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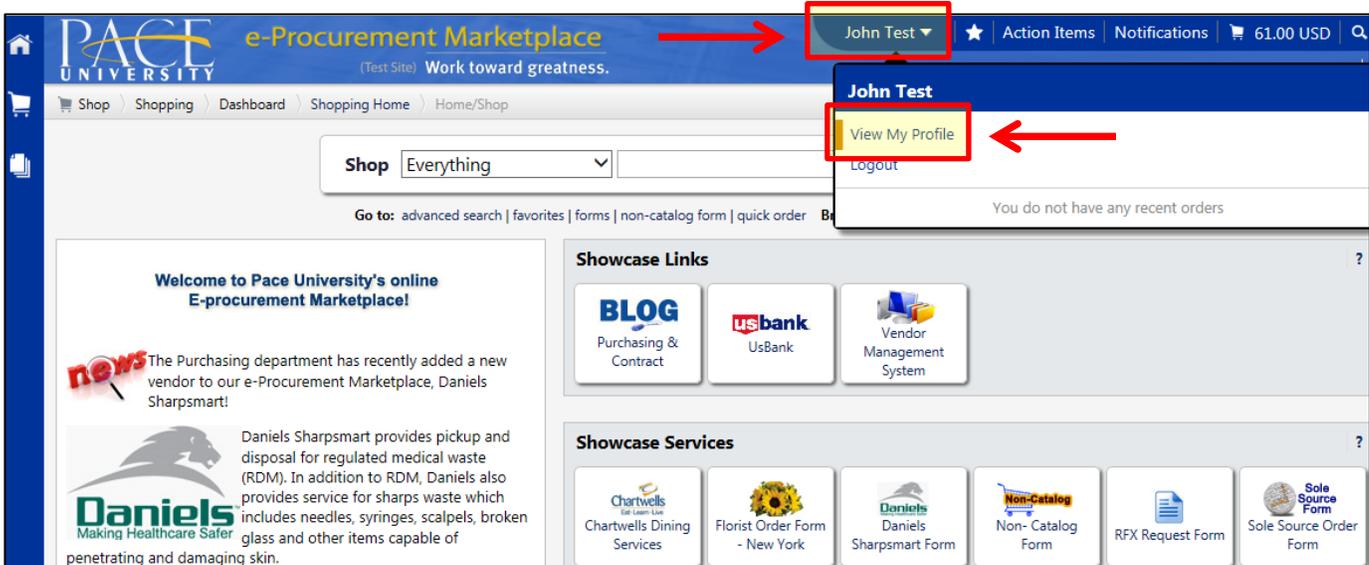
➢ Verify that the information contained in the **User's Name, Phone Number, Email, etc.** section is correct. Make any necessary changes and click **Save.**


Verifying User Profile - Shipping Address
➢ Click **User Information and Settings.**
➢ Click **Default Addresses.**
➢ Click the **Ship To** tab

➢ 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.
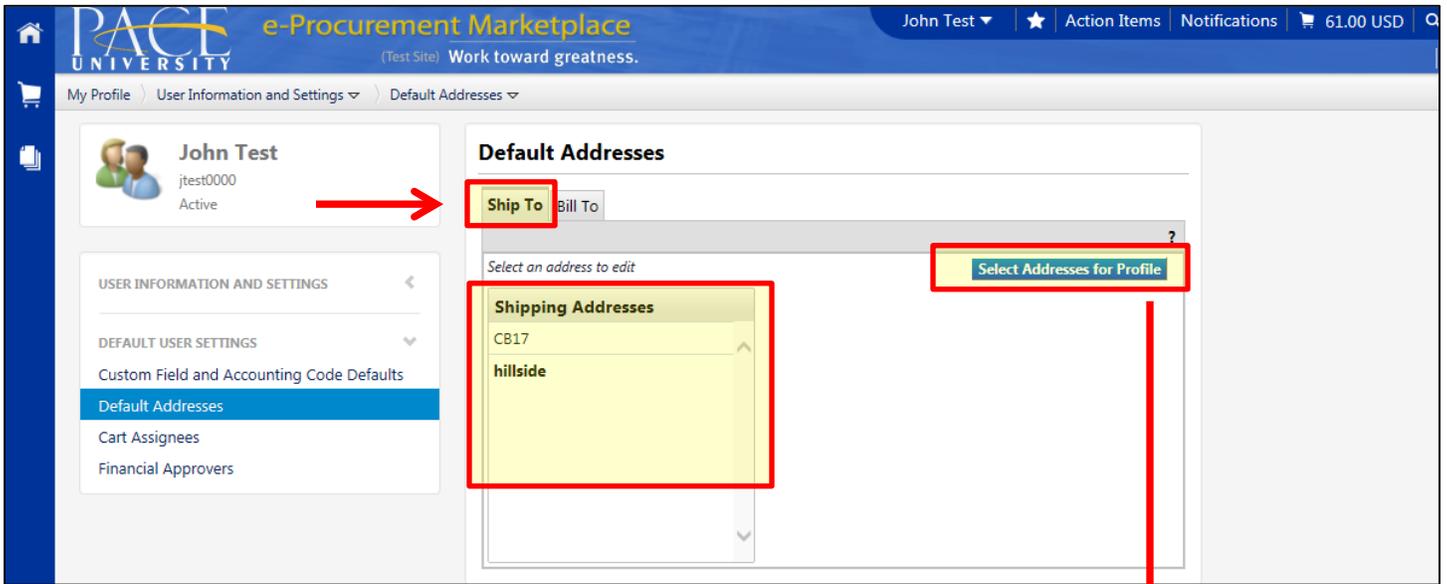
➢ Click the **radio button** corresponding to the address in which the user is located.
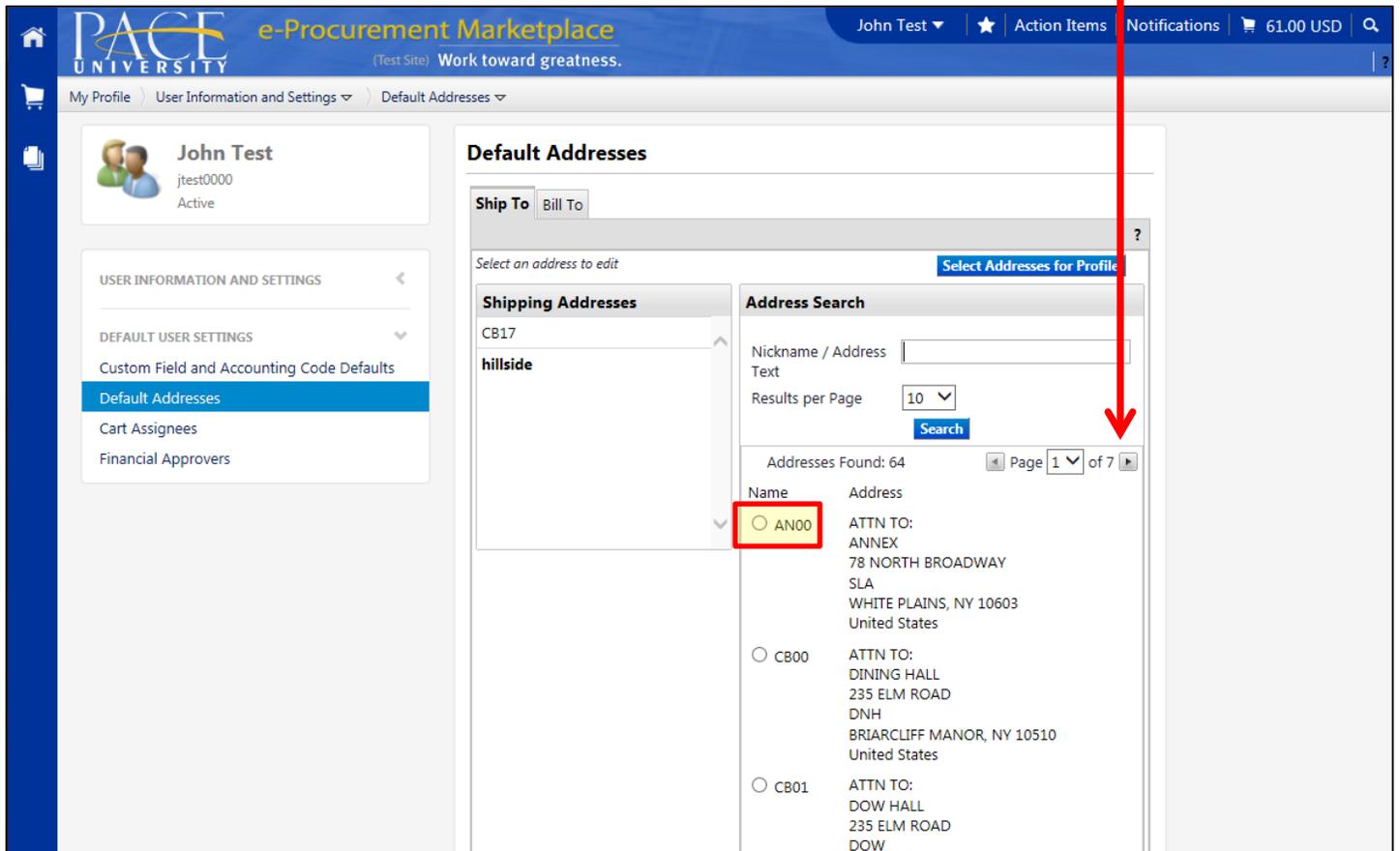
➢ In the **Nickname** field, type the name to be given to this address. Otherwise, leave the code that populates.

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

61.00 USD

PACE UNIVERSITY
e-Procurement Marketplace
(Test Site) **Work toward greatness.**

My Profile ⟩ User Information and Settings ▽ ⟩ Default Addresses ▽

John Test
jtest0000
Active

Default Addresses

Ship To Bill To

Select an address to edit   Select Addresses f...   Delete Address

Shipping Addresses   **Edit Selected Address**

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

➢ Enter Room #

➢ Click **Save** to save changes

CB17
hillside

Nickname   AN00   ×
Default   ☑

Current Default   hillside
Address

A D D R E S S
Attn: ATTN TO:
Room:
Address 1   ANNEX
Address 2   78 NORTH BROADWAY
Building   SLA
City   WHITE PLAINS
State/Province   NY
Postal Code   10603
Country   United States
                  Save

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

PACE UNIVERSITY
e-Procurement Marketplace
(Test Site) **Work toward greatness.**   John Test ▼ ★ Action Items Notifications 🛒 61.00 USD

My Profile ⟩ User Information and Settings ▽ ⟩ Default Addresses ▽

John T...   ...t Addresses
jtest...
Ac...

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

Changes Saved

USER INFORMATION A...   ...ddress to edit   Select Addresses for Profile   Delete Address

DEFAULT USER SETTINGS   ▽
Custom Field and Accounting Code Defaults   Shipping Addresses   **Edit Selected Address**
Default Addresses
Cart Assignees   **AN00**   Nickname   AN00
Financial Approvers   CB17   Default   ☑
                                 hillside   Current Default   AN00
                                                            Address
                                                            A D D R E S S
                                                            Attn: ATTN TO:
                                                            Room:
                                                            Address 1   ANNEX
                                                            Address 2   78 NORTH BROADWAY
                                                            Building   SLA
                                                            City   WHITE PLAINS
                                                            State/Province   NY
                                                            Postal Code   10603
                                                            Country   United States
                                                                              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**, 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

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

Click default check box

Click **Save** to save for future uses

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**.
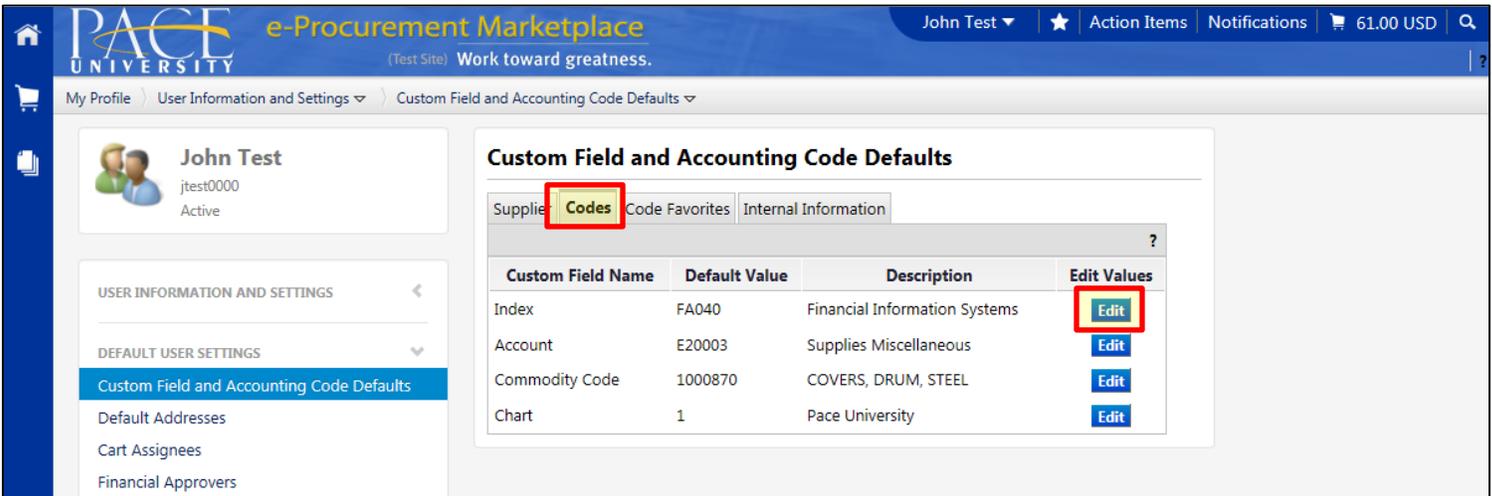
  ➢ Click **Create New Value**, enter the Index to be added in the **Value** field and click **Search**
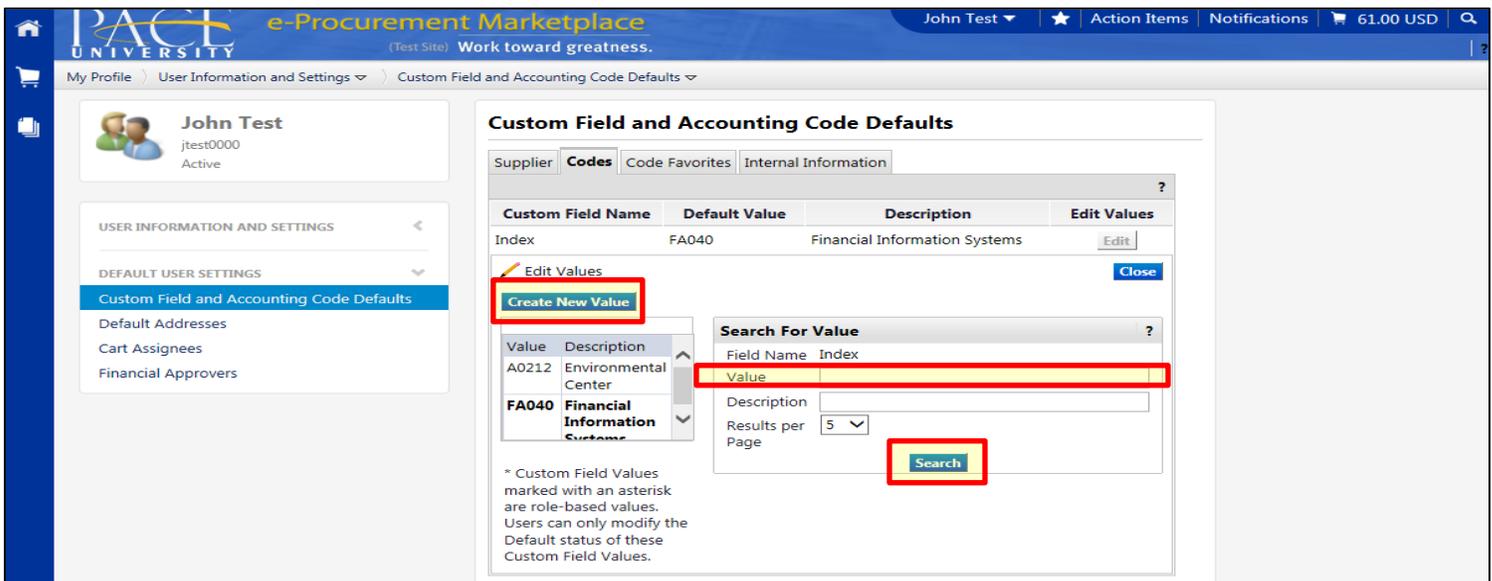
➢ Check select box and click **Add Values** to add to profile

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

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

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.