How to Create a Non-Catalog PO in ESM ePurchase

1. Login to the ESM ePurchasing system. Above I have referenced a screenshot of the dashboard.

2. From the dashboard select Non-Catalog Items to select a supplier.
3. Type in the supplier’s name and search using the magnifying glass prompt to the right of the “select supplier” field.

4. If more than one supplier is listed:
   - Make sure the “select” button has a blue outline around it (active vendor).
   - Double check that the remittance address on the invoice/quote/estimate matches the address presented in this field.
5. Once your supplier has been selected you will be directed to the screen above to input details about the item. Once completed hit the “add to cart” button in the bottom right-hand corner.

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item/Service</td>
<td>Description of item being purchased</td>
</tr>
<tr>
<td>UOM</td>
<td>Unit of Measure</td>
</tr>
<tr>
<td>QTY</td>
<td>Quantity</td>
</tr>
<tr>
<td>List Price</td>
<td>Cost in USD</td>
</tr>
</tbody>
</table>

*Please note the asterisk denotes a required field and MUST be completed to proceed with creation of the PO. All other fields listed pertain to specific department needs.*

6. The system will not automatically take you to the cart but rather populate a blank item page if more products need to be added to this transaction.

*If more items are needed, repeat Step Five until satisfied.*

7. Once all items have been added to the cart, click the “cart” icon in the top right of the screen.
8. The next screen will be your **Item/Cart Summary** page where you can view the details of the specific item(s) and the cart. You can update the quantity, delete the transaction, or ideally proceed to checkout. A prompt box will generate confirming you wish to continue.
9. The next page should be the **Checkout** where you see the below fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Functions</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Details</td>
<td>Details about the requisition</td>
<td>PO/CC, and commodity code</td>
</tr>
<tr>
<td>Order Release Details</td>
<td>Where and how the order is released.</td>
<td>User can edit the release email and method for the supplier.</td>
</tr>
<tr>
<td>Delivery Details</td>
<td>Where the item should be delivered</td>
<td>Select an address from the drop down or search</td>
</tr>
<tr>
<td>Billing Details</td>
<td>Who is being charged for the purchase</td>
<td>Always will default to Accounts Payable address</td>
</tr>
<tr>
<td>GL Details</td>
<td>Accounting Info</td>
<td>Enter in accounting streams</td>
</tr>
<tr>
<td>Line-Item Details</td>
<td>Accounting Info/line-item info</td>
<td>Edit item details/GL details</td>
</tr>
<tr>
<td>View Workflow Details</td>
<td>Who/When it is approved</td>
<td>See who your approvers are and where the process is.</td>
</tr>
</tbody>
</table>
10. **General Details -Required Fields**
   
   a. **Payment Form** - Here we select PO or Credit Card (please see *How to Create a Non-Catalog Requisition with a Credit Card payment* for more detailed steps).
   
   b. **Fiscal Date** - Will always populate for “today’s date”
   
   c. **Please note the “Need By Date” will not be a feature in the live environment**.
   
   d. **Commodity Code** - The category the purchase falls under can be selected from the drop down or typed in manually.

*All other fields are optional or may pertain to a specific department’s need but are not required to proceed.*

11. **Order Release Details**

Here we can edit the email address and release method for the supplier within the specific transaction.

*Please note the supplier should have their most updated PO email address in Payment Works. If that information is accurate, you can bypass this screen IT IS not a required field.*
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td>Edit PO email to supplier</td>
</tr>
<tr>
<td>Email with PDF Attachment</td>
<td>Edit PO email to supplier with PDF for attachments</td>
</tr>
<tr>
<td>Manual</td>
<td>Defaults to suppliers’ email in PW (default)</td>
</tr>
<tr>
<td>Manual with PDF Attachment</td>
<td>Defaults to suppliers’ email in PW with PDF for attachments</td>
</tr>
<tr>
<td>Confirming Request</td>
<td>When Procurement creates the PO in Banner and then ESM after (please contact Procurement for these types of requests)</td>
</tr>
</tbody>
</table>

12. **Delivery Details**

Here we can search the delivery address or manually type it in. Once selected it can be made the default address by adjusting the toggle feature to green.
13. **Billing Details**

Here the billing address will ALWAYS default to the Accounts Payable department, similar to Jaggaer.

*Please note you need to change the default delivery/billing addresses in your profile.*
Here we can add our accounting information (index, fund, org and program codes). If you have used the system before, the drop-down arrow will populate your most recently used accounting details (stores the last 12). If this is your first requisition and/or you need to input new data, select the plus sign (+) to the right of the drop-down arrow.
a. Input the index number into the **Index Code** field, select the correct code once it populates and the additional field **EXCEPT** account code should auto fill.

b. Go into the account field and manually type in (or select from drop down) the code you wish to use and select it **ONLY** when you see the default detail info populate (if you don't it will erase all your previously saved GL data) and click apply.

c. From here your GL details will populate. You can repeat Step 13 if you need to split the accounting.
   - We can split the accounting by %, edit the details, “favorite” the sequence or delete the accounting string entirely. Once complete hit the continue button in the right-hand corner.

*There is a place to split by dollar amount in the Line-Item Details Tab.*

15. **Line-Item Details**

Here we can change the following:
- Update the quantity.
- Edit the item description.
- Add internal notes and attachments (Remember these are NOT visible to the supplier).
- Add external notes and attachments (Remember these are visible to the supplier).
- Delete the entire line item or make changes to the Item Details/GL Details screens.
*Please note that on the GL details screen under the Line-Item Tab (more*) you can now split by USD amount. Once completed please hit the continue button at the bottom right-hand corner of the screen above.

16. View Workflow Details
On this screen we can view the details of the workflow. See who your approvers are and at what place the requisition is pending during the PO creation process.

**Forward** - User can create the requisition but forward it over to someone else who has the authority to submit a requisition.

*Note this will delete the initial user’s info and replace their name with the party it was forwarded to. You can see the originator in the internal notes tab.*

**AD HOC REVIEW** - This is not an APPROVER, it is reserved for additional viewing PRIOR to a request for approval.

**Request Approval** - Most common selection to start the approval process. Once selected a time stamp will be generated until completion.
Please note that there is a Transaction Summary within the checkout. Here you can reference the details about the transaction:

- Transaction Number (similar to a requisition number in Jaggaer).
- Creation Date
- Supplier
- Requester (who created the requisition)
- Selection-status of the transaction (should read **active** while creating the requisition).
- Status-status of the PO (pending validation is prior to request for approval will update to **submitted to supplier** once PO is successfully created).
- System Note: Any error messages will populate here and can be selected to retrieve further details.
- Total Line Items: How many items are in this transaction?
- Subtotal/Total Value: Amount of pending PO.
- You can also change the name of the transaction from the system default (once you request approval this option will not be available)
- You can view internal/external notes.
1. Select the credit card radio button.
2. Follow the transactional training from Steps 11-15 - How to Create a Non-Catalog PO in ESM ePurchase.
3. Notice there is no **Workflow Details** because there are no approvals required for P-Card purchases.

4. Select **Prepare CC Order**.
5. A summary screen will generate with the details of your transaction.

6. Select **Place Your Order** in either corner of the screen.
7. A dialog box will generate for you to input your credit card info into the appropriate fields.

*Please note there is no way to save CC information within the ePurchase system.

8. Select **Place Your Order** twice. **First**, in the dialog box where you input your CC information and **second**, when the prompt populates to confirm submitting electronically to the supplier.
How to Create a Punchout Transaction in ESM ePurchase

1. Login to the ESM ePurchasing system. Above I have referenced a screenshot of the dashboard.
2. Below the Recently Requested Products, the punchout catalogs will display.

*Please be aware that you may have to disable your pop-up blocker feature here.*
3. Once a supplier has been selected, you will leave the ePurchase system and be taken directly to their punchout.
4. Process your transaction as normal, proceed to checkout and submit for approval.
5. A dialogue box should prompt to confirm that your “shopping cart” has been imported successfully into the ePurchase system marketplace.

6. Once back into the ePurchase system marketplace, you can continue to checkout or cancel the transaction with the red “x” within the item details dialogue box.

*Please note similar to Jaggaer, we CANNOT make changes to the order once it has pulled from punchout into the ePurchase system marketplace. If you need to adjust your order, complete the current transaction or cancel it and start a new one.
Since we **DO NOT** create PO’s from punchout transactions, this now becomes a CC order, and we can process it by referencing Steps 1-8 from *How to Create a Non-Catalog PO in ESM ePurchase (with a Credit Card Payment)*.
How to Create a Change Order for a PO

There are no items to process. Please select different search criteria.
1. From the homepage select “ALL TRANSACTIONS” In the search bar type the PO Number for the Change Order you wish to initiate and click the search magnifying class to the right.  
*If the PO does not populate remember to clear the filters from your advance search history. The outline around the box will turn from green to orange as shown above.

2. Click anywhere in the bar and the transaction will populate.  
*If you look at the bottom of the PO a “CHANGE ORDER” icon has now generated.  
“If a “CHANGE ORDER” icon has not generated the PO is still posting in Banner and may be in queue.

3. There are two changes that require a “Change Order” to be generated:  
   Quantity Change  
   Price Change (this can include shipping)  
   *Any other changes may constitute a new order please contact Procurement for additional questions).

4. Select the “CHANGE ORDER” icon and go to the “LINE-ITEM DETAILS” screen and select “EDIT” under the item description field. Here the quantity and price fields can be edited.
5. If an adjustment to the accounting string needs to be added to accommodate the additional quantities or pricing changes, click the “MORE” hyperlink and select the “GL DETAILS” tab. You can still add a previously saved accounting string from the drop down of favorites or select the plus sign to the right and add a new one. *Also remember a USD split can be done in this field.

6. Once all changes have been made you can click into the “VIEW WORKFLOW DETAILS” tab to see the previous workflow and if any additional approvals are needed for the change order.

7. Select “SUBMIT” button to start the approvals.
1. The approver of the change order will receive the same email as viewed in other approval transactions. Select the “REVIEW & APPROVE” tab to be taken directly to the transaction.

*Remember you can also search pending change order approvals under the “APPROVER” tab select “CHANGE ORDER”. Please disregard I have a manager tab in the provided screenshots because of my approving authority.
<table>
<thead>
<tr>
<th>General Details</th>
<th>General details of the PO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order Release Details</td>
<td>How the PO was released (electronic/manual)</td>
</tr>
<tr>
<td>Change Order Details</td>
<td>What changed with the original PO</td>
</tr>
</tbody>
</table>
2. If there are no changes to be made the approver can scroll to the bottom to select the “**APPROVE**” option to move it forward in the workflow. If you do not wish to approve the transaction select the “**REJECT**” option.

*Please reference [How to Create a Non-Catalog PO in ESM ePurchase – Section 15](#) for a refresher on the additional prompts.*
Approver Training-Non-Catalog Requisition

1. Once a requisitioner has sent off a transaction to be approved, the below email will generate to the approving party associated with that ORG code.

2. From the email there is a blue boxed hyperlink "REVIEW & APPROVE". Select this option and a second internet browser will open and take you directly to the transaction (be mindful of pop-up blockers if they are enabled).

3. From here you will see the transaction housed under your “APPROVER” tab at the top of the screen.

*If it is not generated there make sure to clear your search filters in the “ADVANCED SEARCH” field. Please disregard I have a manager tab in the provided screenshots because of my approving authority.
4. From here an approver can make changes to the transaction before it is forwarded to Procurement for final encumbrance.

   *Approvers please be mindful ANY changes made to the transaction will automatically forward it back to the requisitioner and the workflow will start from the beginning.

5. If there are no changes to be made the approver can scroll to the bottom to select the “APPROVE” option to move it forward in the workflow. If you do not wish to approve the transaction select the “REJECT” option.

   *Please reference How to Create a Non-Catalog PO in ESM ePurchase – Section 15 for a refresher on the additional prompts.
6. A prompt will populate asking do you want to approve “ONCE”, “MULTIPLE” or “CANCEL”.
   “ONCE” - If you have multiple levels of approval authority and want to approve each separate level at one occurrence.
   “MULTIPLE” - If you have multiple levels of approval authority and want to approve at each level separately.
7. Once completed you can view the workflow at the status where it reflects a time stamp of the approval.
8. Once the transaction has been approved by Procurement to become a PO, the requisitioner and approver will receive an email (see below).
If the supplier has registered in Payment Works, they will receive the below information about the PO/Order.