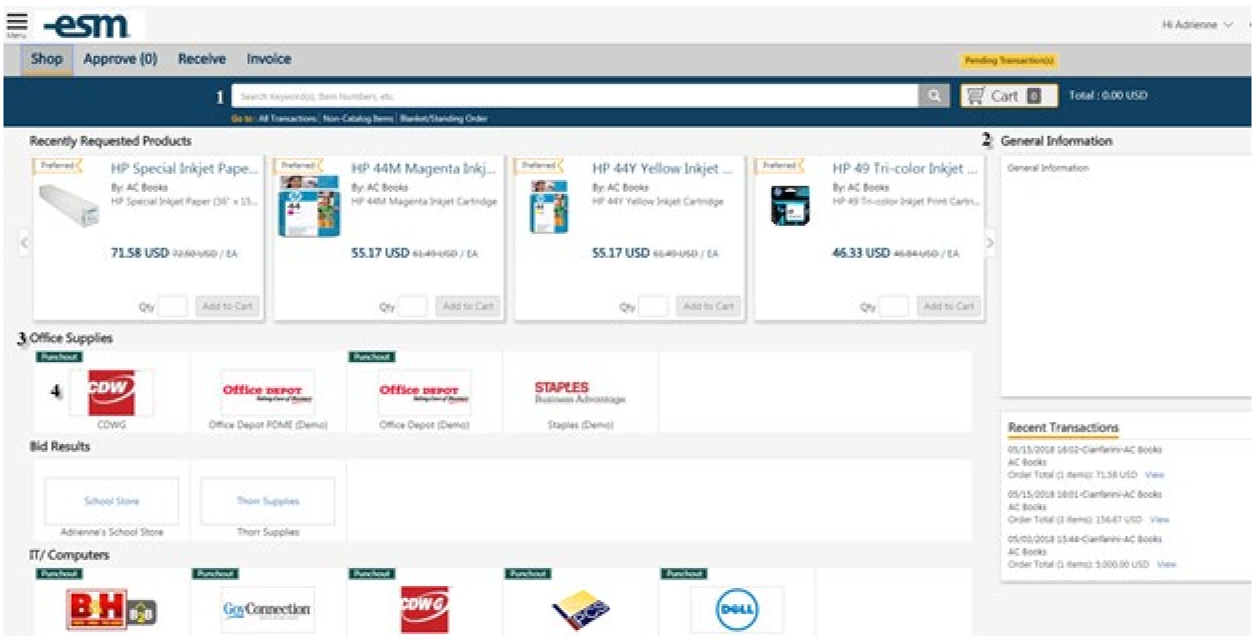
ESM Purchase: Requester Reference Quick Guide

Shop

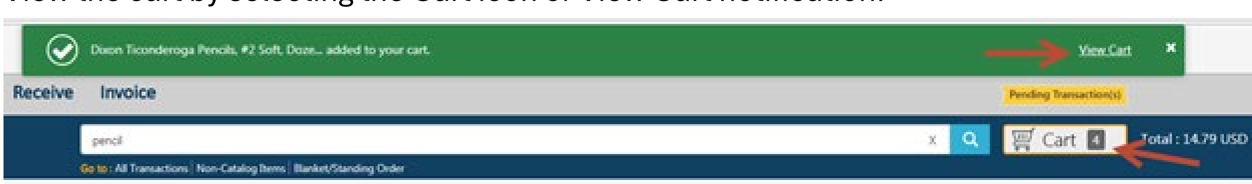
Requesters can select items from assigned catalogs, categorized as:

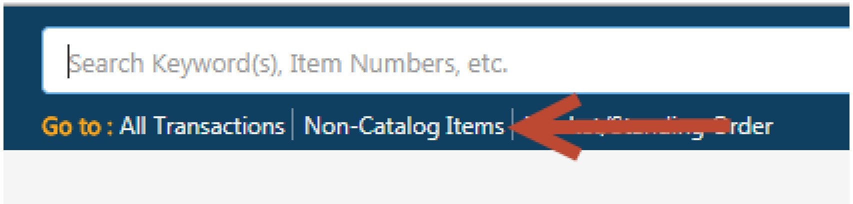
- **Punch-Out Catalogs**: Open a customized version of the supplier's website.



Key Features

- **Search Items**: Locate items from assigned catalogs.
- **Filter By**: Narrow shopping results.
- **Qty**: Enter the desired quantity.
- **Add to Cart**: Add selected items to the cart.
- After adding items to the cart,
    - Requesters can: Continue Shopping.
    - View the cart by selecting the Cart icon or View Cart notification.

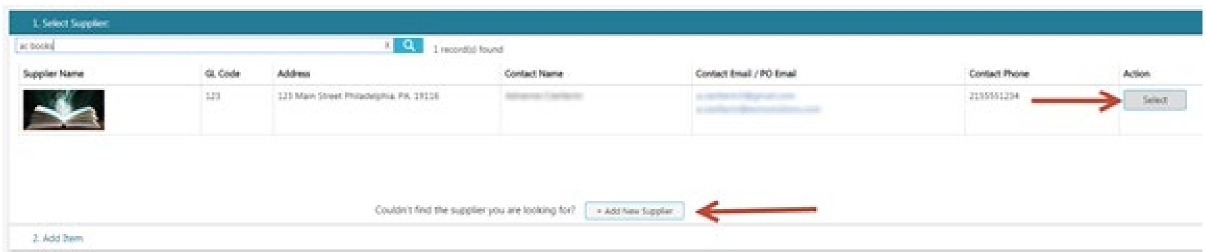




Non-Catalog Item

To create a Non-Catalog Item:

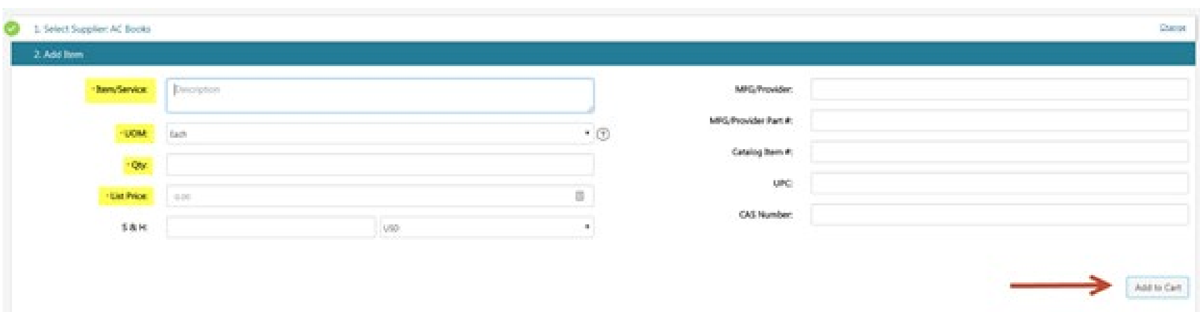
1. Select the **Non-Catalog** option under the Search Bar.
2. Search for the vendor you wish to order.



   a. If the vendor is not in the system contact the vendor and request, they fill out the Procurement New Vendor Form and supply their W-9.

   b. Then email these to **Patricia Bontempo** **pbontemp@kean.edu** to request a new vendor setup. **It takes 24 hours for the vendor to appear in ESM**

3. Enter required fields: Item/Service, UOM, Qty, and List Price.



4. Add the item to the cart.

Cart

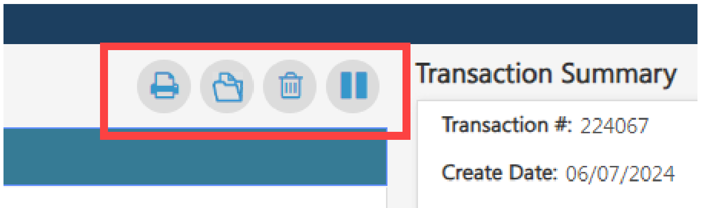
In the cart:

- Edit quantities or delete items.
- Convert the cart to transactions by selecting **Checkout**. Multiple transactions are created if items are from different suppliers.

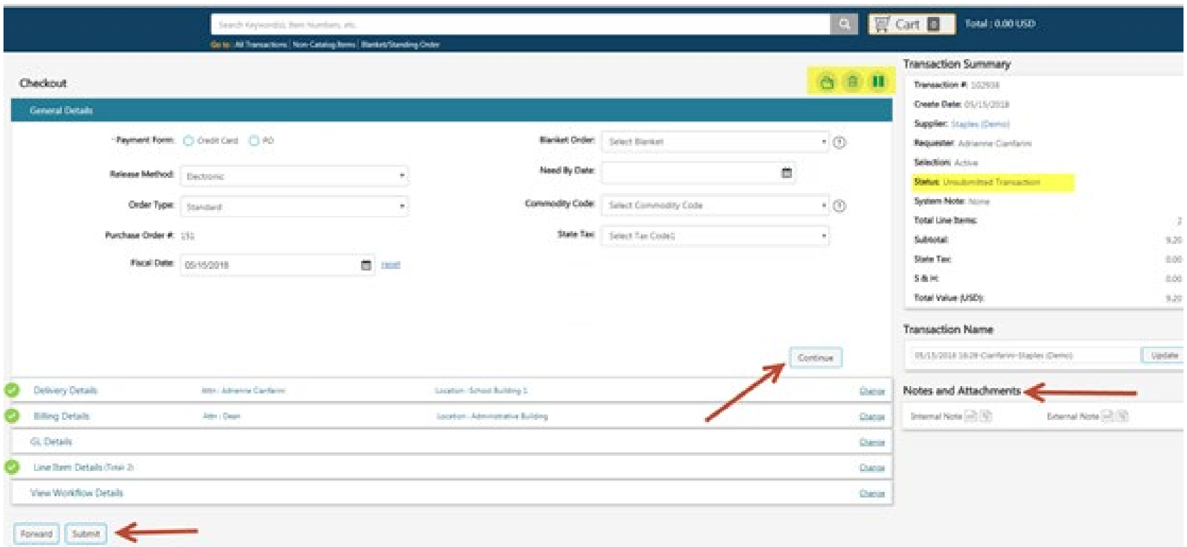
Checkout

- Add items to transactions (if from the same supplier).

- Complete the Checkout sections and select **Continue** to save details.

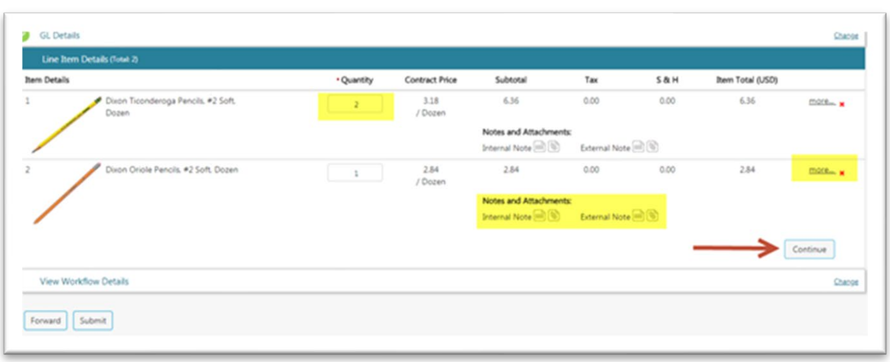


Actions in Checkout



- Print, Archive, Delete, or Put on Hold transactions.
- Confirm/modify Bill-to and Ship-to locations.
- Assign GL codes and split amounts by percentage.
- Validate and submit transactions for approval or release to suppliers.

Note: Notes and attachments can be internal (users) or external (suppliers).



All Transactions

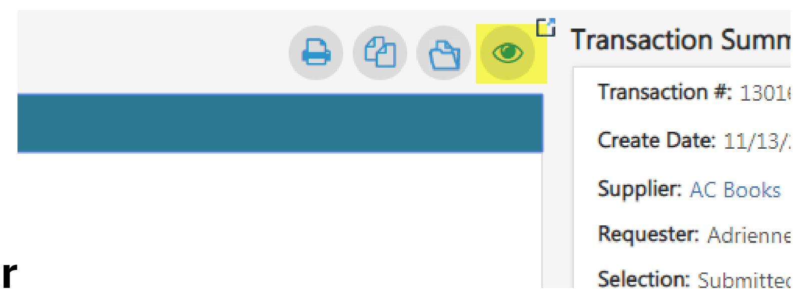
Track progress or review transactions:

- **Statuses**: Include Unsubmitted, Pending Approval, Pending Release, and more.
- Access using filters such as Active, Waiting, Hold, Archive, or Submitted.

Search Capabilities in All Transactions

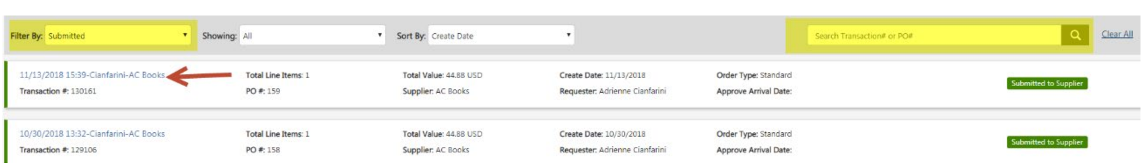
Use filters and sort options to find transactions:

- **Filters**: Filter by user/system actions or statuses.
- **Sort By**: Sort transactions by Account #, Create Date, Supplier, etc.
- **Search Bar**: Locate specific transactions using their number.



View Order

- Select the **View Order** icon under All Transactions or Approve/Manage screens.
- View the System Note History for release details.



Blanket Purchase Orders and Standing Orders

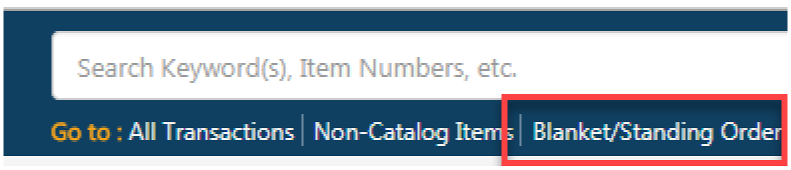
Overview

Blanket Purchase Orders keep transactions created with the BPO along with the notifications based on value and end date that you created.

Standing Order functionality allows for tracking of invoices against a supplier agreement or contract. Once a standing order has reached its expiration date, or its value has been exhausted, no additional invoices can be created against it.

A standing order will encumber funds upfront during the creation process using the specified account codes.

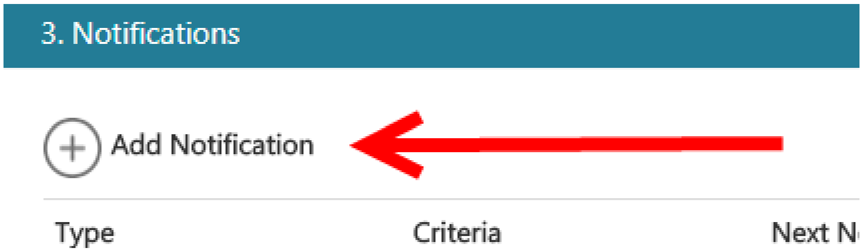
Creating a Blanket or Standing Purchase Order



1. Click the **Blanket/Standing Order** link. The you can click the **New Order** button to create a new BPO/SPO. Existing orders show in the All Orders Area. To view an existing SPO/BPO, click in the order number.
2. Search for the supplier and use the **Select** button to choose.
3. Complete the General Details box.

   a. The BPO required fields are Order Classification, Order ID, Start Date, and Total Order Value. The user can choose to enter an Order Description and/or Expiration Date. Select **Continue** to progress to the next step.
   b. The SPO required fields are Order Classification, Order Number, Order Description, Start Date, and Total Order Value. The SPO also allows for a Fiscal Date entry for encumbering. Select **Continue** to progress to the next step.

4. Users can create Notifications based on the Order Value and Expiration date. Select the **Add Notification** button.

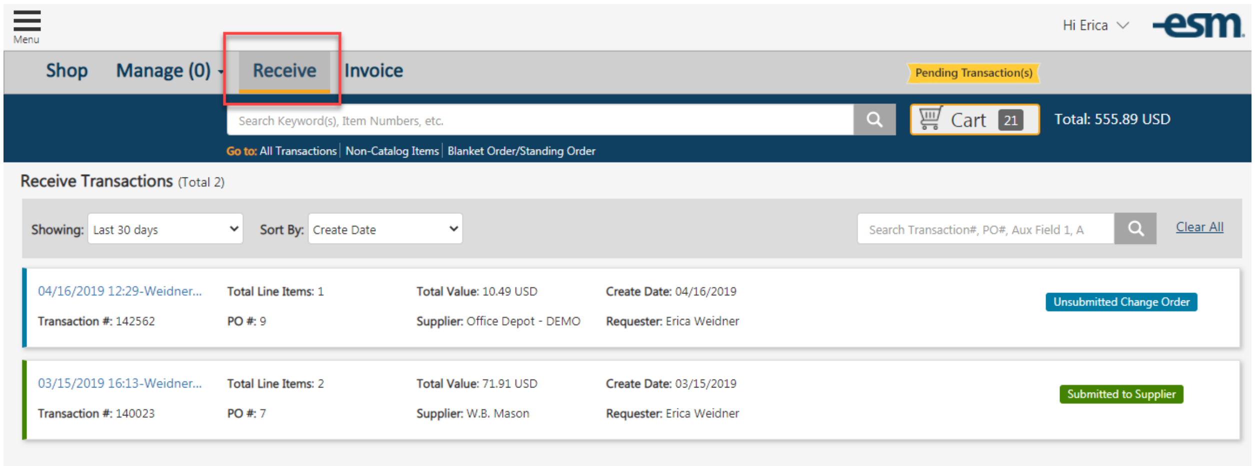


    a. To create an Order-Value-based notification, enter the Basis (dollar or percentage of amount remaining) and users to notify. The search bar below allows the creator to select the users. Select **Update** before exiting the pop-up window to save the notification.
    b. To create an Expiration-based notification, enter the number of Days and search for users to notify using the search bar. The Next Notification date will auto-generate after entering the days above. Select **Update** before exiting the pop-up window to save the notification.
5. Select **Continue** to proceed to the next step.
6. BPO/SPO Creators can associate attachments with the BPO/SPO record. To add or edit attachments, select **Manage Attachments**.
7. Select **Continue** to proceed. If a new BPO/SPO was created, the user will return to the BPO/SPO Page, showing the new order.
8. After adding items to the cart from the Supplier associated with the BPO, proceed to Checkout. Select the appropriate BPO from the dropdown menu under General Details.
9. The transaction can be submitted for approval

Receive Process

Review Items

The Receiver can select the **Review** button to see open items.



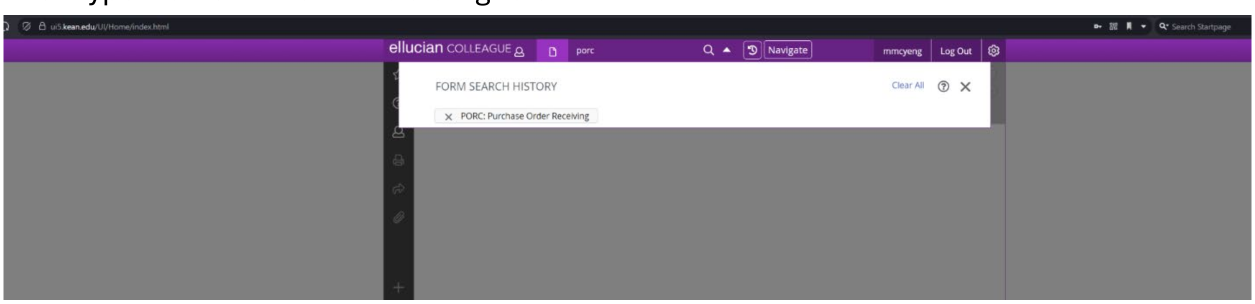
Current Receiving

This process will change in the future to receive in ESM. These instructions are included for those that may have this access already.

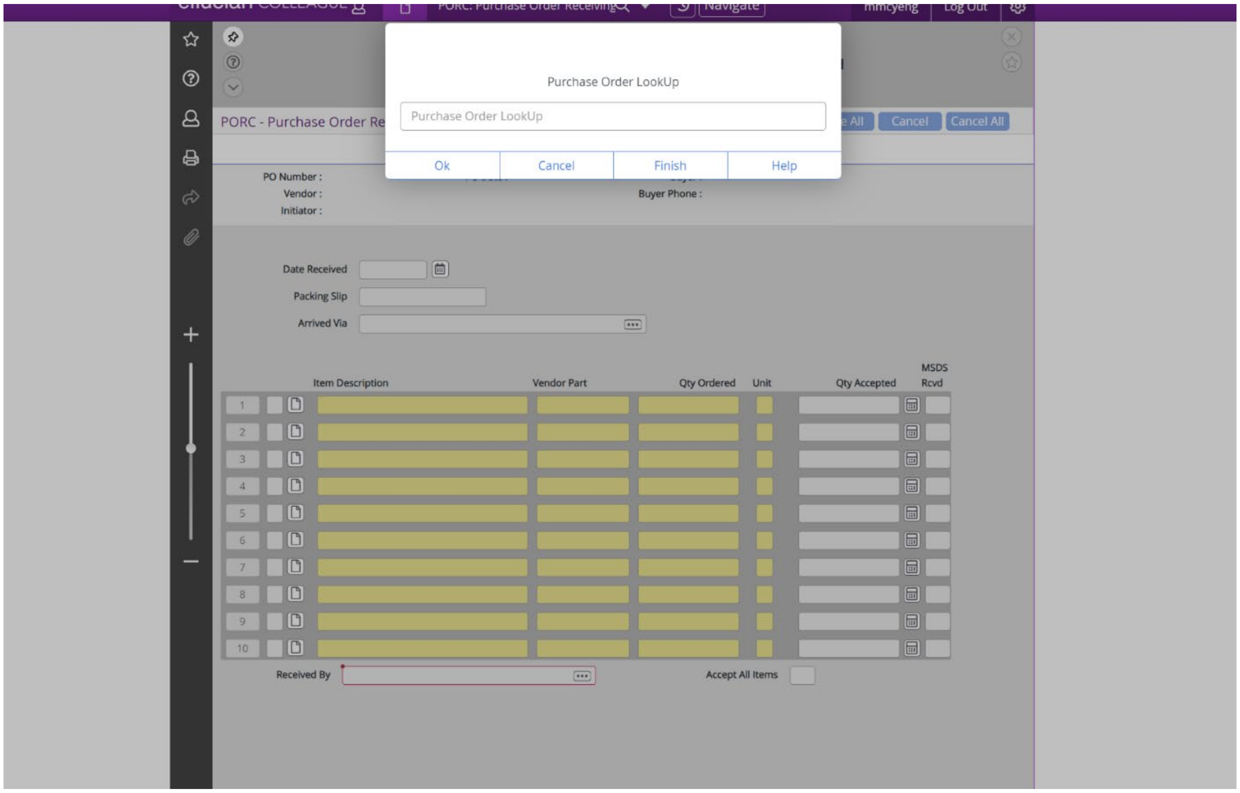
After all, transactions are made and received in Ellucian Colleague.

Log in to Colleague

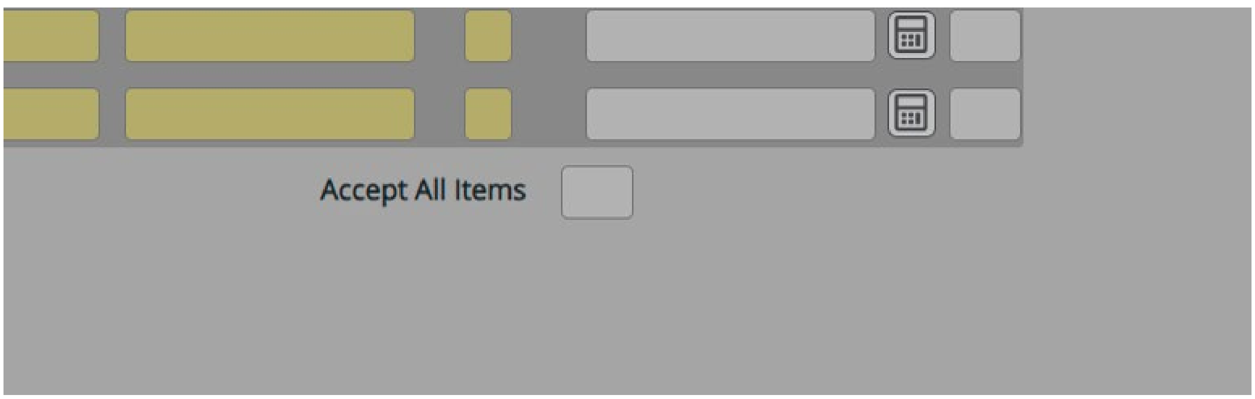
Then type **PORC** in the forms dialogue box



Enter the PO number with the leading P in the Puchard Order Lookup box.



Enter Y in the Accept all items. Press enter, on your keyboard. **Click save all to close.**

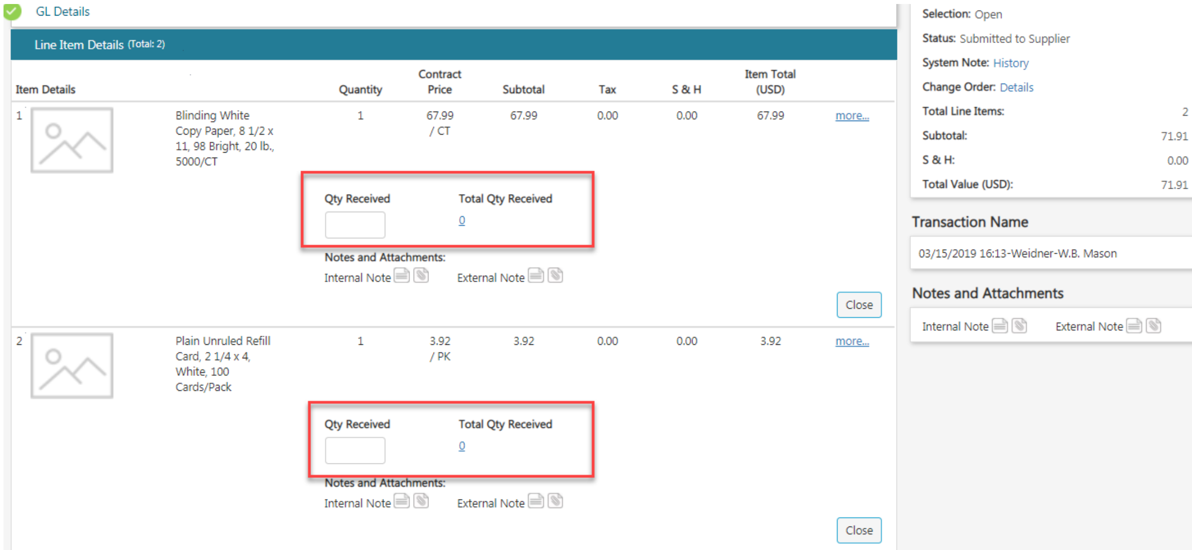


Finally, email acctspay@kean.edu a copy of the PO and invoice for payment to the vendor. Make sure the subject line to accounts payable has the PO number, Vendor Name

Receiving Items (This function is not currently available)

Items can be received via Qty Received or Dollars Received. The receiving options are based on your entity/user configuration.

- The Receiver will enter the Quantity/Dollar Amount and select **Update**. Items may allow for over-receipts based on the entity configuration.



Note: The Receiver can either see all orders within the entity or only their orders based on user configuration.

Closing Items

Items can be closed by selecting **Close Order** in the dropdown menu and selecting the **Close** button. The system allows the Receiver to close without the full receipt.

- The Receiver will confirm if they want to close the order.

Re-Open Order

After the order is closed, it can be re-opened by selecting the **Open** button. The Receiver also has the option to **View the Order** in the dropdown menu.