

ESM Purchase™ Requester Reference Guide – New User Interface



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ESM Purchase™ Requester Process

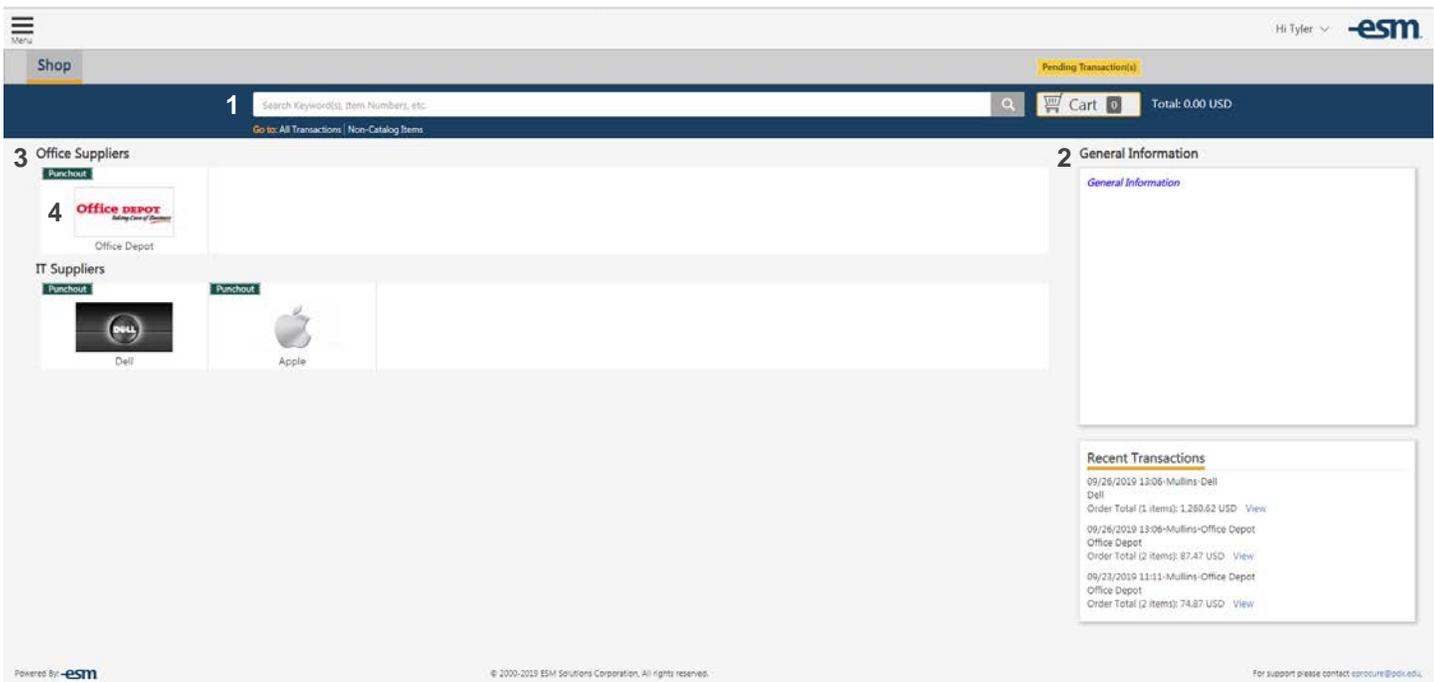
This document provides a condensed overview of the ESM Purchase™ Requester Process for a General User. It will demonstrate with short text descriptions supported by screen shots for each step explained.

Shop

The Requester can select various items from assigned catalogs. There are two types of catalogs: PunchOut and Hosted. A Hosted Catalog contains items that are uploaded into ESM Purchase, and a PunchOut Catalog opens a customized version of the Supplier's website.

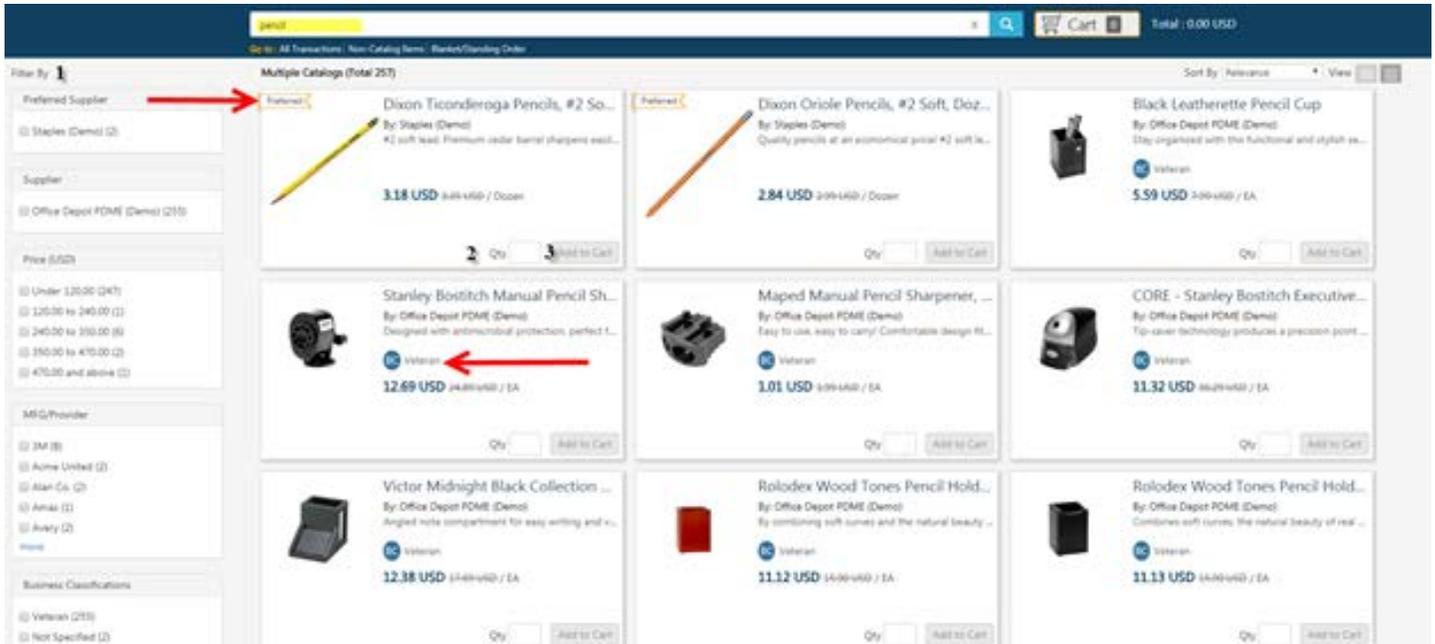
Currently Portland State University's ESM Solution, ePSU Marketplace, only utilizes PunchOut Catalogs.

If a user opens multiple PunchOut catalog sessions from the Shop page, each session will open in a separate browser window.



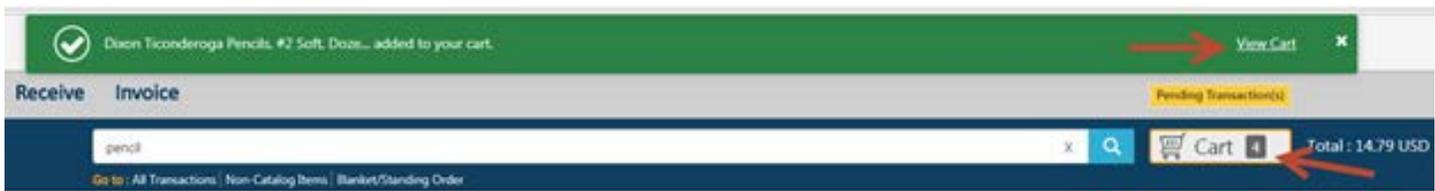
1. Search Items: Search for items from assigned Hosted catalogs
2. Information Box: Entity-wide material determined by Sys Admin
3. Category: Header to group catalogs
4. Catalog: Icon for easy access to assigned catalogs

The Requester can select an assigned catalog or search for items. The System Administrator may have denoted a Supplier as preferred or with a business classification, which will appear in the search results.



1. Filter By: Criteria to narrow down Shopping Results
2. Qty: Desired quantity for transaction
3. Add to Cart: Select when all quantities are completed

After selecting 'Add to Cart', the total quantity of item(s) and price is listed behind the **Cart**. The Requester can continue to **Shop**, or go to their **Cart** by selecting either the **Cart** or **View Cart** toast message indicated below.



Cart

The Requester can edit the quantity or delete items. Then, Convert Cart to X transaction(s) by selecting **Checkout**. More than one transaction is created if the items are from multiple Suppliers.

The screenshot shows the 'Shop' interface with a search bar and a cart icon indicating 4 items for a total of 1,348.09 USD. The 'Item Summary' table lists three items:

Item Details	Quantity	Price (USD)	Subtotal (USD)
Boise(R) X-9(R) Multi-Use Copy Paper, Letter Paper Size, 20 Lb, Bright White, 500 Sheets Per Ream, Case Of 10 Reams By: Office Depot Catalog Item #: 196517 Mfg/Provider:	2	34.99 / CS	69.98
Pilot(R) G-2(R) Retractable Gel Pens, Fine Point, 0.7 mm, Clear Barrels, Purple Ink, Pack Of 12 By: Office Depot Catalog Item #: 545961 Mfg/Provider:	1	17.49 / DZN	17.49
PSU Thin 13" Laptop - XPS 13 9380: Base:XPS 13 (9380) By: Dell Catalog Item #: 210-ARIF Mfg/Provider: Dell	1	1,260.62 / EA	1,260.62

The 'Cart Summary' on the right shows 4 items in the cart, 2 suppliers, and a total of 1,348.09 USD. A red arrow points from the 'Checkout' button in the cart summary to the 'Checkout' button in the item summary table.

Checkout

The Requester can continue to add items to converted transactions in the Checkout tab, if the Supplier is the same.

Complete each portion the Checkout sections to complete the order. Select **Continue** to save/confirm information in each section. The order can be Printed, Archived, Deleted, or put on Held using the icons at the top of the Checkout Screen.

Enter the general details of the order and confirm/modify the default Bill-to and Ship-to locations. Select **Continue** under each of the Checkout sections to save and proceed to the next section.

The screenshot shows the 'Shop' interface in the 'Checkout' tab, with a 'Pending Transaction(s)' status and a total of 0.00 USD. The 'General Details' section shows 'Payment Form: Credit Card' and 'Fiscal Date: 09/26/2019'. A red arrow points to the 'Continue' button. The 'Transaction Summary' on the right shows:

Transaction Summary	
Transaction #:	153198
Create Date:	09/26/2019
Supplier:	Dell
Requester:	Tyler Mullins
Selection:	Active
Status:	Unsubmitted Transaction
System Note:	None
Total Line Items:	1
Subtotal:	1,260.62
Tax:	0.00
S & H:	0.00
Total Value (USD):	1,260.62

Below the general details are sections for 'Delivery Details', 'Billing Details', and 'Line Item Details', each with a 'Change' link. A 'View Workflow Details' link is also present.

Requesters should confirm the Line Item Details including quantity and price. Select **Continue** to confirm Line Item Details.

Line Item Details (Total: 2)							
Item Details	* Quantity	Contract Price	Subtotal	Tax	S & H	Item Total (USD)	
1  Boise(R) X-9(R) Multi-Use Copy Paper, Letter Paper Size, 20 Lb, Bright White, 500 Sheets Per Ream, Case Of 10 Reams	2	34.99 / CS	69.98	0.00	0.00	69.98	more... ✖
2  Pilot(R) G-2(R) Retractable Gel Pens, Fine Point, 0.7 mm, Clear Barrels, Purple Ink, Pack Of 12	1	17.49 / DZN	17.49	0.00	0.00	17.49	more... ✖

Continue

View Workflow Details [Change](#)

Any approval workflows will generate after the order is validated. If any transaction validation rules are triggered, more information will be listed under the System Note. Once the condition is resolved, the transaction can be re-validated for approval.

The Requester can either send the transaction through the approval workflow process or release it to the Supplier based on configuration settings. If approval workflows are required, select **Submit** to send the transaction through any triggered approval workflows.

Checkout

- General Details [Change](#)
- Delivery Details [Change](#)
- Billing Details [Change](#)
- GL Details [Change](#)
- Line Item Details (Total: 2) [Change](#)

[View Workflow Details](#)

Workflow Name	Approver Name	Status
Building 1 VP	DR: Adrienne Corbin	Pending
	DR: Manage Tab User	Pending
Account Clerk	Manage Tab User	Pending
	DR: Adrienne Corbin	Pending

Forward **Submit**

Transaction Summary

Transaction #: 152938
 Create Date: 01/15/2018
 Supplier: Staples (Demed)
 Requester: Adrienne Corbin
 Selection: Active
 Status: Unsubmitted Transaction

System Note: Pending

Total Line Items: 2
 Subtotal: 8.20
 State Tax: 0.00
 S & H: 0.00
 Total Value (USD): 8.20

Transaction Name
 01/15/2018 14:28 Corbin-Staples (Demed) [Update](#)

Notes and Attachments
 Internal Note [+](#) External Note [+](#)

If no approval workflows are required, select **Prepare CC Order**. This button will be in the same location as the **Submit** button shown above.

The **Forward** option can be used to submit the order to a different user's checkout under **All Transactions**.

If an entity is configured for the final approver to release transactions to the supplier, the requester will receive an email notification when the release occurs.

Prepare CC Order

To enter the credit card information for an order, select **Prepare CC Order**.

Billing Details Attn :
 GL Details
 Line Item Details (Total: 1)
[View Workflow Details](#)
Prepare CC Order

The user will be presented with a review of the order and the opportunity to **Print**. Select **Place Your Order** to enter CC information.

Review Credit Card



Purchase Order #: 159
AC Books

Place Your Order
Order Total: 44.88 USD

<p>Date: 11/14/2018 Transaction #: 130161 Authorized By: Manage Tab User</p>	<p>Requested By: Adrienne Cianfarini Requester Email: acianfarini@esmsolutions.com Phone: 2154449300</p>	
<p>Supplier Address: 123 Main Street Philadelphia, PA 19116 United States Attn: Adrienne Cianfarini Phone: 2155551234</p>	<p>Ship To: Adrienne's School Default Location 2700 Kelly Drive Suite 100 Warrington, PA 18976 United States Attn: Adrienne Cianfarini Phone: 2154449300</p>	<p>Bill To: Adrienne's School Administrative Building 678 Campus Way Philadelphia, PA 19116 United States Attn: Dean Phone: 2155551234</p>

Order Comments:

Line #	Item #	Description	UOM	Qty	Unit Price (USD)	Line Total (USD)
1	51626A	HP 26 Black Inkjet Print Cartridge Ship To Attn: Adrienne Cianfarini MFG/Provider: Hewlett-Packard MFG/Provider Part #: 51626A	EA	1	44.88	44.88

Enter the card information and select **Place Your Order** and confirm the pop-up.

Purchase Order #: 159

Subtotal:	44.88 USD
S & H:	0.00 USD
State Tax:	0.00 USD
Order Total:	44.88 USD

• Name on Card:

• Card #:

Card Type: **VISA**

• Expiration Date:

• Contact Phone #:

Checkout Forward

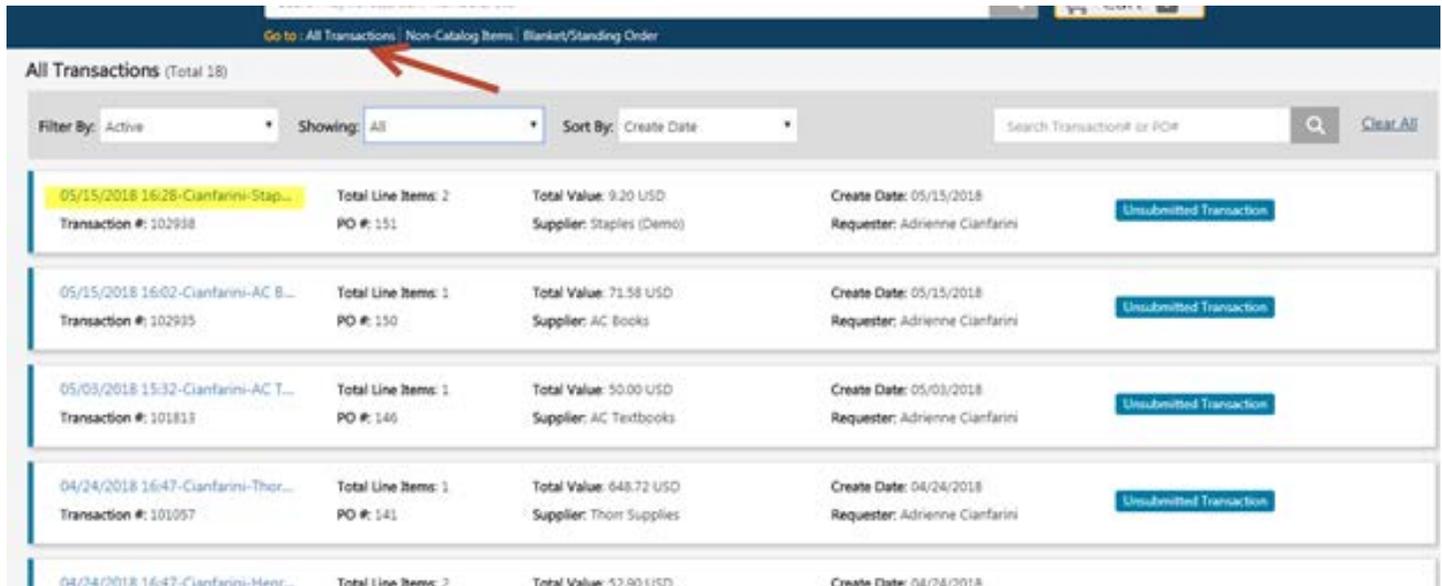
Based on entity configuration settings, the Requester can forward their transaction to another Checkout user. **Forward** is an option located at the bottom of the **Checkout** View, and the Requester can search for the desired user.

✓ Line Item Details (Total: 2)

View Workflow Details

All Transactions

Users are able to track the progress or view previous transactions by selecting *All Transactions* below the search bar. To open a transaction, select the transaction name.



Go to: [All Transactions](#) | [Non-Catalog Items](#) | [Blanket/Standing Order](#)

All Transactions (Total 18)

Filter By: Active | Showing: All | Sort By: Create Date | Search Transaction# or PO# | Clear All

05/15/2018 16:28-Cianfarini-Stap... Transaction #: 102938	Total Line Items: 2 PO #: 151	Total Value: 9.20 USD Supplier: Staples (Demo)	Create Date: 05/15/2018 Requester: Adrienne Cianfarini	Unsubmitted Transaction
05/15/2018 16:02-Cianfarini-AC B... Transaction #: 102935	Total Line Items: 1 PO #: 150	Total Value: 71.58 USD Supplier: AC Books	Create Date: 05/15/2018 Requester: Adrienne Cianfarini	Unsubmitted Transaction
05/03/2018 15:32-Cianfarini-AC T... Transaction #: 101813	Total Line Items: 1 PO #: 146	Total Value: 50.00 USD Supplier: AC Textbooks	Create Date: 05/03/2018 Requester: Adrienne Cianfarini	Unsubmitted Transaction
04/24/2018 16:47-Cianfarini-Thor... Transaction #: 101057	Total Line Items: 1 PO #: 141	Total Value: 648.72 USD Supplier: Thornt Supplies	Create Date: 04/24/2018 Requester: Adrienne Cianfarini	Unsubmitted Transaction
04/24/2018 16:47-Cianfarini-Henr... Transaction #: 101057	Total Line Items: 2 PO #: 141	Total Value: 47.90 USD Supplier: Thornt Supplies	Create Date: 04/24/2018 Requester: Adrienne Cianfarini	Unsubmitted Transaction

The Requester can monitor the Status of the Transaction to review its current state.

Statuses can include, but are not limited to:

Unsubmitted Transaction: Pending Next Step option of Request Approval or Release PO (if no approval necessary)

Pending Approval: In approval process

CC Information Required: Credit Card is needed before release

Pending Release: Ready to release

Approval Rejected: Rejected by Approver

Submitted to Supplier: Transaction successfully sent to Supplier

Search Capabilities in All Transactions

The Requester can review all of their created transactions by using the provided search criteria. **Any changes to the selection/sort by will remain the default until updated.**

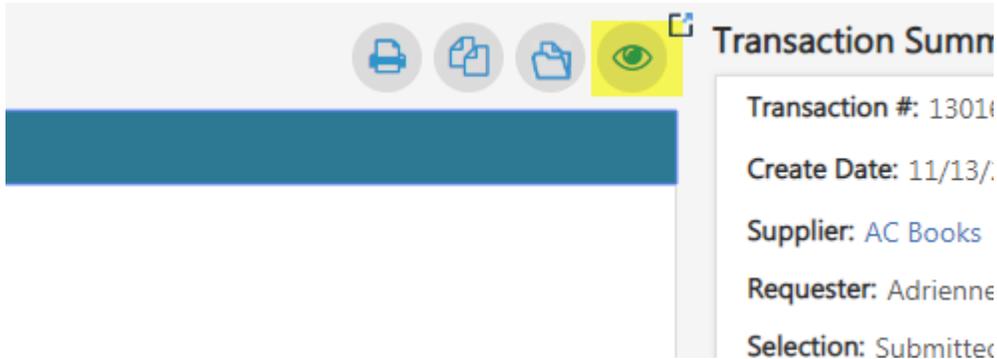
The screenshot displays the 'All Transactions' interface with the following elements:

- 1 Filter By:** A dropdown menu is open, showing options: Active, Waiting, Hold, Archive, Submitted, Received, and All. The 'All' option is highlighted.
- 2 Showing:** A dropdown menu set to 'All'.
- 3 Sort By:** A dropdown menu set to 'Create Date'.
- 4 Search Bar:** A search input field with the placeholder text 'Search Transaction# or PO#' and a 'Clear All' button.
- Transaction Details:** Two transaction rows are visible. The first row shows 'Total Line Items: 2', 'Total Value: 9.20 USD', 'PO #: 151', 'Supplier: Staples (Demo)', 'Create Date: 05/15/2018', and 'Requester: Adrienne Cianfarini'. The second row shows 'Total Line Items: 1', 'Total Value: 71.58 USD', and 'Create Date: 05/15/2018'. Both rows have an 'Unsubmitted Transaction' button.

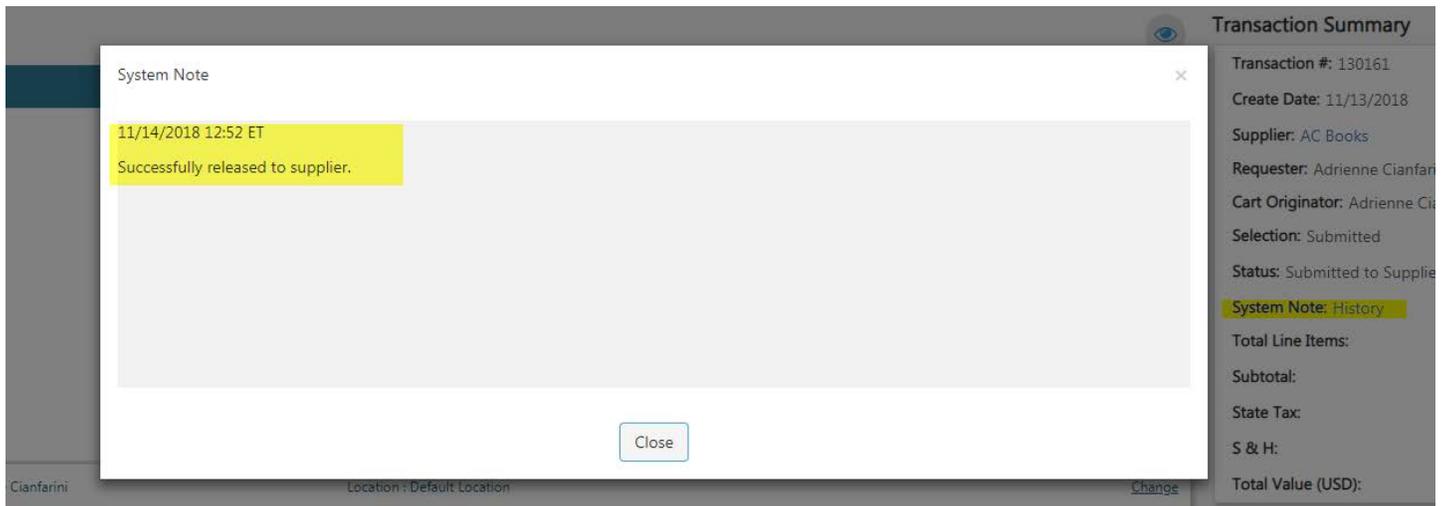
1. Filter by: Search filter to indicate next user/system action (highlighted below) (original default of Active)
 - a. Active: The user's action is needed
 - b. Waiting: Waiting on another user/system action
 - c. Hold: Paused transactions for later action
 - d. Archive: Transactions with stored actions
 - e. Submitted: Transactions sent to Supplier
 - f. Received: Transactions with items obtained
 - g. Ad Hoc: Transactions waiting on additional approver
 - h. All Last 30 days, All Last 90 days, All: Transactions within specified date range
2. Showing: Search filter for Date ranges; 7 Days, 30 Days, 60 Days, 90 Days, or All
3. Sort by: Determines the displayed order of transactions by Acct #, Create Date, Payment Form, PO #, Transaction #, Transaction Name, Status, Supplier (A-Z), (Supplier Z-A), or Recently Added (original default of Recently Added)
4. Search Bar: Locate a specific transaction with the Transaction or Purchase Order Number.

View Order

The user may select the *View Order icon* under the All Transactions/Approve/Manage screen.

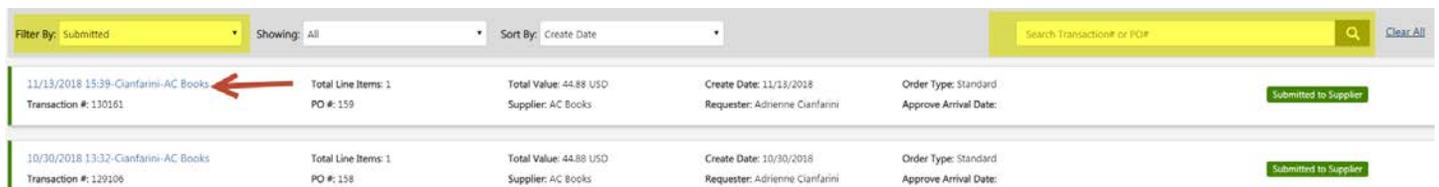


The System Note History states the time the order was successfully released.



Re-Release Order

Locate the order using the Filter By Option or the Search bar and select the Transaction Name to open the order.



Select **Re-Release Order**.

✓ Line Item Details (Total: 1)

View Workflow Details

View Receipts Change Order **Re-Release Order**

Select **Place Your Order** and confirm based on payment type. If the Payment Form is Credit Card and it was declined, provide new card information. Select **Continue** and **Place Your Order**.

Review Credit Card



Purchase Order #: 159

AC Books

Place Your Order

Order Total: 44.88 USD

DUPLICATE ORDER

Date: 11/14/2018
 Transaction #: 130161
 Authorized By: Manage Tab User

Requested By: Adrienne Cianfarini
 Requester Email: acianfarini@esmsolutions.com
 Phone: 2154449300

Supplier Address:
 123 Main Street
 Philadelphia, PA 19116
 United States
 Attn: Adrienne Cianfarini
 Phone: 2155551234

Ship To:
 Adrienne's School
 Default Location
 2700 Kelly Drive
 Suite 100
 Warrington, PA 18976
 United States
 Attn: Adrienne Cianfarini
 Phone: 2154449300

Bill To:
 Adrienne's School
 Administrative Building
 678 Campus Way
 Philadelphia, PA 19116
 United States
 Attn: Dean
 Phone: 2155551234

Order Comments:

Line #	Item #	Description	UOM	Qty	Unit Price (USD)	Line Total (USD)
1	51626A	HP 26 Black Inkjet Print Cartridge Ship To Attn: Adrienne Cianfarini MFG/Provider: Hewlett-Packard MFG/Provider Part #: 51626A	EA	1	44.88	44.88

Subtotal: 44.88 USD

Note: Re-released order will state "Duplicate Order."