Catalog Order Guide ~ Sourced to Stores

This guide is for the process of ordering items sourced from a Warehouse which has a PeopleSoft UI Item number.

University of Iowa Stores include: General Stores, Dentistry Stores, and UIHC Stores.

Contents

Accessing System 1

One-Stop e-Procurement - Homepage 2

PReqs Home Page 2

Inventory Catalog Orders Section *2*

Favorites *3*

Create New Order 4

Item Search Page *5*

Shopping Cart – Catalog Order (Item Sourced to a Warehouse) *7*

Recurring Orders *9*

Shopping Cart – Catalog Order (Shopping Cart Favorites) *10*

Search Center 12

PReq Sidebar 13

Accessing System

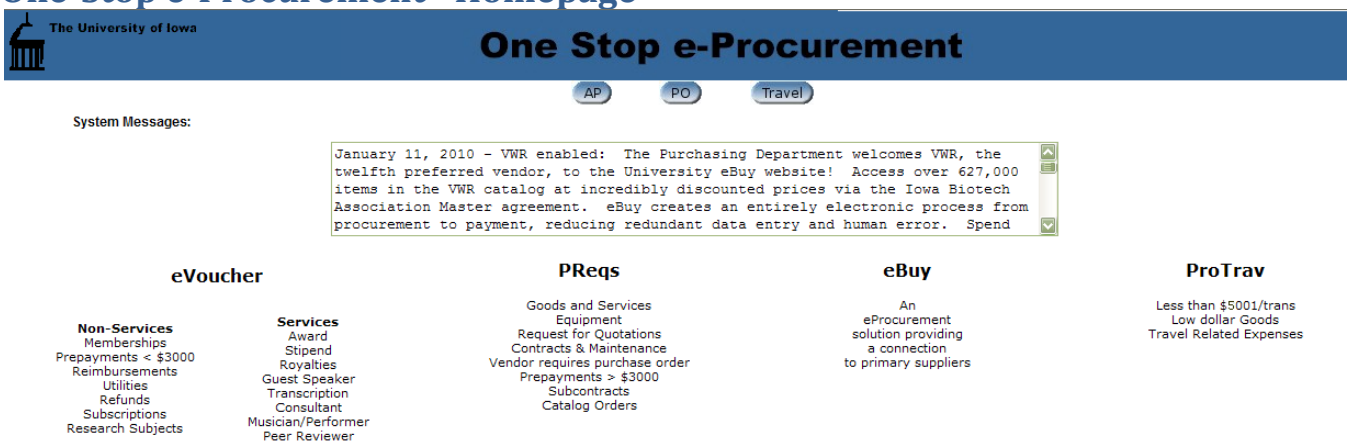
How to Access ePro (eVouchers, PReqs/Receiving)

1. Sign in to **Employee Self-Service**.
2. Navigate to **Business & Financial Systems**.
3. Click **ePro (eVouchers, Preqs/Receiving)**.
4. You will land on the **One Stop-eProcurement Page**.

If you need assistance with PReqs, please send an email to: preqs@uiowa.edu.

The Catalog Order form in the PReq system is for Item Sourcing from a Warehouse and Items Sourcing from a Vendor that have a PeopleSoft UI Item number. A user is defined as any employee who signs into PReqs application. A requester can be the same as a user or different than the user. Users must be assigned a requester or multiple requesters in order to be able to create purchase requisitions. If a user is not a requester or not assigned to a requester they cannot initiate a catalog order form.

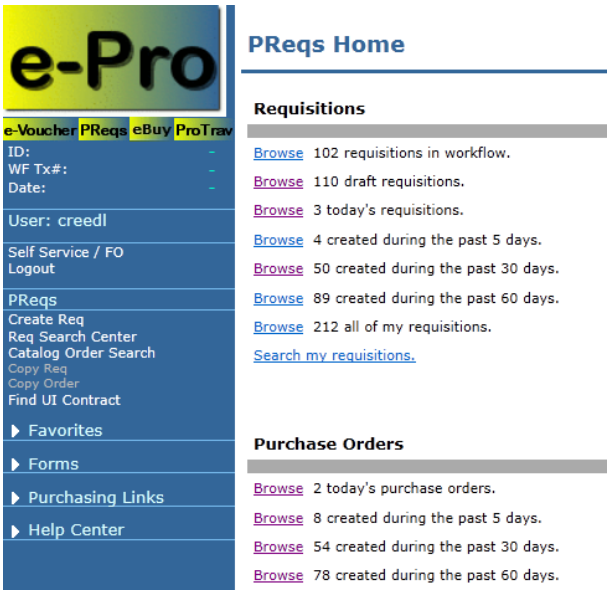
One-Stop e-Procurement - Homepage



The name of this Web Application is **PReqs** (***Purchase Requisitions***).

Please note the **System Messages**.

Click on **PReqs**.



PReqs Home Page

You should now be at PReqs Home Page. You can view Requisitions and Purchase Orders by clicking on the **Browse** next to the appropriate list.

The PReqs Home Page is where the Initiators can browse and check the status of the requisitions they created. You will not be able to see requisitions created by other Initiators on this page. This page shows only your own work. This is where Initiators will keep track of their requisitions and see when the requisition has been assigned a Purchase Order number.

Search my requisitions allows you to search by date range, PReq or PO numbers, and many other options.

Inventory Catalog Orders Section

Browse Draft – Order where the submit button has not been pressed.

Browse In Progress – Order that has at least one stock item that has not been sourced in PeopleSoft

Browse Complete – Order that has been submitted with only non-stock items, or has stock items that have all been sourced or cancelled

Browse Cancelled within the last 30 days – Order with at least one stock item that has been cancelled

Browse All my Stock Orders – Shows all stock orders

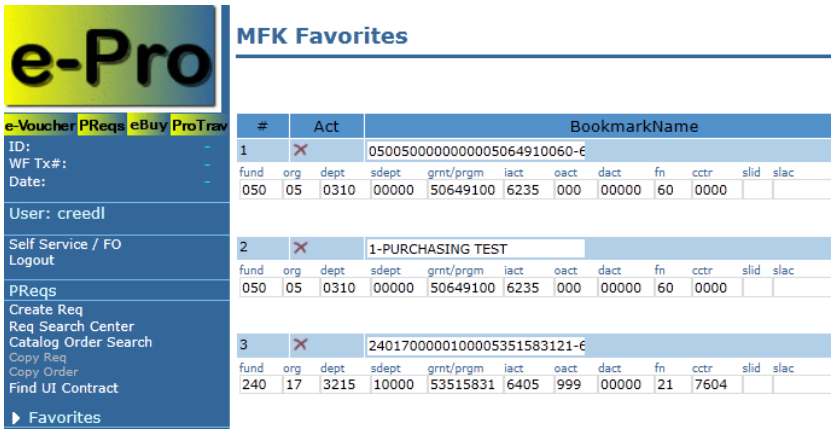
*Supply Items sourced from a Warehouse will only list under the Catalog Order section

*Supply Items sourced from a Vendor will list under Catalog Order section until a user has clicked submit, then will list under Requisition and Purchase Order section.

Favorites

Favorites is for saving frequently used information and can be added throughout the PReq by clicking add

You may also have the option to add this information manually.



Under **Favorites** on the side bar, click on the **MFK** to get to this screen.

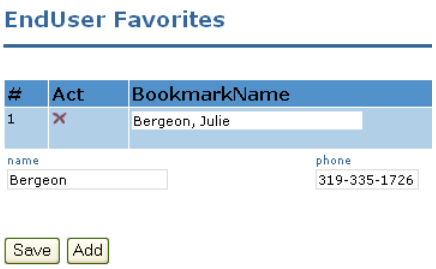
The **Bookmark Name** is a title you assign to the Favorite to identify and remember it by. It can be anything you want.

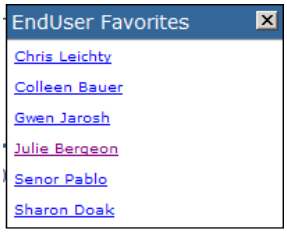
Fill in the MFK fields and click Save

Click Add to add another.

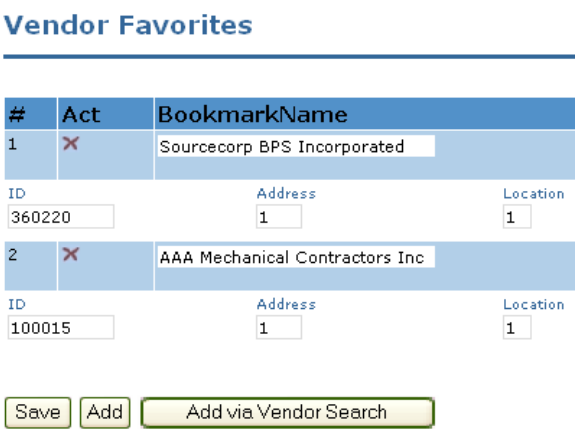
Always remember to save after adding any new entries.

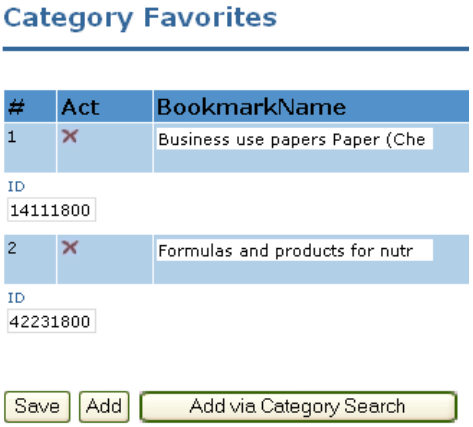
When you click **End User** under **Favorites** you may enter your **Bookmark Name** and tab to the Name field, enter the name and tab to the Phone field and enter the phone number, including area code and click Save





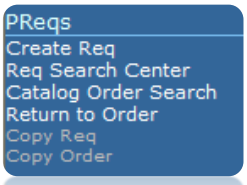
Wherever you see the a window displays a list of your favorites.





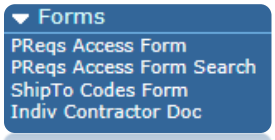
Here are examples of the other Favorites screen. Create your own Favorites for all the fields listed.

Create New Order



Click on the **Create Req** link on the side bar and you'll get the **Order By** page below

Note: If **Create Req** is grayed out, a Requester must fill out a **PReq Access** form to get the initiator signed up. See **PReqs Access** link on side-bar



Order By

Select one of the following to order by:

- **Purchase Requisition**- This requisition will be used to order by contract or by description for services, equipment, repairs and blanket orders that go to an outside vendor.
- **eBuy Shopping**- This selection will direct you to prime vendor contracts.
- **PeopleSoft Catalog Orders**- This selection will be used to order PeopleSoft item number products that are sourced from Hospital Process Stores, General Stores, Dentistry Stores, and College of Pharmacy Stores or from a vendor. Shopping Cart Favorites Recurring Orders

Select **PeopleSoft Catalog Orders**.

All fields on the **Order By** page are required.

Requester Information

Requester: Bergeon,Julie
HawkID: JBERGEON
Location: PCO-202-22
Phone: 319-335-1726
Dept: Purchasing
Email: julie-bergeon@uiowa.edu

Ship To: PCO-202-22 add
Description: Bergeon,Julie PCO 202
Address: The University of Iowa
Purchasing
PCO-202
125 S Dubuque St
Iowa City, IA 52242-2500
Phone: 319-335-1726
Fax:

End User: Julie Bergeon
Phone: 319-335-1726 add

Continue

The Requester(s) you have been approved to use will be listed in the drop-down menu next to **Requester**.

Click down arrow next to the **Requester** field and click on the Requester name that you want to use and it will populate the Requester information and corresponding Ship To information on the main screen.

Requester Information

Requester: Bergeon,Julie
HawkID: JBERGEON
Location: PCO-202-22
Phone: 319-335-1726
Dept: Purchasing
Email: julie-bergeon@uiowa.edu

Ship To: PCO-202-22 add
Description: Bergeon,Julie PCO 202
Address: The University of Iowa
Purchasing
PCO-202
125 S Dubuque St
Iowa City, IA 52242-2500
Phone: 319-335-1726
Fax:

End User: Julie Bergeon
Phone: 319-335-1726 add

Requester: This information is used to identify the person in the department who works directly with Purchasing and Accounts Payable to facilitate the procurement and payment process. Requesters may be contacted by Purchasing, Accounts Payable, or the vendor if a question arises regarding the Catalog Order.

Ship To Code: The Ship To Code fills in automatically according to the Requester you've selected. This code identifies the location to which the merchandise being ordered is to be sent.

End User Name: The End User is the member of your department requesting the good or services. These can be added to your Favorites by clicking the "add" link. Make sure to enter the phone number in the format shown, including area code. Once you add an End User, the system will default the previously entered information.

Ship To: PCO-202-22 add
Description: Bergeon,Julie PCO 202
Address: The University of Iowa
Purchasing
PCO-202
125 S Dubuque St
Iowa City, IA 52242-2500
Phone: 319-335-1726
Fax:

End User: Julie Bergeon
Phone: 319-335-1726 add

The MFK listed will default in on the Catalog Orders and can be changed if needed on the items panel.

Default MFK

050 05 0311 00000 50649100 6026 000 00000 60 0000

Catalog Access

SetID	Catalog	Description
UIOWA	UI_GEN_STORES	General Stores

Catalog Access: Requesters/Initiators must be assigned specific catalogs in order to be able to access the catalog and order the item in the catalog.

Click the Continue button to continue to the Item Search Page.

Item Search Page

Search QuickShop Add to Cart MiniCart: 0 item(s)

OrderBy Page Go to Shopping Cart Items Help I want to see 10 items per page.

Match any criteria

UI Item #: Description:
Manufacturer Name: Manuf Item ID:
Vendor Name: Vendor Item ID:
Vendor ID:
Category: Catalog:
Old Item ID: Alias:

Filter search by: Warehouse Vendor None

Search Clear Go to Shopping Cart Add to Shopping Cart

Collapse All Expand All UOM Expand All Mfg Info Expand All Vendors

No items found. 1

UI Item #	Vendor Item ID	Description	UOM Price	UOM	Manuf Name	Manuf Item ID	Sourcing from	Order Qty
Nothing found to display								

Collapse All Expand All UOM Expand All Mfg Info Expand All Vendors

OrderBy Page Go to Shopping Cart Add to Shopping Cart

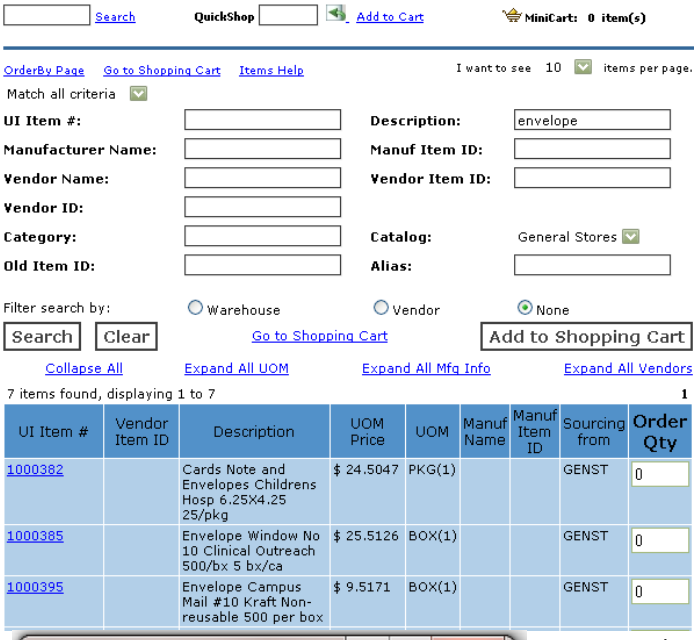
The first field is a global search which searches the description, manufacture name, manufacture item id, and vendor item id.

If the user knows the UI Item id, then you may type this in the **QuickShop** field and click Add to Cart. It will then be placed in your shopping cart. Click Go to Shopping Cart if you want view its contents.

On the item search page, you may search for items using many different criteria. You can narrow your search by putting information in multiple fields and using any or all match criteria in the drop-down. The default (Match any criteria) will result in items with at least one of the criteria typed. Selecting all will result in items with all criteria typed.

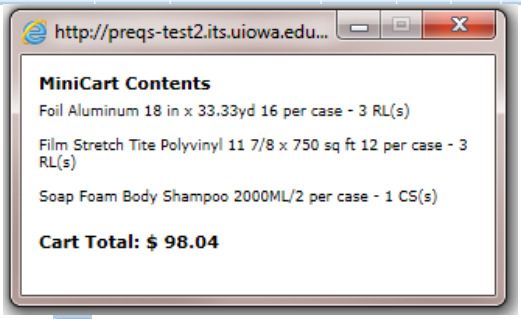
Match any criteria
Match any criteria
Match all criteria

You must select one field to search on. The search will find entries where your search is part of a word and will ignore capitalization.



In this example the search criteria is **Description**-*envelope* and **Catalog**-*GENST* (General Stores Catalog).

Type the desired **Order Qty** and click Add to Shopping Cart

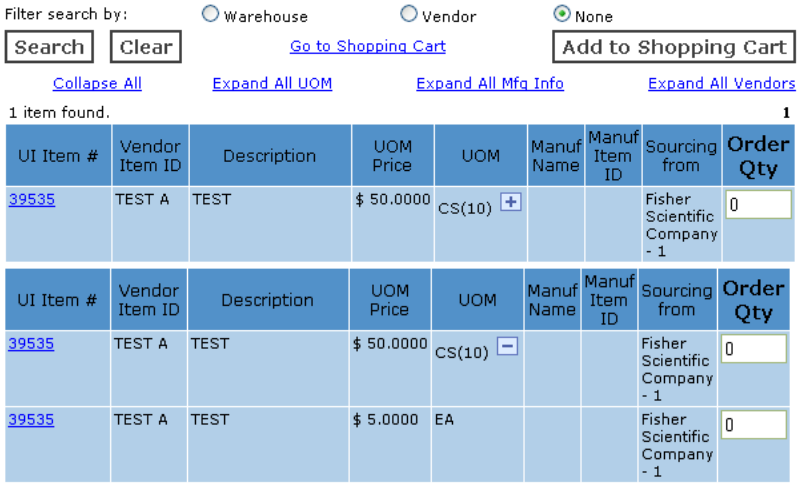


You may also click the **MiniCart:** at the top of the page to view your shopping cart's contents.

A pop-up window is displayed. Click the red X to close.

After you've selected all the items with their quantity, click on Go to Shopping Cart to complete your order at the top or bottom of the page. The system will take you to the Shopping Cart.

The [+] indicates that items have multiple UOM (units of measure), vendors, and manufacturer.

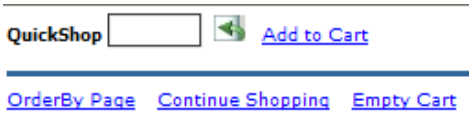


Click the [+] to open more options.

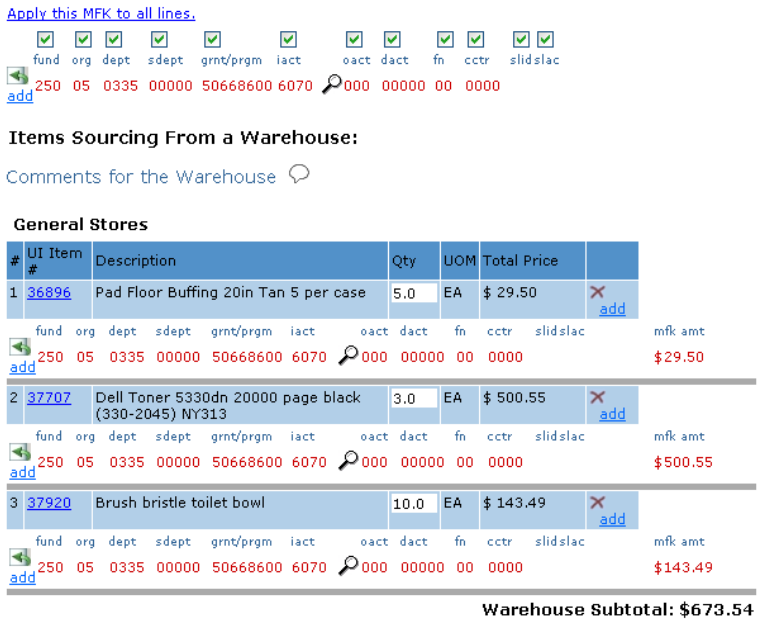
You may also use the links above the item list to expand all of a particular criteria and collapse all to close them.

Collapse All Expand All UOM Expand All Mfg Info Expand All Vendors

Shopping Cart – Catalog Order (Item Sourced to a Warehouse)



If you need to add another item click Continue Shopping or use **QuickShop**. You may also return to the **Order By** page or empty your cart.



You can still change MFK, quantity, or add the item to your favorites.

You can also change the MFK for all line items buy filling in the MFK and clicking "Apply this MFK to all lines" or only change selected numbers by un-checking the boxes.

You can add Warehouse comments by clicking this icon

Dots in balloon indicate there are comments noted

You may add any comments to the Warehouse for the Picklist.

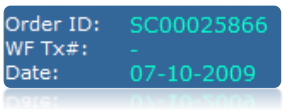
Click Return to Order

The last section of the Stock Request contains actions you take order. Save, validate or submit will assign a ten-digit number beginning with SC located on the sidebar in the upper left Order ID field.

Save: To save your order and finish later.

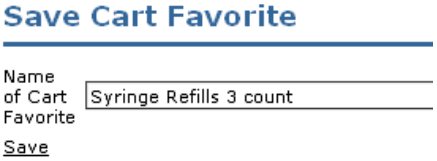
Validate: Your order will be checked and you will be prompted in red if there are any errors. You must correct any errors before you can "Submit".

Submit: Submits to PeopleSoft the stock items (items sourced from a warehouse) will become stock requests.



Cancel: Your order will be Cancelled.

Save as Favorite: If you'd like to save this order as a favorite, you'll be prompted to name the cart.



Save as Recurring: Allow users to set up orders which you place on a daily, weekly, monthly, or yearly basis.

Items Sourcing From a Warehouse -Stock ID 0000072980:

Comments for the Warehouse

General Stores

#	UI Item #	Description	Qty	UOM	Total Price	Status
1	30588	Bag Sani 1M per Case Use dispenser #05490	10.0	CA	$ 447.70	In Progress

fund	org	dept	sdept	grnt/prgm	iact	oact	dact	fn	cctr	slid	slac	mfk amt
050	05	0310	00000	50649100	6070	000	00000	60	0000			$447.70

College Of Dentistry Stores

#	UI Item #	Description	Qty	UOM	Total Price	Status
3	30596	Composite Filtek A2 Body 20/Pkg-3M/ESPE	3.0	PKG	$ 101.97	Cancelled

fund	org	dept	sdept	grnt/prgm	iact	oact	dact	fn	cctr	slid	slac	mfk amt
050	05	0310	00000	50649100	6070	000	00000	60	0000			$101.97

#	UI Item #	Description	Qty	UOM	Total Price	Status
4	30597	Impression Tray 1 large upper 12/pkg-coltene	2.0	PKG	$ 6.81	Complete

fund	org	dept	sdept	grnt/prgm	iact	oact	dact	fn	cctr	slid	slac	mfk amt
050	05	0310	00000	50649100	6070	000	00000	60	0000			$6.81

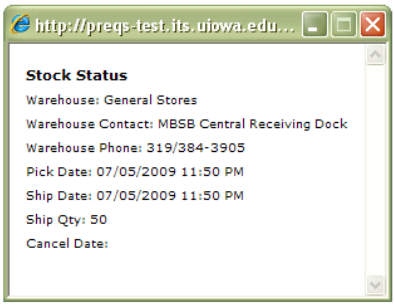
Warehouse Subtotal: $108.78

Submit will also assign a ten-digit Stock Request ID to the order for items sourced from a warehouse. The requester and initiator will get an email that the order has been created in PReqs with the Stock Request ID. They will also get an email when the order is completed and shipped.

Status are:

- **In Progress**-Item has not been sourced from warehouse
- **Complete**-Item has been sourced and will be shipped
- **Cancelled**-Item order cannot be filled and will require a new order to be submitted

If a line in the order has been partially filled or cancelled, the requester and initiator will receive an email stating this and the line item will need to be re-ordered.



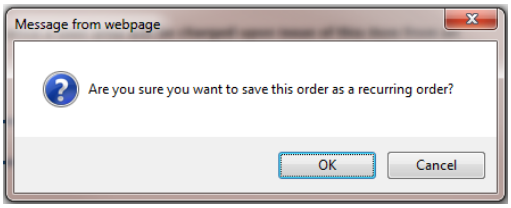
Clicking on **Complete** link will show warehouse information, Pick Date, and Ship Date.

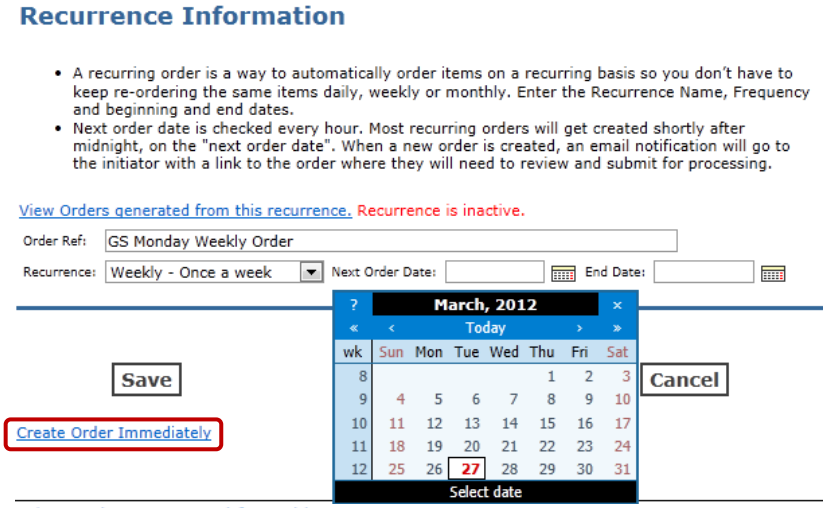
Clicking on **Cancelled** will show you the cancelled date.

Recurring Orders

The system will generate your daily, weekly, monthly, or yearly orders and email you when it is ready to be submitted. The order will not be sent to the Vendor or UI Stores until you review and click **Submit**. Recurrences set up to begin on the present date will be created within an hour. Orders set up for a future date will be created at 12M on that day.

Once you have items in your shopping cart, you have the option of saving it as a recurring order. Click Save as Recurring. The system will verify if you want to initiate this. Click OK.





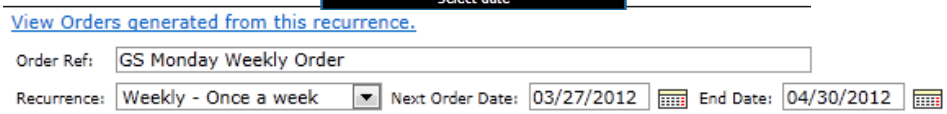
The Recurrence is not active until you enter an Order Reference name, frequency, and beginning/end date.

Save will save the Recurrence and make it Active. When you receive an email that the order was created, you will still need to validate the order (MFK) and Submit.

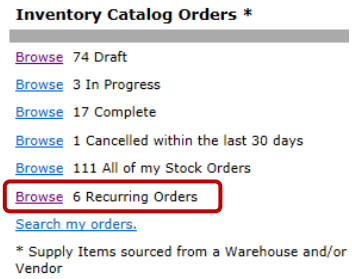
Validate will validate and save the Recurrence and make it Active. Once you receive an email that the order was created, simply click the SC# and submit the order.

Cancel will cancel the recurrence if you decide a recurrence isn't needed.

If you don't wish to wait for the next order date, you may click the link to create it immediately.



This Recurring Order is now active and will display in your Recurring Order Center from your Home Page.

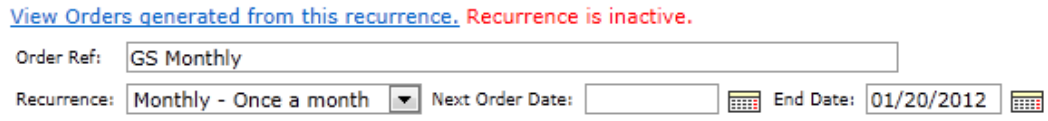


Recurring Order Center

Order #	Next Order Date	Recurrence	Order Ref	Status	Total	End Date	Delete
RC00212315		MONTHLY	GS Monthly	Inactive	$ 49.36	2012-01-20	Delete
RC00212317		DAILY	Dent Stores Daily	Inactive	$ 0.00	2012-01-20	Delete
RC00212654	2012-04-03	WEEKLY	GS Monday Weekly Order	Active	$ 98.04	2012-04-30	Delete

At any time you wish to discontinue the Recurring Orders, simply click the **Delete** link.

After the last recurrance (End Date), the order will be come inactive. Click the RC# to modify it.

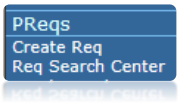


Enter a new **Next Order** and **End Date** Next Order Date: 03/30/2012 End Date: 04/27/2012 and click **Save** or **Validate**.

If you wish to create a bi-weekly recurring order, add the items to your cart and create the Recurring Order. Set up the first RC for Weekly, every Monday. Click **Copy Order** under **PReqs** on the Sidebar, then set the second order up for Weekly, every Wednesday

Shopping Cart – Catalog Order (Shopping Cart Favorites)

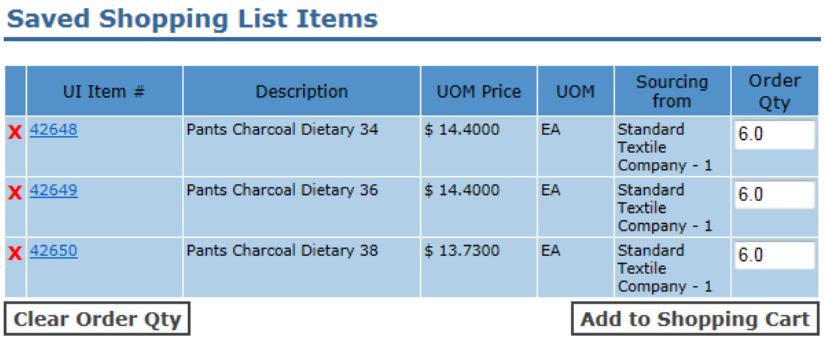
Click on the **Create Req** link in the side bar area and you'll get the Order By screen below.



For orders you've previously saved as a favorite, you'll begin the same way on the Order By page. Verify the **Requester, Ship to**, and **End User** Information. Click the link **Shopping Cart Favorites**.

A list of your **Saved Shopping Lists** will display.

You may select the cart name or remove from your list.

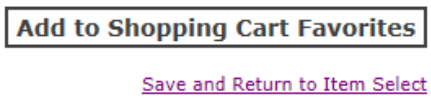


Your items and quantities are saved in the Favorites.

You may change the quantities, delete and/or **Add to Shopping Cart**.

You may even add items to an existing cart Favorite by clicking **Add Items**.

You'll return to the Item Search Page to find and add the additional items. Click **Add to Shopping Cart Favorites** then click **Save and Return to Item Select**.



	UI Item #	Description	UOM Price	UOM	Sourcing from	Order Qty
X	42648	Pants Charcoal Dietary 34	$ 14.4000	EA	Standard Textile Company - 1	6.0
X	42649	Pants Charcoal Dietary 36	$ 14.4000	EA	Standard Textile Company - 1	6.0
X	42650	Pants Charcoal Dietary 38	$ 13.7300	EA	Standard Textile Company - 1	6.0
X	42651	Pants Charcoal Dietary 40	$ 15.4600	EA	Standard Textile Company - 1	3.0

New Item(s) added…

QuickShop Add to Cart

OrderBy Page | Continue Shopping | Empty Cart

Receiver Information

Receiver: Phone:
HawkID: add Dept:
Location: Email:

Apply this MFK to all lines.

fund	org	dept	sdept	grnt/prgm	iact	oact	dact	fn	cctr	slid	slac
050	05	0310	00000	50649100	6085	000	00000	31	0000		

Items Sourcing From a Vendor:

Header Comments that will default to all lines

Standard Textile Company More Info

Business Justification for This Purchase:

#	UI Item #	Description	Qty	UOM	Total Price	
1	42640	Pants Scrub Jade Green 5XLarge	3.0	CA	$ 666.72	add
	fund	org	dept	sdept	grnt/prgm	iact	oact	dact	fn	cctr	slid	slac	mfk amt
	050	05	0310	00000	50649100	6085	000	00000	31	0000			$666.72
Line Comments	Insp. Required ID	Inspection Not Required	Confirming Order	No	Due Date	04/03/2013							
2	42641	Shirt Scrub Jade Green 5XLarge	3.0	CA	$ 550.80	add							
	050	05	0310	00000	50649100	6085	000	00000	31	0000			$550.80
Line Comments	Insp. Required ID	Inspection Not Required	Confirming Order	No	Due Date	04/03/2013							
3	42648	Pants Charcoal Dietary 34	3.0	EA	$ 43.20	add							
	050	05	0310	00000	50649100	6085	000	00000	31	0000			$43.20
Line Comments	Insp. Required ID	Inspection Not Required	Confirming Order	No	Due Date	04/28/2013							

Save | Validate | Submit | Cancel

Save as Favorite Save as Recurring

Your order is displayed.

You can still change MFK and quantity.

Add comments by clicking the icon.

It will be necessary to add a receiver, even if it isn't required to receive on the items.

You will be required to enter a Business Justification for the order(s).

Save, **Validate, Submit,** and/or **Cancel** your Shopping Cart.

Submit will also assigns a Stock Request ID to the catalog order for items sourced from a warehouse. The requester and initiator will receive an email with the Stock Request ID.

Search Center

Order Search Center

Note:
Search entries are case in-sensitive. Using 'Equal To' with 'foo,bar' will find 'Foo,Bar', 'FOO,BAR', etc.
You may use wildcards '*' on search entries. For Order ID, using 'Like' with '*10' will find IDs ending in 10 such as 'SC000010', or 'S0056110'. Using 'Like' with '*10*' will find IDs having 10 in them such as 'SC000105', or 'SC561108'.

Search

SC Order ID	Equal To		
Stock ID	Equal To		
eBuy Shopping Cart ID	Equal To		
eBuy Shopping Cart Name	Equal To		
eBuy Catalog Num	Equal To		
Recurrence ID	Like		
Order Date	Equal To		
SC Order Status	Equal To		
Initiator (HawkID)	Equal To		
Requester Code	Equal To		
Requester Name	Equal To		
Ship To	Equal To		
End User	Equal To		
Contract ID	Equal To		
Vendor ID	Like		
Vendor Name	Like		
Item ID	Equal To		

The Search Center is granted by your workflow administrator. You can search for Catalog Orders using many different criteria on this page.

You can narrow the search by putting information in multiple fields.

SC Order ID is the number assigned to the Catalog Order.

Stock ID is the number assigned to Items sourced from a warehouse.

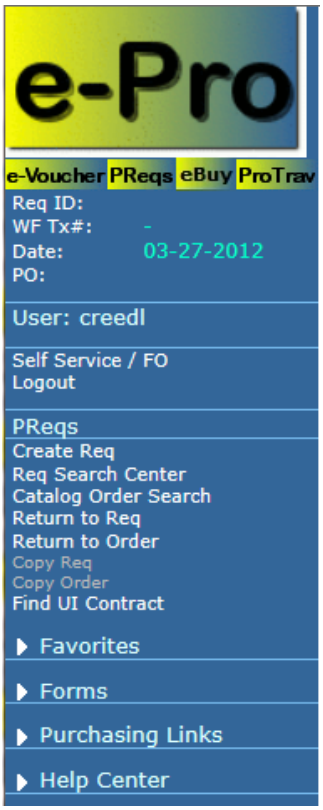
Search Center Results

26 Orders found.

Order #	Order Date	Initiator	End User	Stock #	Status	Order Amt	Description	Campus Wide Contract
SC00212536	2012-03-01	camjones	Test		Draft	$ 17.07	Gloves Latex Exam Powder Free	No
SC00212537	2012-03-01	jbergeon	Jamie Hachmeister		Draft	$ 62.91	Dispenser Toilet Tissue Jumbo	No
SC00212538	2012-03-01	jkeiser	Julie Bergeon		Draft	$ 3.34	Bag Urinary Drainage Leg Bag C	No
SC00212539	2012-03-02	camjones	Test		Draft	$ 1,364.68	Paper Astrobright Celestial Bl	No
SC00212540	2012-03-02	camjones	Test		Draft	$ 17.07	Gloves Latex Exam Powder Free	No
SC00212541	2012-03-02	jbergeon	Jamie Hachmeister		Draft	$ 291.30	ACID SULFURIC 2.5 LITER 6 CS	No

After you have the information in the fields you want to search on, click on **Search** at the top left of the Search Center page. A list of the requisitions that met the criteria you entered will be displayed.

Click on the **Order #** if you want to see the catalog order.



PReq Sidebar

The side on the PReq contains information about the Req and some links.

Req ID: Is located on the sidebar at the top. A 10-digit number that begins with a W. The PReqs system electronically assigns the number after the Initiator saves or validates a requisition.

WFTx#: Is located on the sidebar at the top. This is the Workflow transaction number that is assigned by workflow for tracking purposes.

Date: Is located on the sidebar at the top. This is the date the requisition was created.

PO: Is located on the sidebar at the top. A 10 digit number that begins with a 1 or B. This number is electronically assigned in the PReqs System after the last workflow approval.

PReqs

Create Req: Requisitions going to outside vendors only.

Req Search Center: Located on the sidebar, click on Search Center to find Requisitions. Granted by workflow administrator.

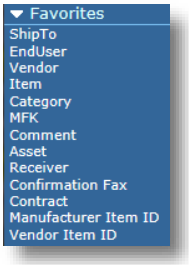
Order (catalog) Search Center: Located on the sidebar, click on Search Center to find Catalog Orders. Granted by workflow administrator.

Return to Order: Takes the user to the main Order entry page.

Copy Req: Brings up an established Req you would like copied. Click Copy Req on the side bar. The information from the Req will be populated in a new record. Make any changes needed and send to workflow.

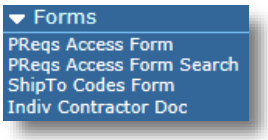
Copy Order: Brings up established Catalog order you would like copied. Click Copy Order on the side bar. The information from the Order will be populated in a new record. Make any changes needed and send to workflow.

Find UI Contract: Search for established University Contracts by Vendor, Category, or Products/Services.



Favorites - Frequently used information.

Forms



PReq Access: Requesters link to add initiators

PReq Access Search: Requesters link to search for initiator request status

Ship to Codes: Request to add, change, or delete a Ship to code

Indiv Contractor Doc: Payroll form link to pay contractors

Purchasing Links

Purchasing Contracts: University of Iowa contracts are considered a primary tool for the departments to receive the best pricing and quality. Contact Purchasing Agents if you have questions.

Bids Opportunities: Currently Active Bids

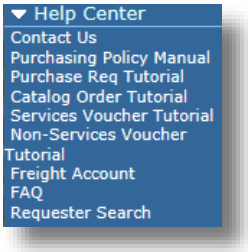
Iowa Prison Industries: Web site showing Iowa Prison Industries Items.

Targeted Small Business: System providing State of Iowa certified Targeted Small Businesses with advance notice of procurement opportunities.

Subagreements: Division of Sponsored Programs web site to help users with subagreements.

e-forms: Electronic forms web site.

Help Center



Contact us: Informational page for questions

Purchasing Policy Manual: Link to manual with guidelines

PReqs Initiator Tutorial: Document for requesters and initiators

Catalog Order Tutorial: Document for requesters and initiators for use of catalog orders

Services Voucher Tutorial: Document for help with services e-vouchers (payroll)

Non-Services Voucher: Document for help with non-services e-vouchers

Freight Account: Learn how getting a Freight account can save you money.

FAQ: Frequently asked questions regarding PReqs and e-Vouchers

Requester Search: This search will look in the Requester Code, Requestor Name, Location, and Department Name fields