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.

	leceive Invoice			Pending Transaction()	_
	1 Search Repeated (1), Search	Numbers, etc. - Cetalog Rema [®] Barliet/Standing Order		Cart 🔯 Total : 0.00 USD	
lecently Requested Product		-Caladog Server, Barrier(1)landing Crider		2 General Information	
By AC Books	nkjet Pape Paper (36° × 15 60460 / EA	HP 44M Magenta Inkj By AC Bools HP 44M Magenta Inajet Cartridge 55.17 USD 6649-050 / EA	Man By AC Books	HP 49 Tri-color Inkjet Br A5 boss HP 49 To-color Josef Proc Carps. 46.33 USD 4644400 / EA.	
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Hice Supplies		Parchase			
4 COW	Office paper	Office paper	STAPLES		
CDWG	Office Depot PDMI (Demo)	Office Depot (Demo)	Buainaos Achrosotago Staples (Demo)	Recent Transactions	
id Results				05/15/0508 3402-Cambrin-AC 80 AC 805ks Onder Total (3 Remot 71:58 USD	
	Their Supplies			05/15/0008 0001-Clambers-AC 80 AC 8004s Order Tetral (Literes) 15647 USD	soko
School Stave	andre believes			05/03/0018 13:44-Cardwin-AC 80	
School Stars Advance's School Store / Computers	Thorr Supplee	E-COLOR I	Purchad Purchast	AC Books Order Total (3, Berris: 1,000,00 US2	1 Mater

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.
 - \circ $\,$ View the cart by selecting the Cart icon or View Cart notification.

Dason Ticonderoga Pencils, #2 Soft, Doze added to your cart.		an ×
Receive Invoice	Pending Transaction)	
pend	x 🔍 🛒 Cart 🖪	Total : 14.79 US
Ge to : All Transactions Non-Catalog Items Illanket/Standing Order		



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.

: Booka		K Q 1 record	d found			
kupplier Name	Gl. Code	Address	Contact Name	Contact Email / PO Email	Contact Phone	Action
*	123	123 Main Street Philadeghia PA 19156	Antonio Carlleni	a select dependence of	2155351254	-> Select

- **a.** If the vendor is not in the system contact the vendor and request, they fill out the <u>Procurement New Vendor Form</u> and supply their W-9.
- **b.** Then email these to **Patricia Bontempo <u>pbontemp@kean.edu</u>** 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.

- herry/Service:	Description			MPG/Provider:	
-UOM:	line.		• •	MPG/Provider Part #:	
	Later -		.0	Catalog Item #;	
·Qtv:				UPC:	
· List Price:	4.04		0	CAS Number:	
SAH		450			

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

	Search Grywordth, Bert	hipedury, etc.			9	🛒 Cart 🔳 🛛 Total : 0.00 t	150
	Galls All Transactions, Non	Catalog Roma Banket/Stand	ng Onlar				
Checkout General Details					0 0 1	Transaction Summary Dransaction # 102508 Create Date: 05/15/2018	
	tform: O Credit Card O PO		Elaniant Order Need By Date:	Select Daniel	• •	Supplier: (Laples (Deno) Requester: Advance Canto Selection: Active	
	ethod Decross:			Safect Commodity Code	• •	Statut: Unsubmitted Trans System Note: Name Total Line Terms	
	inder #1 1/11		State Tax	Select Tax Code3	•	Subsolal State Tax	3
						S & H: Total Value (USD):	5
					Continue	Transaction Name	Naples (Demo)
Delivery Details	Inter-Admente Cardane		Looke Sharkking L		(Dec	Notes and Attachments	<u> </u>
Billing Details	Antes - Queen		Location Advectoration Building	/	Dep	an Internal Note 🖂 😨	External Note 🖂 🛞
Gi, Details					Date		
Line Bern Details (Firse 2)					Chao		
View Workflow Details					(Dec	a .	

- 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).

Line Item Details (funk 2)							
em Details	Quantity	Contract Price	Subtotal	Так	S&H	Item Total (USD)	
Divon Ticonderoga Pencils. +2 Soft. Dozen	2	3.18 / Dozen	6.36	0.00	0.00	6.36	more
			Notes and Attachments:				
			Internal Note 🖃 🕥	External Note	. 🖻 🕲		
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			Notes and Attachments:				
			Internal Note 🗐 🕥	External Note			
							Continue
View Workflow Details							Shee

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.



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

Filter By: Submitted	Showing: All	Sort By: Create Date	•	Search Transaction# or PO#	Q Clear All
11/13/2018 15:39-Cianfarini-AC Books	Total Line Items: 1 PO #: 159	Total Value: 44.88 USD Supplier: AC Books	Create Date: 11/13/2018 Requester: Adrienne Cianfarini	Order Type: Standard Approve Arrival Date:	Submitted to Supplier
10/30/2018 13:32-Clanfarini-AC Books Transaction #: 129105	Total Line Items: 1 PO #: 158	Total Value: 44.88 USD Supplier: AC Books	Create Date: 10/30/2018 Requester: Adrienne Cianfarini	Order Type: Standard Approve Arrival Date:	Submitted to Supplier

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.

neral Details						
• Order Classification:	Blanket Order O Standing	g Order	• Start Date:	04/26/2018		
· Order ID:	BPO-AC Books 2018		Expiration Date:	04/26/2019	× 🛱	
Order Description:			Total Order Value:	100000		USD

- 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.

Shop Manage (0)	- Receive Invoi	се		Pending Transaction(s)
	Search Keyword(s), Item Nu	mbers, etc.		Q 💭 Cart 21 Total: 555.89 USD
	Go to: All Transactions Non-Ca	alog Items Blanket Order/Standing Orde	r	
ceive Transactions (Total	2)			
howing: Last 30 days	✓ Sort By: Create Date	~		Search Transaction#, PO#, Aux Field 1, A Q Clear A
04/16/2019 12:29-Weidner	Total Line Items: 1	Total Value: 10.49 USD	Create Date: 04/16/2019	Unsubmitted Change Order
	PO #: 9	Supplier: Office Depot - DEMO	Requester: Erica Weidner	Unsubmitted Change Order
Transaction #: 142562				
Transaction #: 142562 03/15/2019 16:13-Weidner	Total Line Items: 2	Total Value: 71.91 USD	Create Date: 03/15/2019	Submitted to Supplier

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

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	FORM SEARCH HISTO		living			Clear All	@ ×		
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	17 0								
	.+.								

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

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☆ 🔗 10 10 10 10 10			Purchase Orc	ler LookUp		I	8	
A PORC - Purcha	se Order Re	Purchase Order Lo	ookUp			e All Cancel (ancel All	
PO Numbe		Ok	Cancel	Finish	Help	_		
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	Item Description		Vendor Part	Qty Ordered	l Unit	MSDS Qty Accepted Rcvd		
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10								
Receive	d By			Accept	t All Items			

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

Accept All Items	

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.