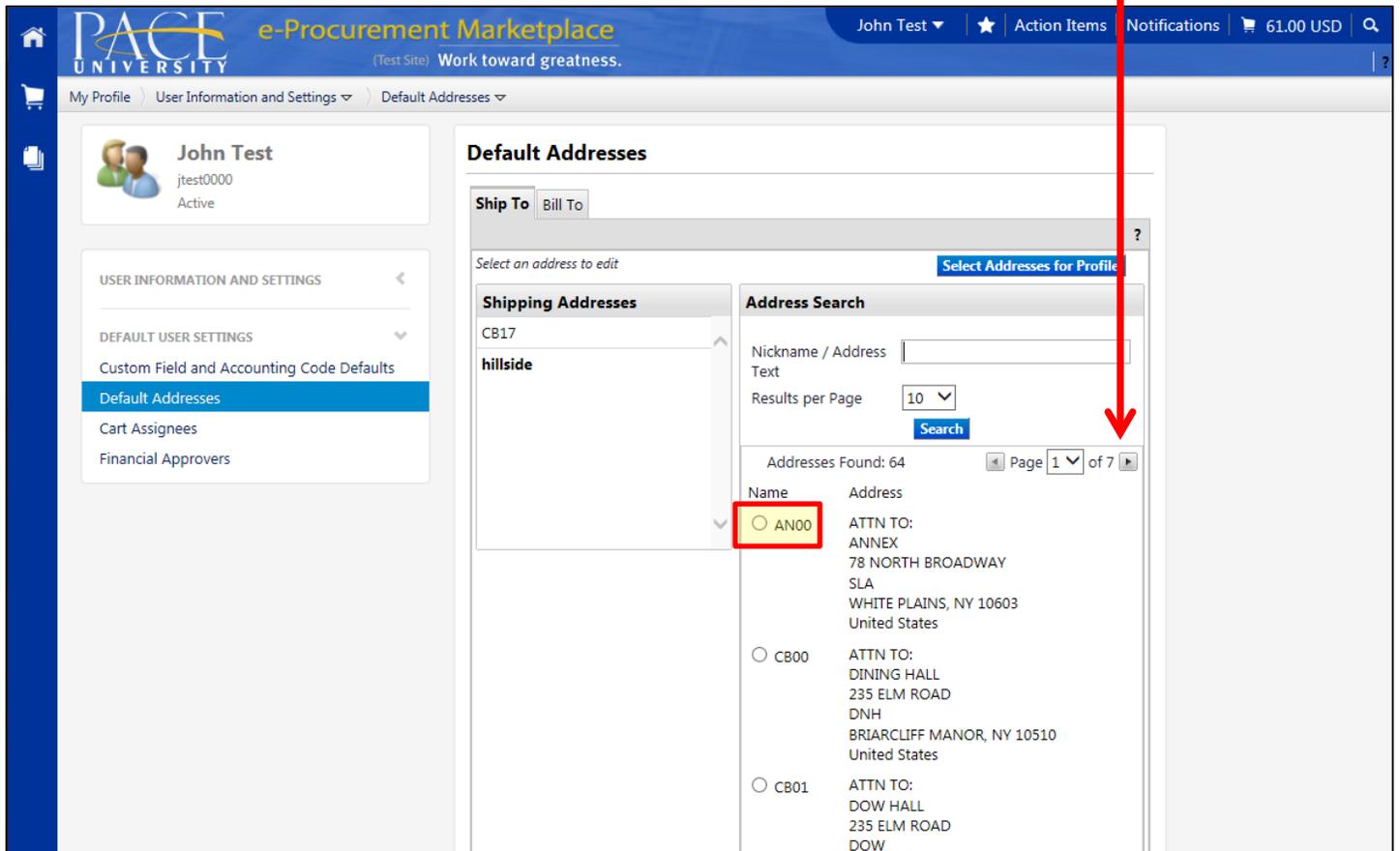
Verifying User Profile - Shipping Address

- Click **User Information and Settings**.
- Click **Default Addresses**.
- Click the **Ship To** tab

The screenshot shows the 'User Information and Settings' page. The 'User Information and Settings' link in the left sidebar is highlighted with a red box. The 'Default User Settings' section is expanded, and the 'Default Addresses' link is highlighted with a red box and a red arrow pointing to it.



- Click the **Ship To** tab to select the Ship To address. Click the **Select Addresses for Profile** button, then click on the **Search** button to display the Ship To address in your profile.
- Click the **radio button** corresponding to the address in which the user is located.



➤ In the **Nickname** field, type the name to be given to this address. Otherwise, leave the code that populates.

➤ Click the **Default** box for the address most frequently shipped to.

➤ In the **Attn** field type the name of the person who deliveries are sent to.

➤ Enter Room #

➤ Click **Save** to save changes

Note: The user will see the Nickname appear to the left in the Shipping Addresses selection box.

Note: The default address will appear on the list in **Bold**.

- 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**, highlight it on the left-hand side of the screen. Click **Delete Address**.

Verifying User Profile - Billing Address

- Click the **Bill To** tab
- Click **Select Addresses for Profile**

Note: There is only one Bill To address for Pace University

PACE UNIVERSITY e-Procurement Marketplace
John Test | Action Items | Notifications | 61.00 USD

My Profile > User Information and Settings > Default Addresses

John Test
jtest0000
Active

USER INFORMATION AND SETTINGS
DEFAULT USER SETTINGS
Custom Field and Accounting Code Defaults
Default Addresses
Cart Assignees
Financial Approvers

Default Addresses

No addresses defined in profile.

Ship To: **Bill To**

Select an address to edit: No addresses defined in profile.

Select Addresses for Profile

Billing Addresses

Default Addresses

No addresses defined in profile.

Ship To: **Bill To**

Select an address to edit: No addresses defined in profile.

Select Addresses for Profile

Billing Addresses

Select Address Template: **Bill To**

1

Select **Bill To** from the drop down menu

Default Addresses

No addresses defined in profile.

Ship To: **Bill To**

Select an address to edit: No addresses defined in profile.

for Profile **Delete Address**

Billing Addresses

Edit Selected Address

Nickname: **Bill To**

Default:

Current Default Address: ---

ADDRESS

Address Line 1: Pace University
Address Line 2: Accounts Payable Department
Address Line 3: PO Box 2500
City: Briarcliff Manor
State/Province: NY
Postal Code: 10510-0352
Country: United States

Save

2

Click default check box

Click **Save** to save for future uses

Default Addresses

Changes Saved

Ship To: **Bill To**

Select an address to edit: **Bill To**

Select Addresses for Profile **Delete Address**

Billing Addresses

Bill To

Edit Selected Address

Nickname: **Bill To**

Default:

Current Default Address: **Bill To**

ADDRESS

Address Line 1: Pace University
Address Line 2: Accounts Payable Department
Address Line 3: PO Box 2500
City: Briarcliff Manor
State/Province: NY
Postal Code: 10510-0352
Country: United States

Save

3

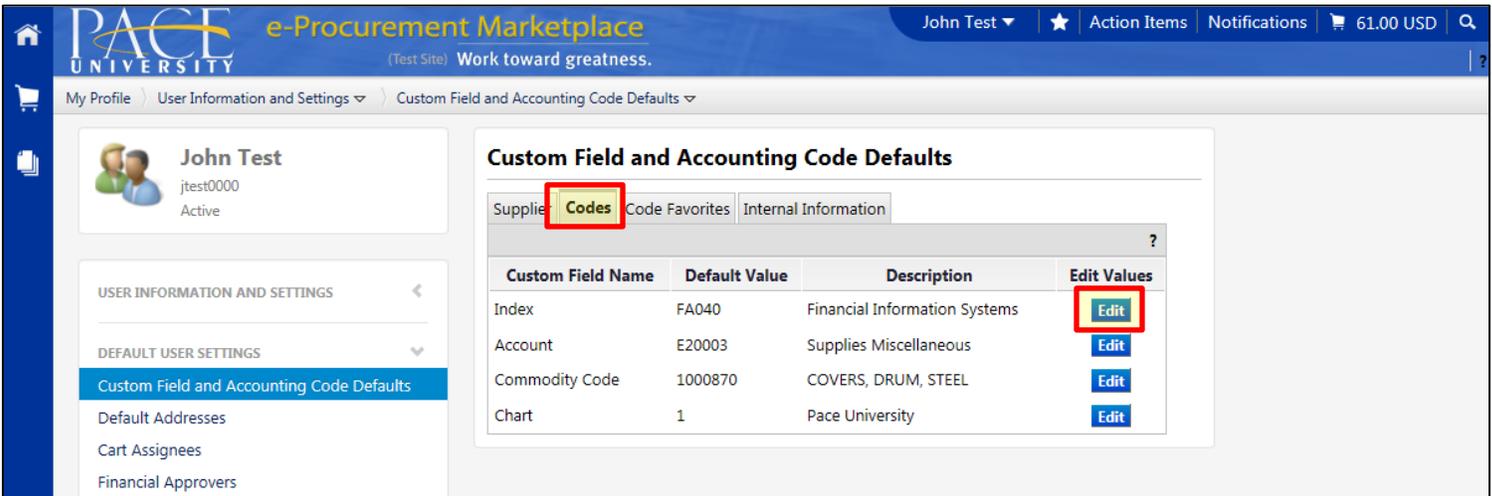
Bill to will save to the list under Billing Addresses

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.

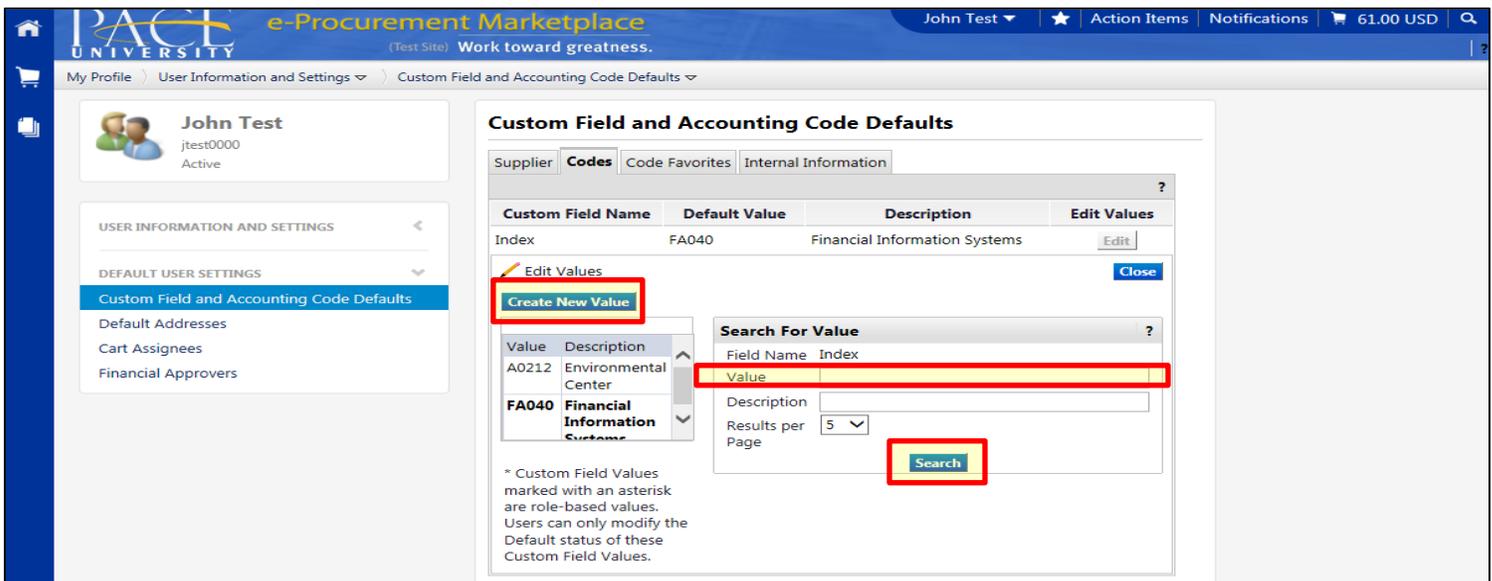
- Click the **User Information and Settings** Section
- Click **Custom Field and Accounting Code Defaults** Section



- Click the **Codes** tab
- Then click the **Edit** button in the **Index** row.



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



- Check select box and click **Add Values** to add to profile

Custom Field and Accounting Code Defaults

Supplier **Codes** Code Favorites Internal Information

Custom Field Name	Default Value	Description	Edit Values
Index	FA040	Financial Information Systems	Edit

[Edit Values](#) [Close](#)

[Create New Value](#)

Value	Description
A0212	Environmental Center
FA040	Financial Information Systems

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

Results per page 5 **Found 477** Page 1 of 96

Select	Value	Description
<input type="checkbox"/>	A0001	Office of the Dean Dyson College
<input type="checkbox"/>	A0002	Society of Fellows-Dyson Coll
<input checked="" type="checkbox"/>	A0003	Scholarly Research Dyson
<input type="checkbox"/>	A0004	Ctr of Community Action and Rsrch
<input type="checkbox"/>	A0005	Writing Center

[Add Values](#) [Back to Search](#)

Results per page 5 Page 1 of 96

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

Custom Field and Accounting Code Defaults

Supplier **Codes** Code Favorites Internal Information

Custom Field Name	Default Value	Description	Edit Values
Index	FA040	Financial Information Systems	Edit
Account	E19602	Supplies General Office	Edit
Commodity Code	655	Photographic Equipment And Supplies (Not Including	Edit
Chart	1	Pace University	Edit

➤ Click **Edit** to choose a default value for Account, Commodity Code and Chart.

Note: Chart should always be defaulted to “1-Pace University”

My Profile > User Information and Settings > Custom Field and Accounting Code Defaults >

John Test
jtest0000
Active

USER INFORMATION AND SETTINGS <

DEFAULT USER SETTINGS >

Custom Field and Accounting Code Defaults

Default Addresses

Cart Assignees

Financial Approvers

Custom Field and Accounting Code Defaults

Supplier Codes Code Favorites Internal Information ?

Custom Field Name	Default Value	Description	Edit Values
Index	FA040	Financial Information Systems	Edit
Account	E19602	Supplies General Office	Edit
Commodity Code	655	Photographic Equipment And Supplies (Not Including)	Edit
Chart	1	Pace University	Edit

Custom Field and Accounting Code Defaults

Supplier Codes Code Favorites Internal Information ?

Custom Field Name	Default Value	Description	Edit Values
Account	E19602	Supplies General Office	Edit

Edit Values Close

Create New Value

Value	Description
E15700	Grad Asst Tuition Remission
E17999	Unapplied Payroll Expense

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

Edit Existing Value ?

Value: E19602

Description: Supplies General Office

Default:

Status: active

Save Remove

Custom Field and Accounting Code Defaults

Supplier Codes Code Favorites Internal Information ?

Custom Field Name	Default Value	Description	Edit Values
Commodity Code	655	Photographic Equipment And Supplies (Not Including)	Edit

Edit Values Close

Create New Value

Value	Description
10	Acoustical Tile, Insulating Materials, And Supplie
100	Barrels, Drums, Kegs, And

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

Edit Existing Value ?

Value: 655

Description: Photographic Equipment And Supplies (

Default:

Status: active

Save Remove

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