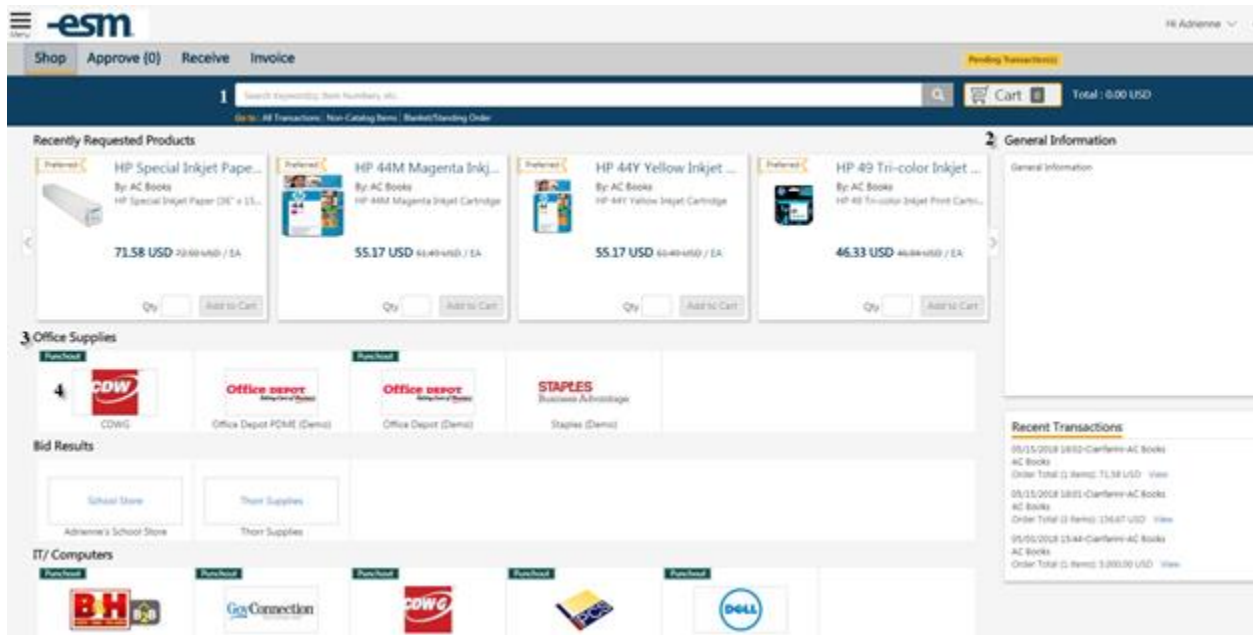


# ESM Purchase: Requester Reference Quick Guide

## 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.



Search Keyword(s), Item Numbers, etc.

Go to : All Transactions | Non-Catalog Items | **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.

1. Select Supplier

ac books 1 record(s) found

Supplier Name	GL Code	Address	Contact Name	Contact Email / PO Email	Contact Phone	Action
 ac books	123	123 Main Street Philadelphia, PA, 19115	William C. Bontempo	wbontempo@kean.edu wbontempo@kean.edu	2155551234	Select

Couldn't find the supplier you are looking for? [Add New Supplier](#)

2. Add Item

- 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](mailto: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.

1. Select Supplier: ac books

2. Add Item

Item/Service:	Description	MFG/Provider:	
UOM:	Each	MFG/Provider Part #:	
Qty:		Catalog Item #:	
List Price:	0.00	UPC:	
S & H:		CAS Number:	

USD

Add to Cart

4. Add the item to the cart.

## Cart

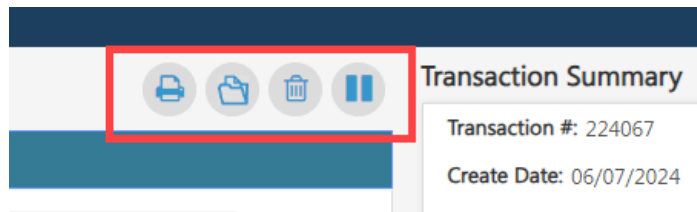
In the cart:

- 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.
- Make sure that the General Details and GL Details include your grants Project ID.



## Actions in Checkout

The image shows the 'Checkout' form. It includes sections for 'General Details' (Payment Form, Release Method, Order Type, Purchase Order #, Fiscal Date, Market Order, Need By Date, Commodity Code, State Tax) and a list of details on the left (Delivery, Billing, GL, Line Item, View Workflow). A red arrow points to the 'Continue' button at the bottom right of the form. Another red arrow points to the 'Submit' button at the bottom left. On the right side, there is a 'Transaction Summary' sidebar showing transaction details and a 'Notes and Attachments' section with internal and external note options.

- 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).

The image shows the 'GL Details' form. It displays a table of line items with columns for Item Details, Quantity, Contract Price, Subtotal, Tax, S & H, and Item Total (USD). Two line items are visible: 'Dixon Ticonderoga Pencils #2 Soft, Dozen' and 'Dixon Oriole Pencils #2 Soft, Dozen'. A red arrow points to the 'Continue' button at the bottom right of the form. Below the table, there is a 'Notes and Attachments' section with internal and external note options.

## All Transactions

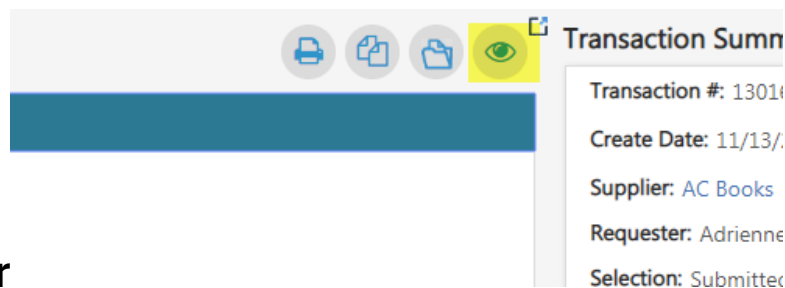
Track progress or review transactions:

- **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.

Filter By: Submitted	Showing: All	Sort By: Create Date	Search Transactions or PO#	Clear All
11/13/2018 15:39-Cianfarini-AC Books Transaction #: 13018	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-Cianfarini-AC Books Transaction #: 129106	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

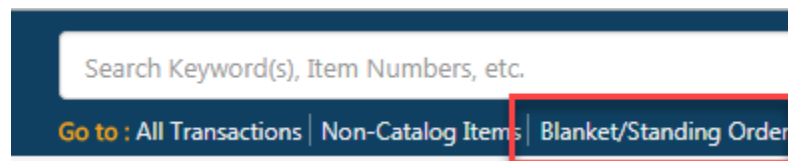
### Overview

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.

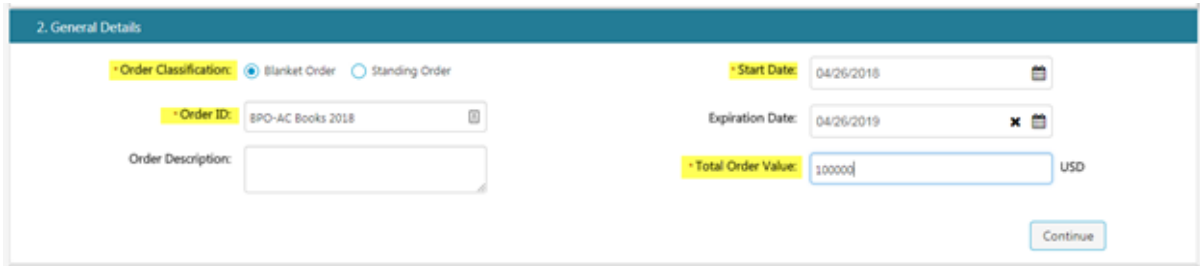
## Creating a Blanket or Standing Purchase Order



Search Keyword(s), Item Numbers, etc.

Go to : All Transactions | Non-Catalog Items | **Blanket/Standing Order**

1. Click the **Blanket/Standing Order** link. Then 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.



2. General Details

Order Classification: ☒ Blanket Order ☐ Standing Order

Order ID: BPO-AC Books 2018

Order Description:

Start Date: 04/26/2018

Expiration Date: 04/26/2019


Total Order Value: 100000 USD

Continue

- 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.

### 3. Notifications

 Add Notification



- | Type | Criteria   | Next N |
|------|--|--------|
| 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 <b>Update</b> 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 <b>Update</b> 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.

The screenshot shows the 'Receive' tab selected in the top navigation bar. Below the navigation bar is a search bar with the text 'Search Keyword(s), Item Numbers, etc.' and a 'Go to:' dropdown menu with options: 'All Transactions', 'Non-Catalog Items', and 'Blanket Order/Standing Order'. To the right of the search bar is a 'Cart' icon with the number '21' and a 'Total: 555.89 USD' label. Below the search bar is a 'Receive Transactions (Total 2)' section. It contains two transaction entries:

Transaction #	PO #	Supplier	Requester	Status
04/16/2019 12:29-Weidner...	142562	Office Depot - DEMO	Erica Weidner	Unsubmitted Change Order
03/15/2019 16:13-Weidner...	140023	W.B. Mason	Erica Weidner	Submitted to Supplier

## Receiving Items

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.

The screenshot shows the 'Line Item Details' form for two items. Each item has a 'Qty Received' field and a 'Total Qty Received' field, both highlighted with a red box. The 'Qty Received' field is currently empty, and the 'Total Qty Received' field shows '0'. Below these fields are 'Notes and Attachments' sections with 'Internal Note' and 'External Note' buttons. The right sidebar shows the 'Selection: Open' status, 'Submitted to Supplier' status, and a summary of the transaction details.

Item Details	Quantity	Contract Price	Subtotal	Tax	S & H	Item Total (USD)
1 Blinding White Copy Paper, 8 1/2 x 11, 98 Bright, 20 lb., 5000/CT	1	67.99 / CT	67.99	0.00	0.00	67.99
2 Plain Unruled Refill Card, 2 1/4 x 4, White, 100 Cards/Pack	1	3.92 / PK	3.92	0.00	0.00	3.92

**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.