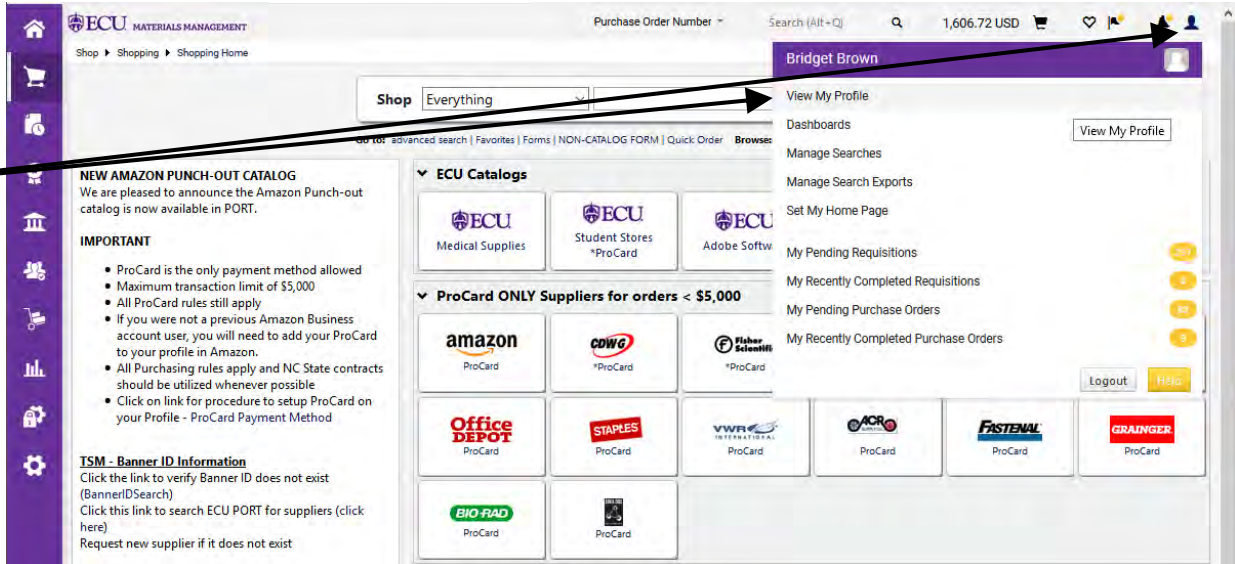
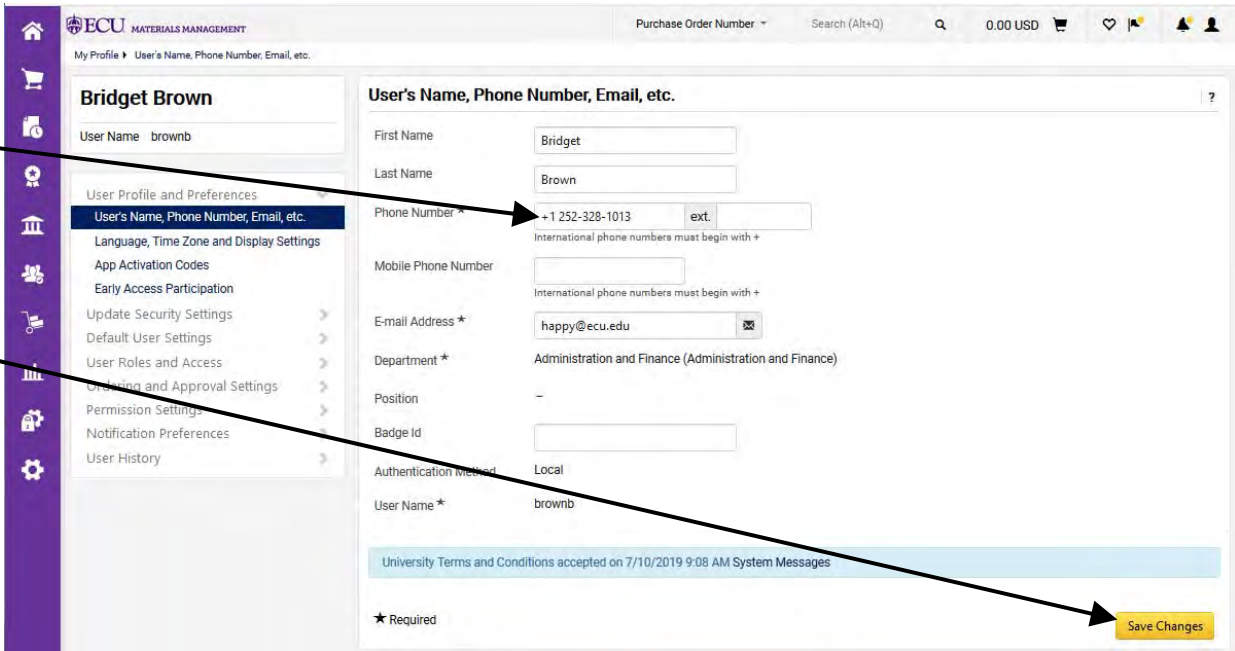


USER PROFILE EDITS

Last Updated on: 4/1/2020



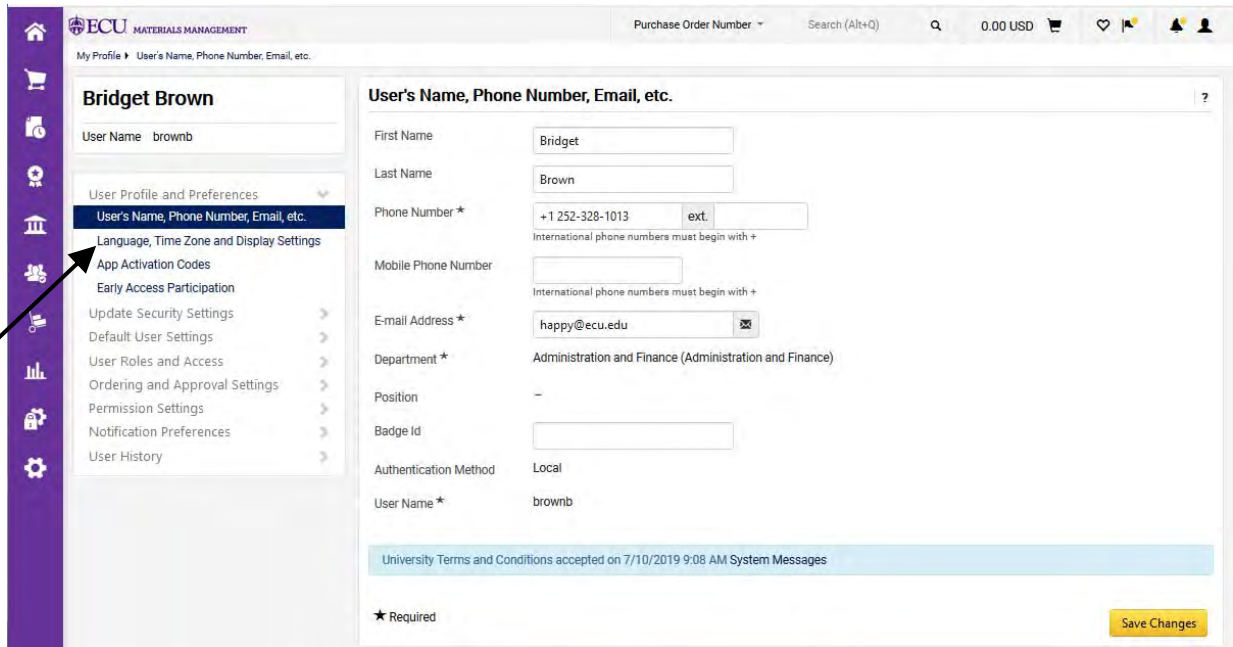
1. Click on the **User** icon in the top right corner and select **View My Profile** from fly-out menu.



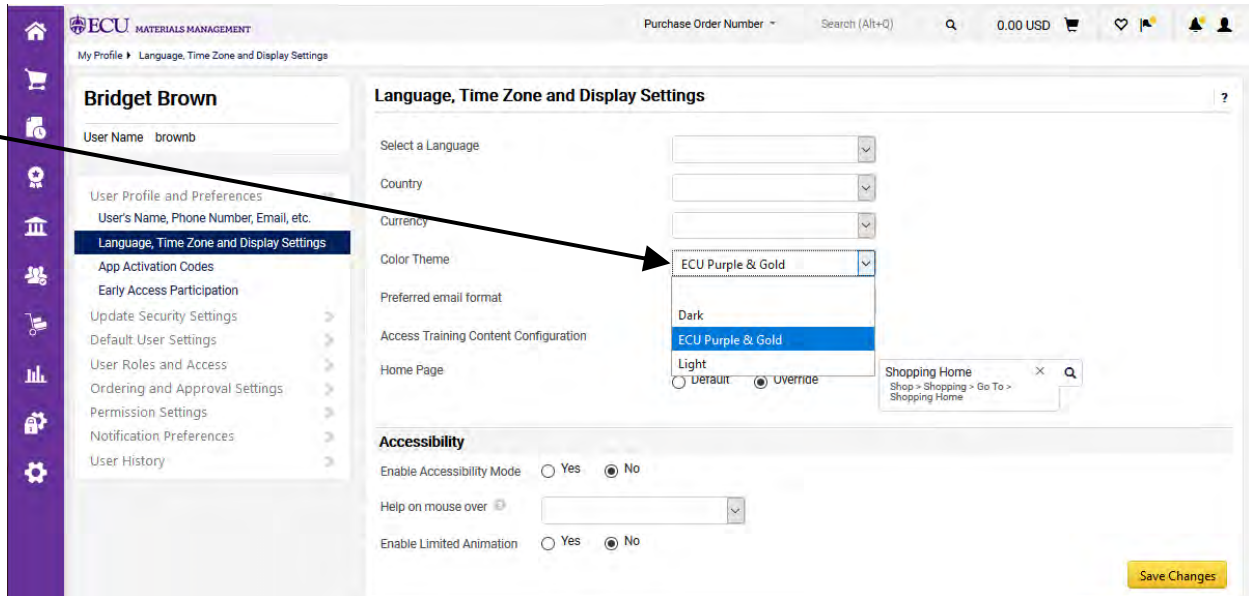
2. Enter **Area Code** and **Phone #** in the corresponding box.
3. Click **Save Changes** button. **IMPORTANT NOTE:** If you change departments / divisions, it is **critical** that you submit a new Banner Security Form indicating any change with your roles and Organization permissions. Once the security form has been completed and approved, you will also need to update your User Profile information for FOAPAL Codes and Ship Codes. See the FOAPAL Code and Ship Code procedures for completing those tasks.

USER PROFILE COLOR THEME

Last Updated on: 4/01/2020



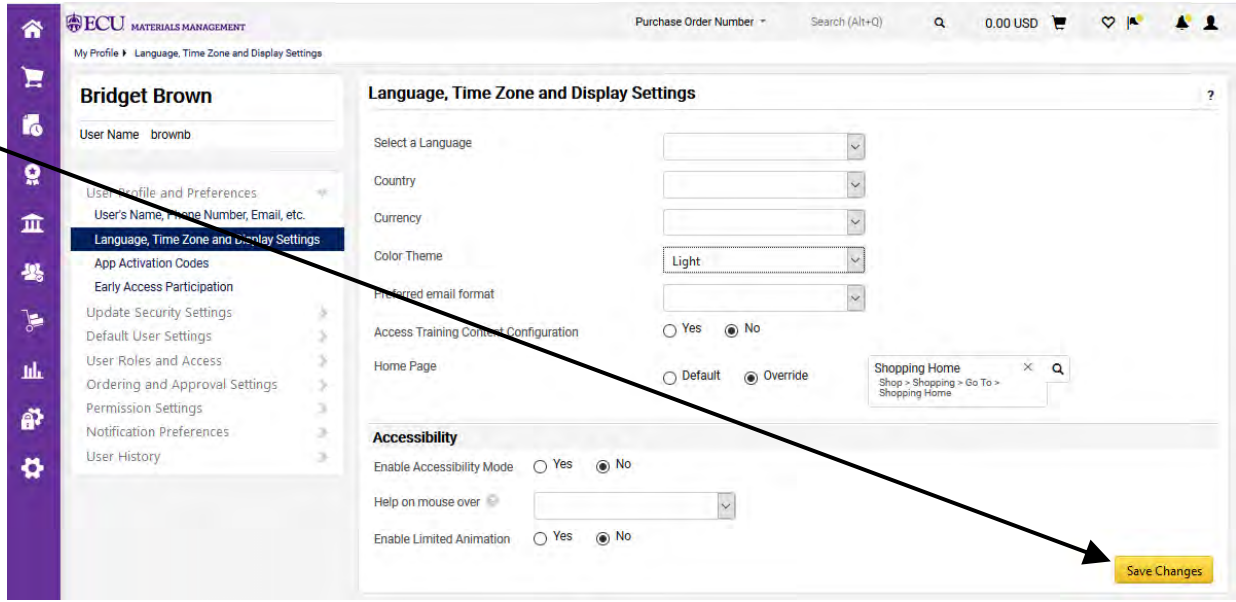
1. Click on **Language, Time Zone and Display Settings** link.



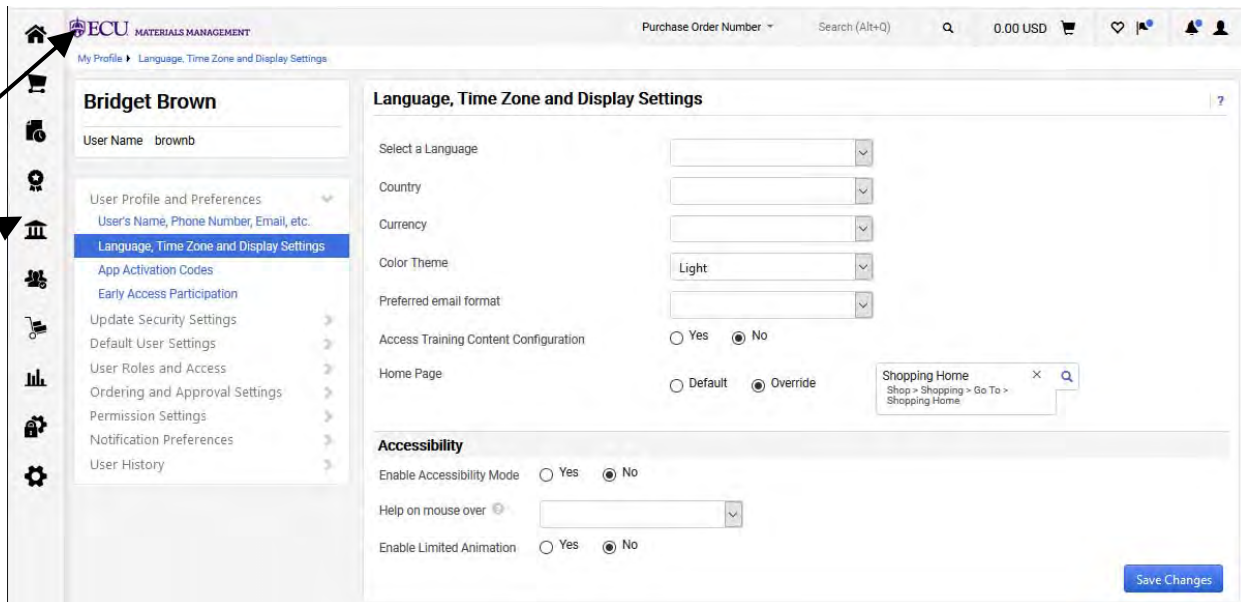
2. Click the drop down for **Color Theme** to select another theme. **Note:** The default setting is **ECU Purple and Gold**.

USER PROFILE COLOR THEME

Last Updated on: 4/01/2020



3. After selecting a different theme, click **Save Changes** button.

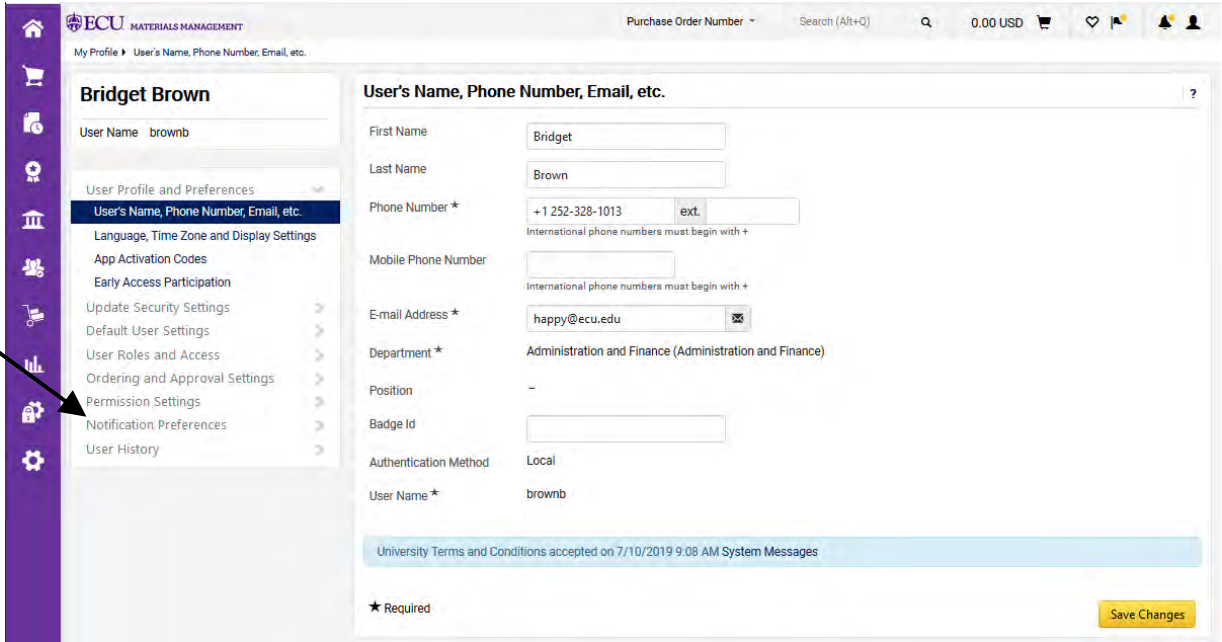


4. The color theme changed because of the update.

5. This completes the steps for this procedure. Click on the **ECU** icon to return to the home page.

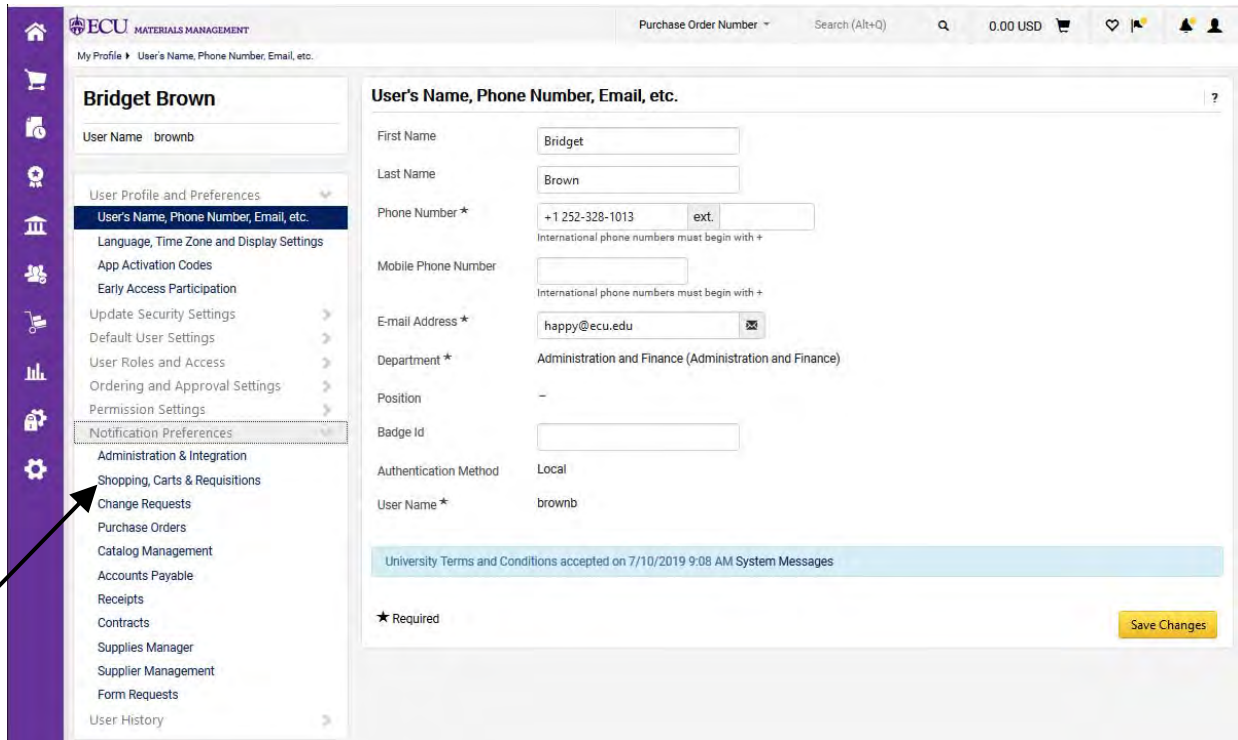
USER PROFILE EMAIL PREFERENCES

Last Updated on: 4/01/2020



The screenshot shows the 'User Profile' page for Bridget Brown. The left sidebar contains a list of navigation links. The 'Notification Preferences' link is highlighted in blue. A box with the number '1.' and an arrow points to this link. The main content area shows the 'User's Name, Phone Number, Email, etc.' section with various input fields for personal information.

1. Click on **Notification Preferences** link.

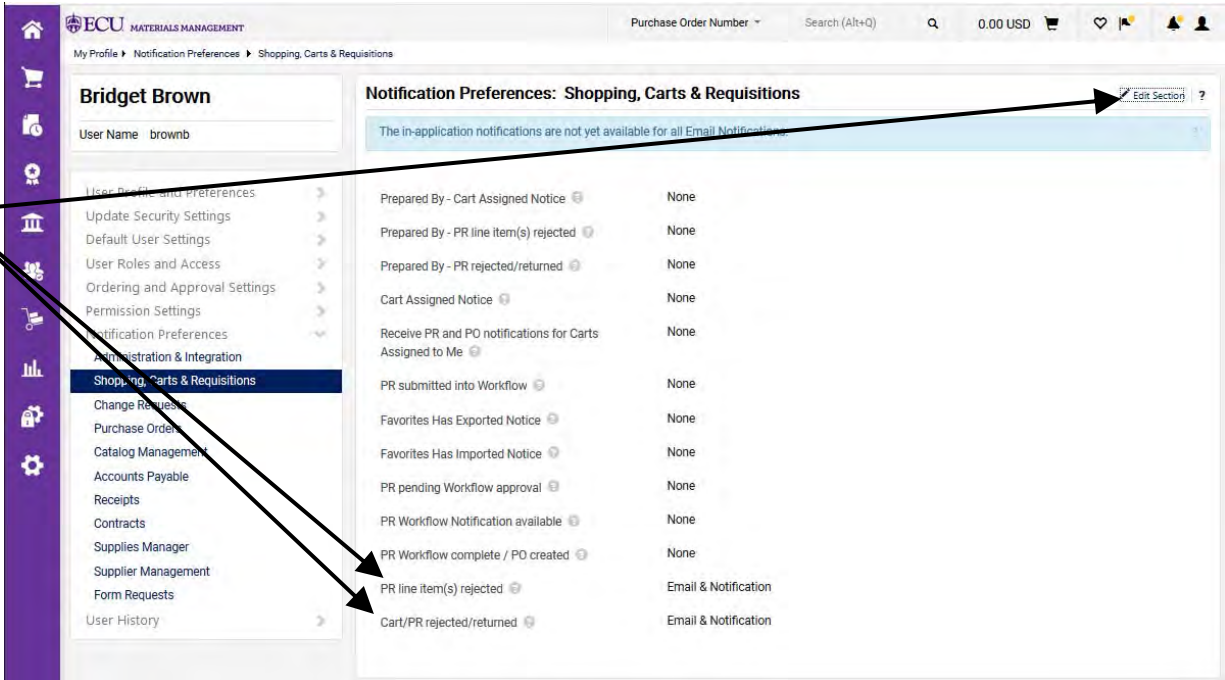


The screenshot shows the 'User Profile' page for Bridget Brown. The left sidebar is expanded to show sub-sections under 'Notification Preferences'. The 'Shopping, Carts & Requisitions' sub-section is highlighted in blue. A box with the number '2.' and an arrow points to this sub-section. The main content area remains the same as in the previous screenshot.

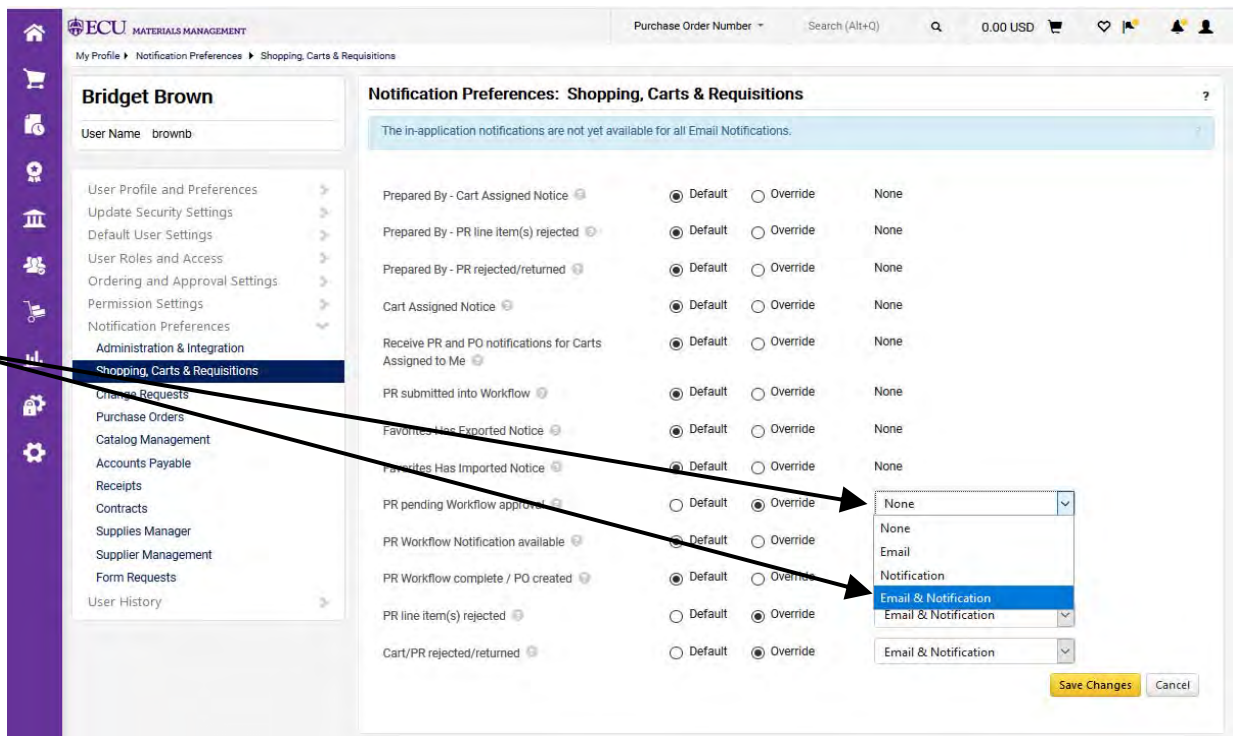
2. From here, you can select any of the sub-sections of **Notification Preferences**. For this example, we will select **Shopping Carts & Requisitions**.

USER PROFILE EMAIL PREFERENCES

Last Updated on: 4/01/2020



3. The following 6 events are automatically set to trigger **Email Preferences**: PR line item (s) rejected, PR rejected, PO line item rejected, PO rejected, PO sent to supplier, and Contact Date Notifications (not displayed in above screenshot – select **Purchase Orders** sub-section to view). Click **Edit Section**.



4. Click on **PR pending Workflow approval** combo box and select **Email & Notification** option. This is recommended for Division Approvers to receive emails and notifications for requisitions that are pending your approval. **Note:** You can also reverse these steps to remove an email notification.

USER PROFILE EMAIL PREFERENCES

Last Updated on: 4/01/2020

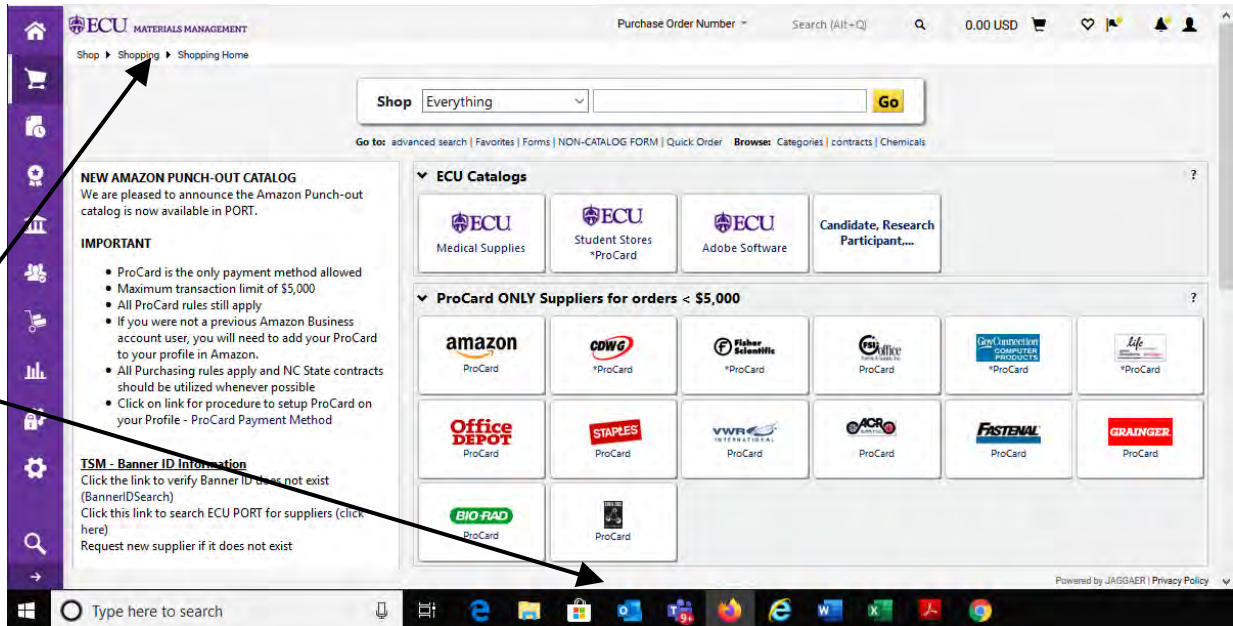
The screenshot displays the 'Notification Preferences: Shopping, Carts & Requisitions' page for user Bridget Brown. The page features a left sidebar with navigation options, a main content area with notification settings, and a 'Save Changes' button. Callout boxes 5 and 6 point to the 'Save Changes' button and the ECU logo respectively.

Notification Type	Default	Override	None
Prepared By - Cart Assigned Notice	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Prepared By - PR line item(s) rejected	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Prepared By - PR rejected/returned	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cart Assigned Notice	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Receive PR and PO notifications for Carts Assigned to Me	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
PR submitted into Workflow	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Favorites Has Exported Notice	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Favorites Has Imported Notice	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
PR pending Workflow approval	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
PR Workflow Notification available	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
PR Workflow complete / PO created	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
PR line item(s) rejected	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Cart/PR rejected/returned	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

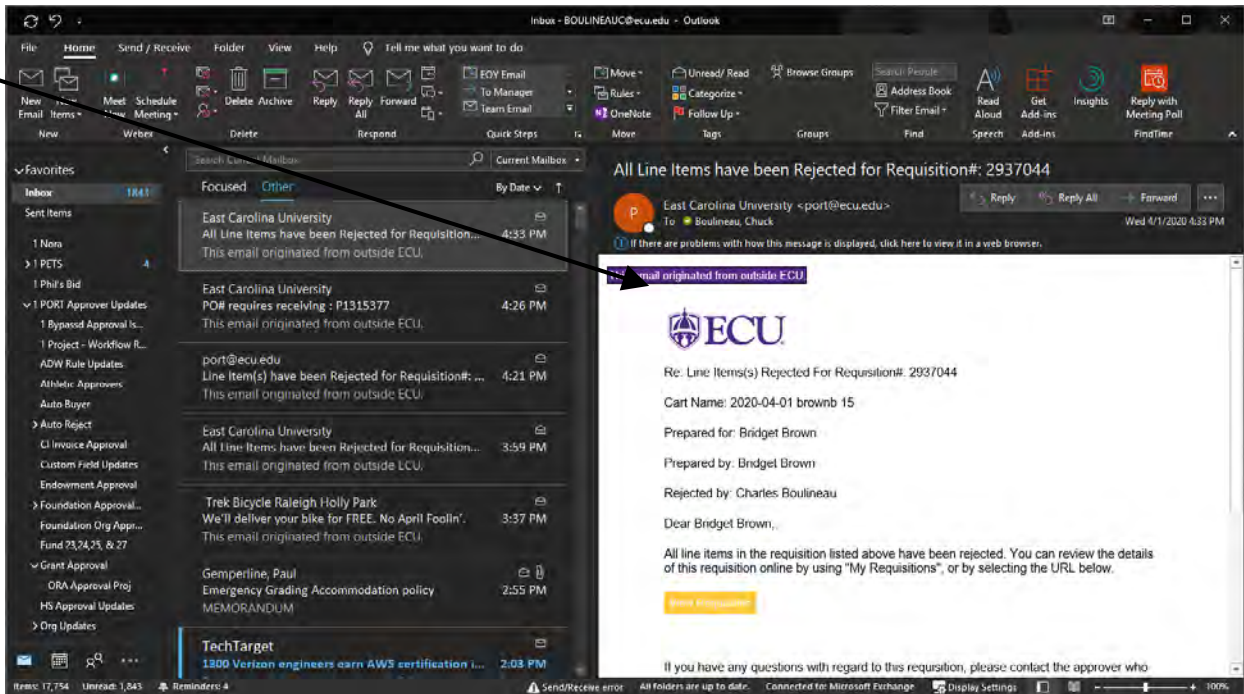
5. Click **Save Changes** button to update the event for notifications on your profile.
6. This completes the steps for this procedure. Click on the **ECU** icon to return to the home page.

USER PROFILE – USING EMAIL NOTIFICATIONS

Last Updated on: 4/01/2020



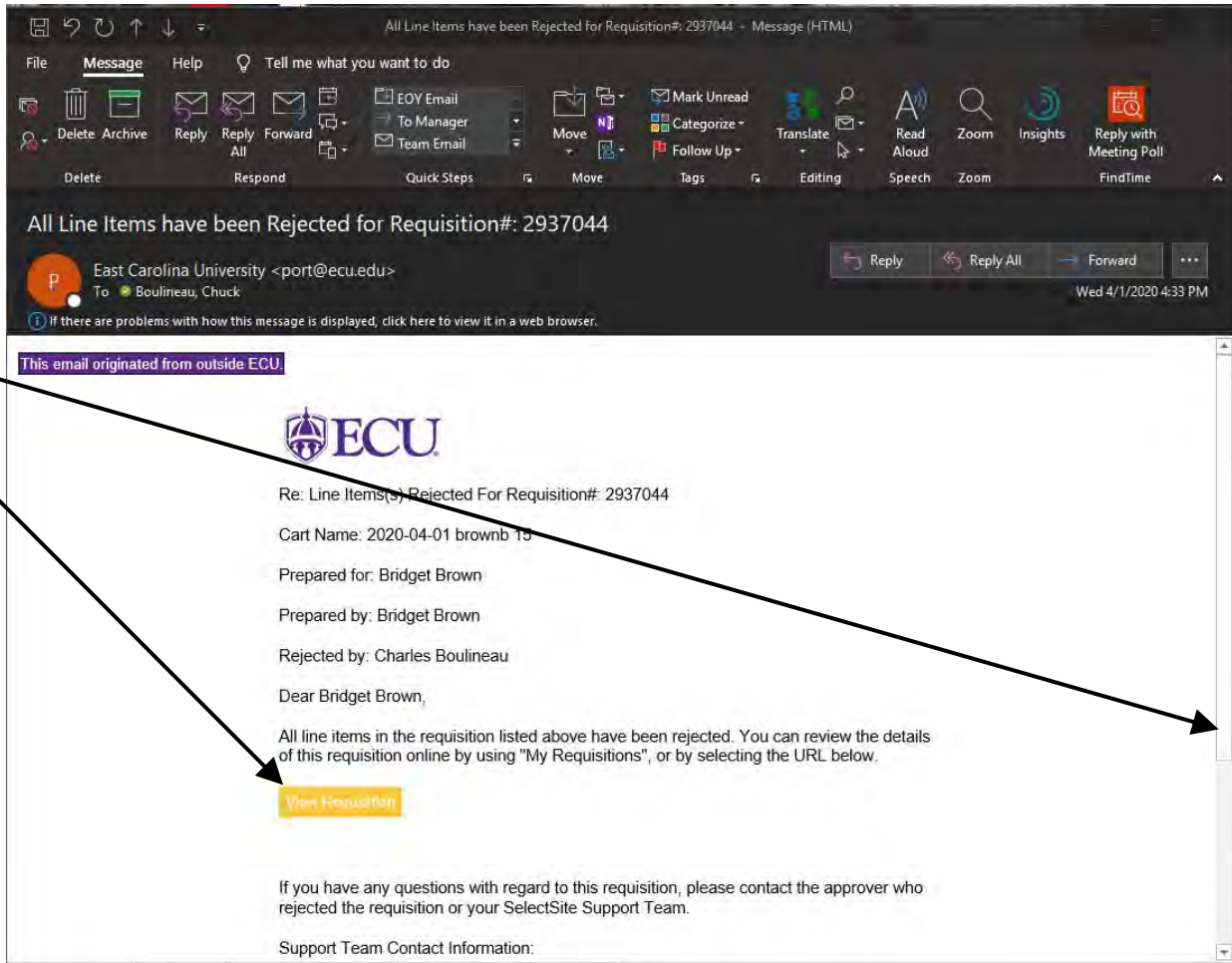
1. To utilize the email notifications in PORT, you must be logged into PORT with your default browser.
Note: For the email notification to work, the PORT browser must be the last browser window opened.
2. Click on **Outlook** to view the email notification.



3. Double-click the email to view the notification.

USER PROFILE – USING EMAIL NOTIFICATIONS

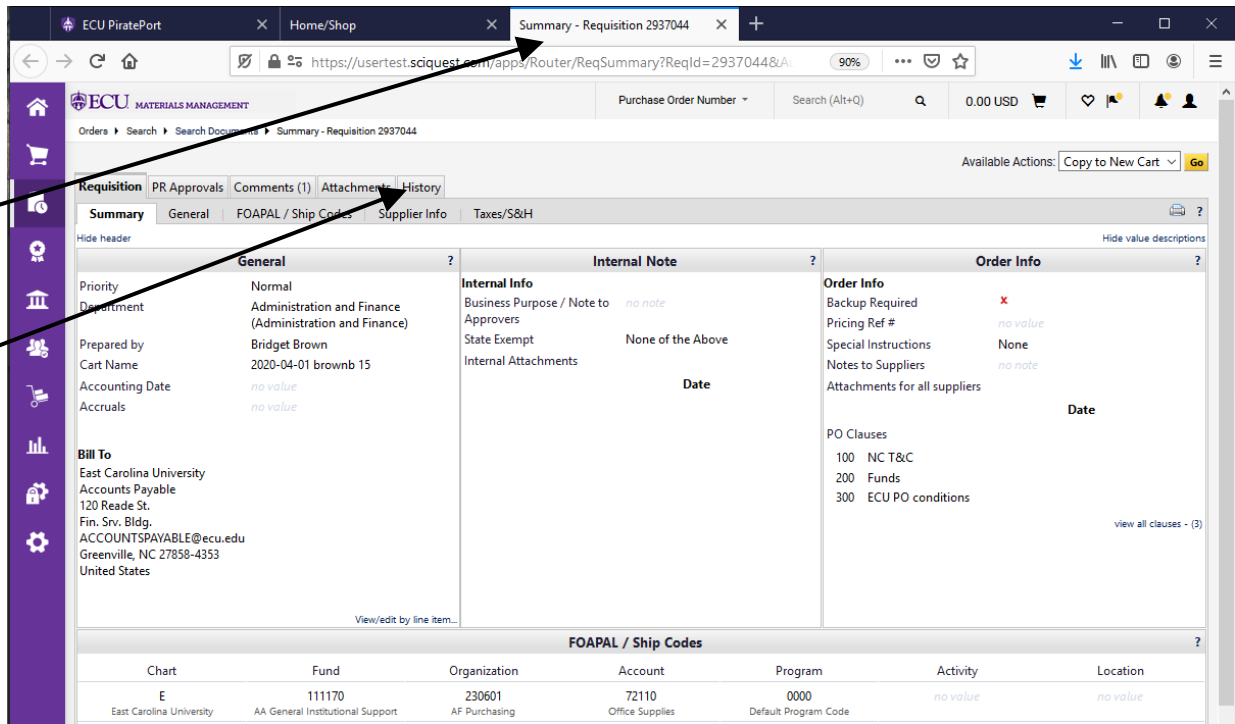
Last Updated on: 4/01/2020



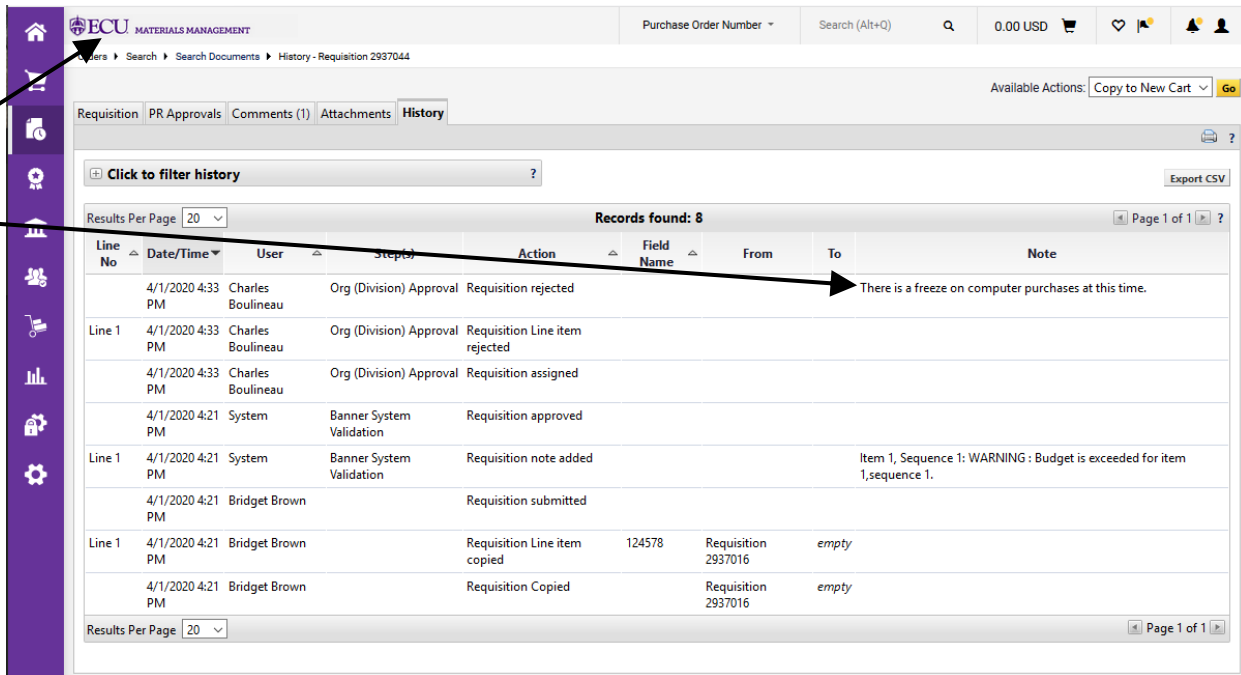
4. Double-click on **View Requisition** button to go requisition in PORT.
5. If email notification is the result of a document rejection, you may need to scroll to bottom of email to see rejection reason.

USER PROFILE – USING EMAIL NOTIFICATIONS

Last Updated on: 4/01/2020



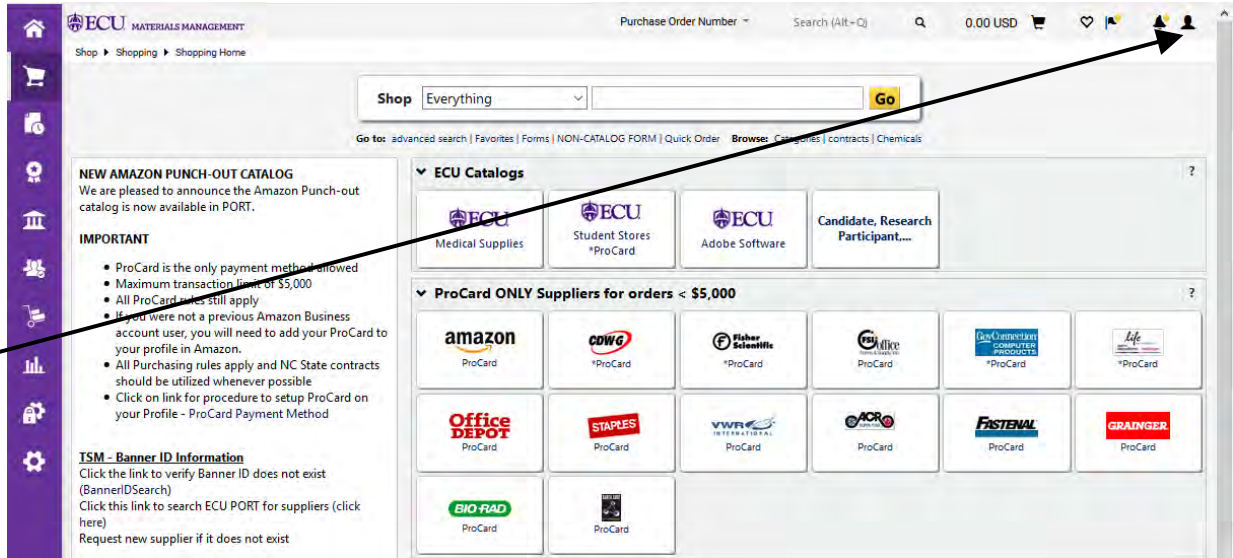
6. This will open a new tab or browser to the document in PORT that triggered your email notification.
7. Click on **History** tab to determine the reason the document was rejected.



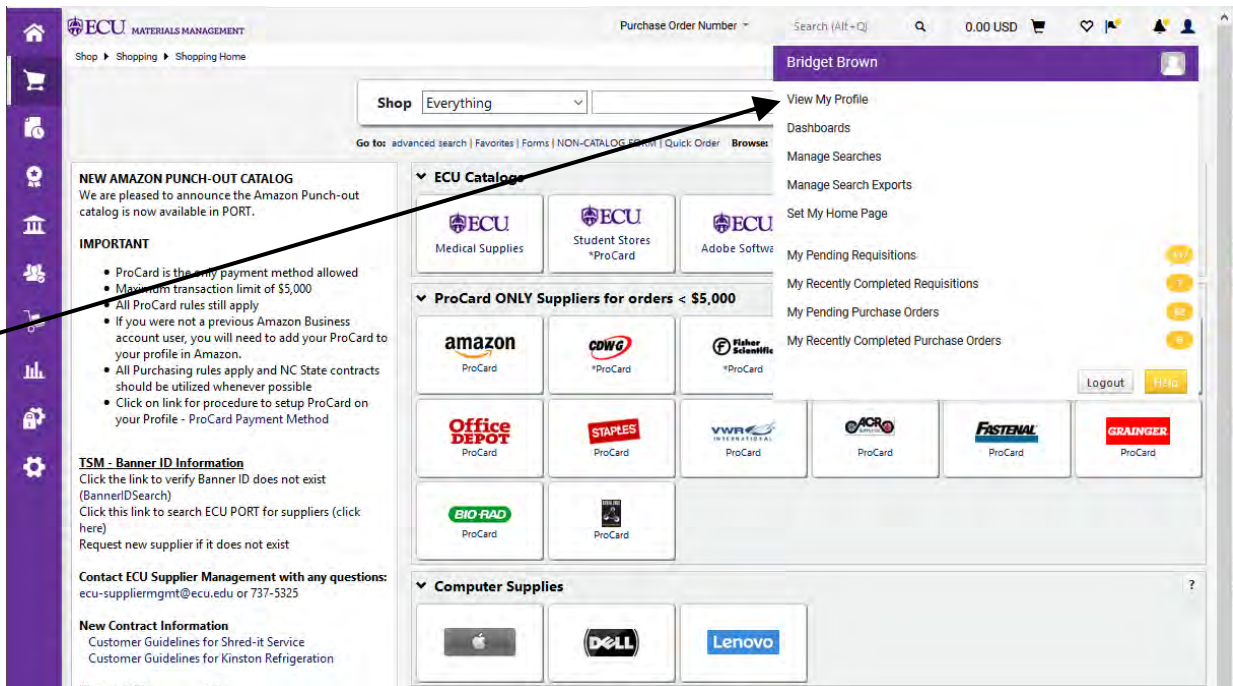
8. See note in history for the reason this document was rejected.
9. This completes the steps for this procedure. Click on the **ECU** icon to return to the home page.

FOAPAL CODE EDITS

Last Updated on: 4/01/2020



1. Click on **User** icon.



2. From fly-out menu, select **View My Profile**.

FOAPAL CODE EDITS

Last Updated on: 4/01/2020

ECU MATERIALS MANAGEMENT

Purchase Order Number Search (Alt+Q) 0.00 USD

My Profile User's Name, Phone Number, Email, etc.

Bridget Brown

User Name brownb

User Profile and Preferences

User's Name, Phone Number, Email, etc.

Language, Time Zone and Display Settings

App Activation Codes

Early Access Participation

Update Security Settings

Default User Settings

User Roles and Access

Ordering and Approval Settings

Permission Settings

Notification Preferences

User History

User's Name, Phone Number, Email, etc.

First Name Bridget

Last Name Brown

Phone Number * +1 252-328-1013 ext. International phone numbers must begin with +

Mobile Phone Number International phone numbers must begin with +

E-mail Address * boulineauc@ecu.edu

Department * Administration and Finance (Administration and Finance)

Position -

Badge Id

Authentication Method Local

User Name * brownb

University Terms and Conditions accepted on 7/10/2019 9:08 AM System Messages

★ Required Save Changes

3. Click on **Default User Settings** link.

ECU MATERIALS MANAGEMENT

Purchase Order Number Search (Alt+Q) 0.00 USD

My Profile User's Name, Phone Number, Email, etc.

Bridget Brown

User Name brownb

User Profile and Preferences

User's Name, Phone Number, Email, etc.

Language, Time Zone and Display Settings

App Activation Codes

Early Access Participation

Update Security Settings

Default User Settings

Custom Field and Accounting Code Defaults

Default Addresses

Checkout Settings

Chemical Location Defaults

User Roles and Access

Ordering and Approval Settings

Permission Settings

Notification Preferences

User History

User's Name, Phone Number, Email, etc.

First Name Bridget

Last Name Brown

Phone Number * +1 252-328-1013 ext. International phone numbers must begin with +

Mobile Phone Number International phone numbers must begin with +

E-mail Address * boulineauc@ecu.edu

Department * Administration and Finance (Administration and Finance)

Position -

Badge Id

Authentication Method Local

User Name * brownb

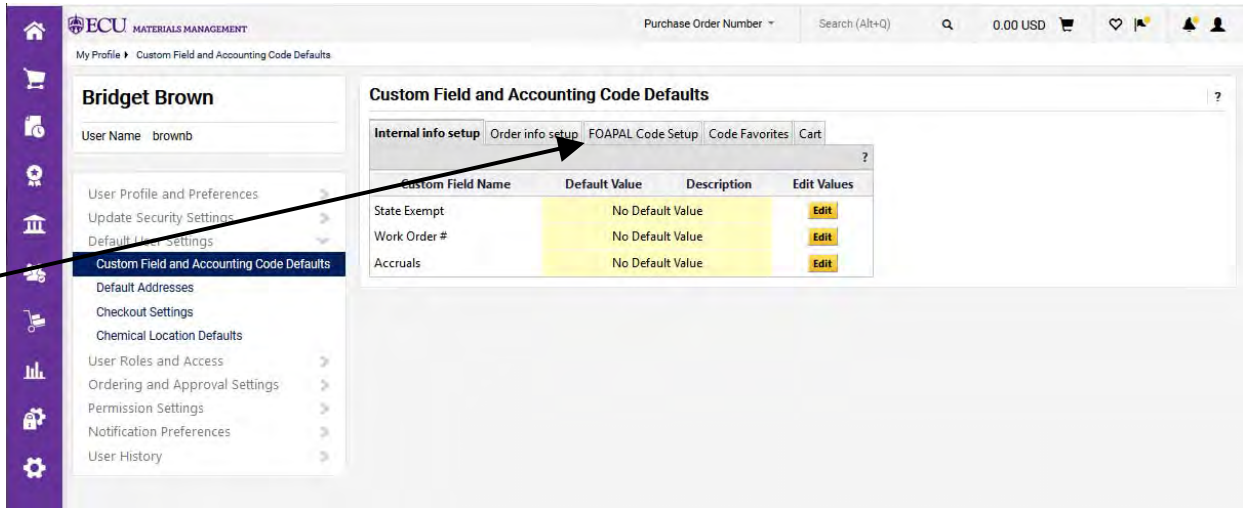
University Terms and Conditions accepted on 7/10/2019 9:08 AM System Messages

★ Required Save Changes

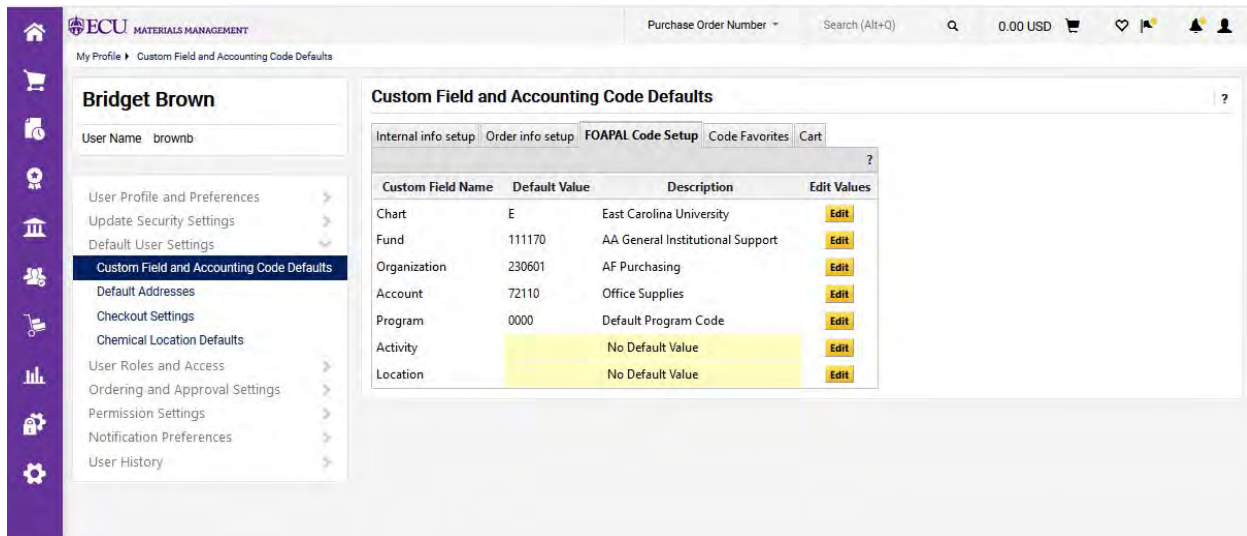
4. Click on the **Custom Field and Accounting Code Defaults** link.

FOAPAL CODE EDITS

Last Updated on: 4/01/2020



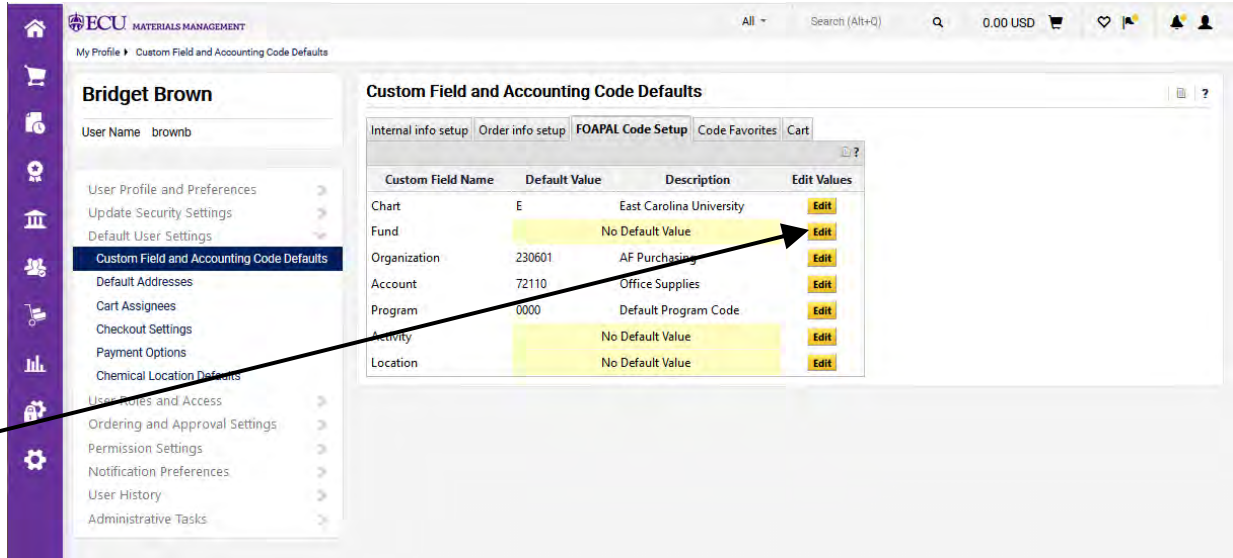
5. Click on **FOAPAL Code Setup** tab.



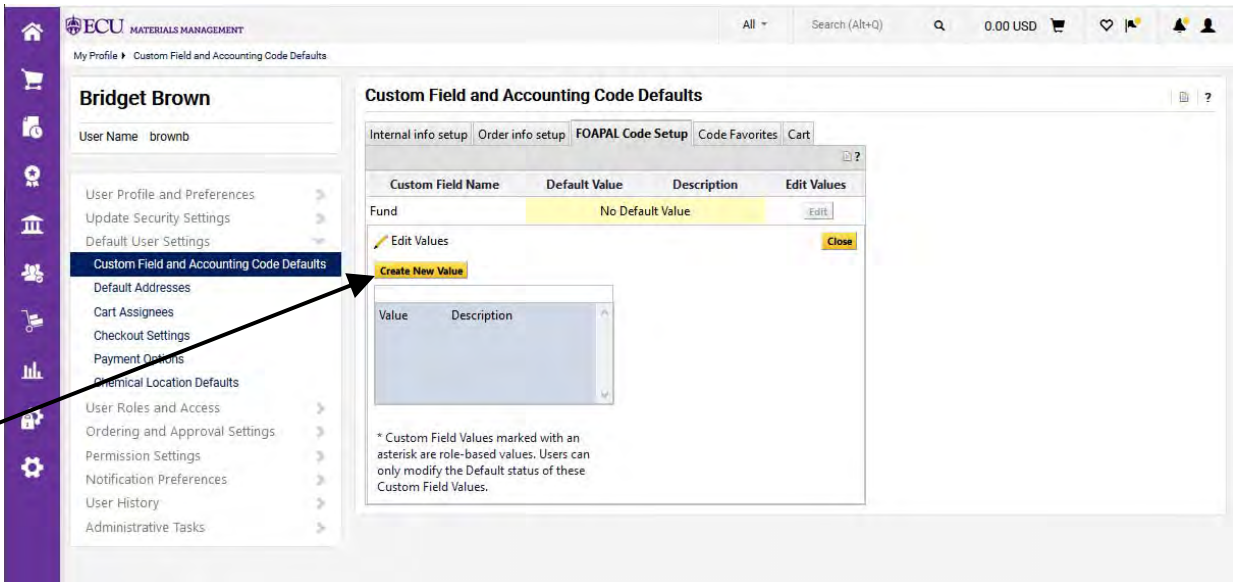
6. Once you are at the **FOAPAL Code Setup** tab, you can perform the following task related to your FOAPAL codes: adding FOAPAL codes to your profile, deleting FOAPAL codes from your profile, and changing your default FOAPAL codes. **Note:** For a complete understanding of FOAPAL codes, budget queries, and budget transfer; you should attend Banner 101 & 102 training sessions.

FOAPAL CODE – ADDITIONS BY VALUE

Last Updated on: 4/01/2020



1. Click on the **Edit** button that corresponds to the FOAPAL element that you need to add to your profile.
Note: The steps for adding a value to your profile are the same for each element: Fund, Organization, Account, Program, Activity, and Location.



2. Click on the **Create New Value** button.

FOAPAL CODE – ADDITIONS BY VALUE

Last Updated on: 4/01/2020

The screenshot shows the 'Custom Field and Accounting Code Defaults' page for user Bridget Brown. The 'FOAPAL Code Setup' tab is active, showing a table with columns for 'Custom Field Name', 'Default Value', 'Description', and 'Edit Values'. The 'Fund' field is highlighted with a yellow background and has a 'No Default Value' status. A search modal is open, allowing the user to search for values. The 'Field Name' is set to 'Fund', and the 'Value' field contains '111170'. The 'Search' button is highlighted with a yellow background.

3. Type in the correct value for the element you are adding. In this example, we are adding a **Fund** value.
4. Click on the **Search** button.

The screenshot shows the search results for the 'Fund' field. The search modal is open, displaying a table with columns for 'Value' and 'Description'. The 'Value' field contains '111170' and the 'Description' field contains 'AA General Institutional Support'. A check box is checked next to the value. The 'Add Values' button is highlighted with a yellow background.

5. Select the **check box** beside the value.
6. Click the **Add Values** button.

FOAPAL CODE – ADDITIONS BY VALUE

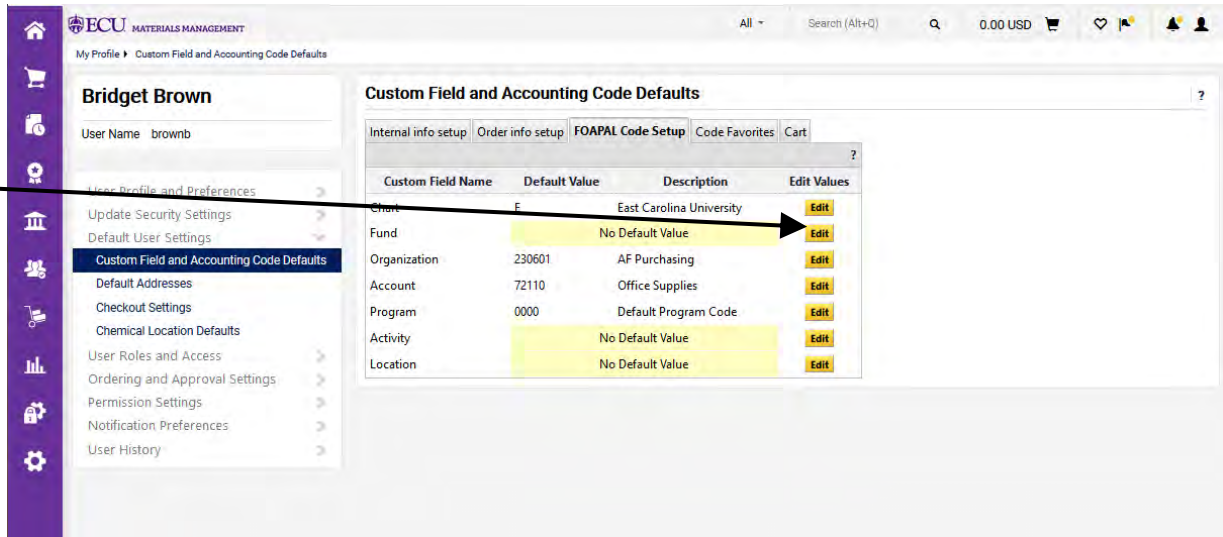
Last Updated on: 4/01/2020

The screenshot shows the 'Custom Field and Accounting Code Defaults' page in the ECU Materials Management system. The user is Bridget Brown. The page has several tabs: 'Internal info setup', 'Order info setup', 'FOAPAL Code Setup', 'Code Favorites', and 'Cart'. The 'FOAPAL Code Setup' tab is active, showing a table with columns 'Custom Field Name', 'Default Value', 'Description', and 'Edit Values'. The table has one row for 'Fund' with a 'No Default Value' entry. A search box is visible with '111170' entered. Callout box 7 points to the search results area, and callout box 8 points to the 'Fund' table header.

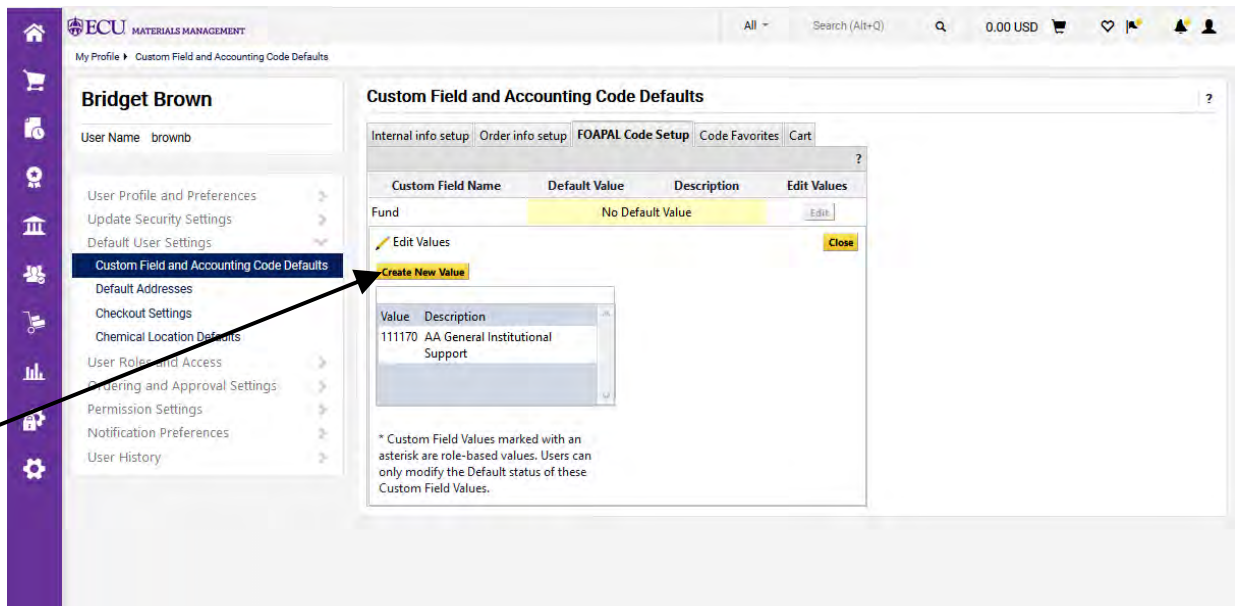
7. Notice that the Fund value is now in your list of values for **Funds**. Also note that there is no default value set for Funds. See the FOAPAL Code Setting Default procedure to setup the default Fund value.
8. This completes the steps for this procedure. Click on the **ECU** icon to return to the home page.

FOAPAL CODE – ADDITIONS BY DESCRIPTION

Last Updated on: 4/01/2020



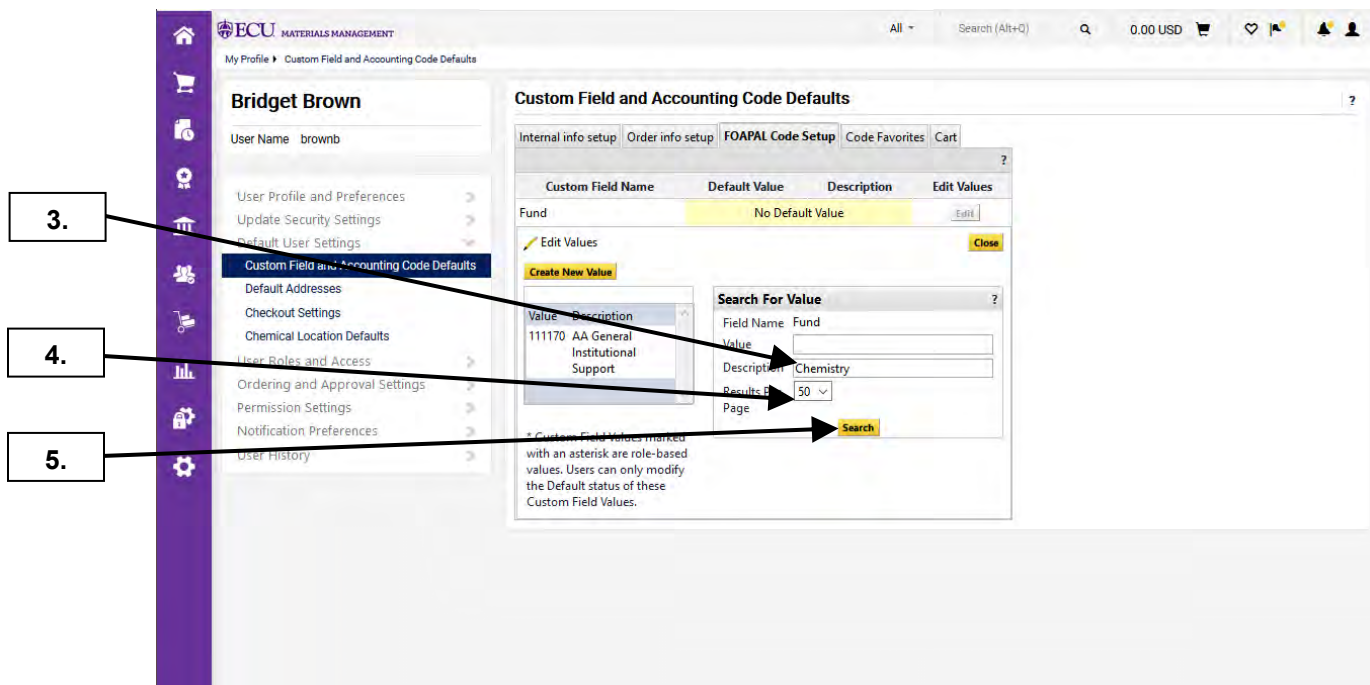
1. Click on the **Edit** button that corresponds to the FOAPAL element that you need to add to your profile.
Note: The steps for adding a value to your profile are the same for each element: Fund, Organization, Account, Program, Activity, and Location.



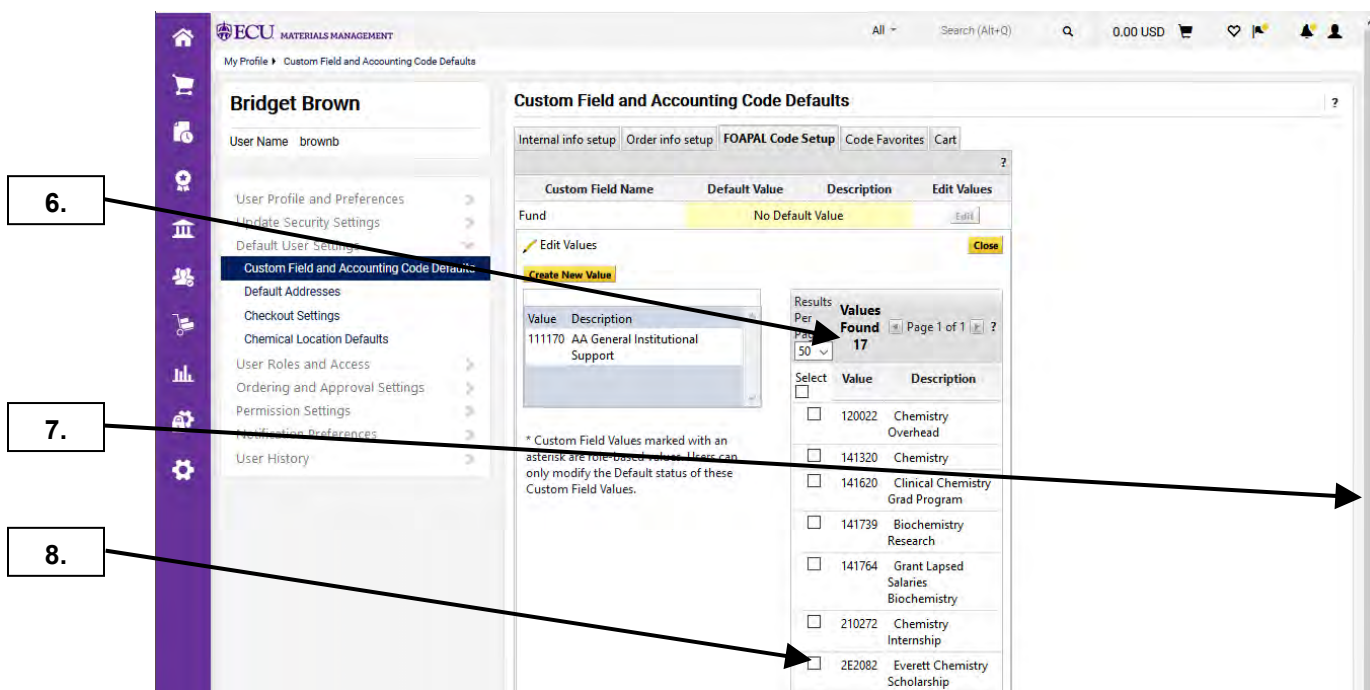
2. Click on the **Create New Value** button.

FOAPAL CODE – ADDITIONS BY DESCRIPTION

Last Updated on: 4/01/2020



3. Type in the description for the element you are adding. In this example, we are adding a **Fund** value with **Chemistry** in the Description.
4. Change the **Results per Page** to 50.
5. Click on the **Search** button.



6. The number of Fund values found on the criteria you type will be displayed at the top of the results.
7. You can scroll down the page to find the desired Fund value.
8. Click the check box beside the desired Fund value. Scroll down the page to add the value to your profile.

FOAPAL CODE – ADDITIONS BY DESCRIPTION

Last Updated on: 4/01/2020

ECU MATERIALS MANAGEMENT

My Profile > Custom Field and Accounting Code Defaults

Custom Field and Accounting Code Defaults

Default Addresses

Checkout Settings

Chemical Location Defaults

User Roles and Access

Ordering and Approval Settings

Permission Settings

Notification Preferences

User History

CUH Values

Create New Value

Value	Description
111170	AA General Institutional Support

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

Results Values Found 17 Page 1 of 1

Select	Value	Description
<input type="checkbox"/>	120022	Chemistry Overhead
<input type="checkbox"/>	141320	Chemistry
<input type="checkbox"/>	141620	Clinical Chemistry Grad Program
<input type="checkbox"/>	141739	Biochemistry Research
<input type="checkbox"/>	141764	Grant Lapsed Salaries Biochemistry
<input type="checkbox"/>	210272	Chemistry Internship
<input checked="" type="checkbox"/>	2E2082	Everett Chemistry Scholarship
<input type="checkbox"/>	6C2082	Grover C Everett Chemistry Award
<input type="checkbox"/>	EA5907	Chemistry Sch Pool
<input type="checkbox"/>	ET3457	Chemistry Dept
<input type="checkbox"/>	ET5181	Chemistry Nmr Ctr
<input type="checkbox"/>	MT7151	Biochemistry General
<input type="checkbox"/>	MT7155	Biochemistry Sem Series
<input type="checkbox"/>	MT7156	Biochemistry Chalavich
<input type="checkbox"/>	MT7157	Biochemistry Barakat
<input type="checkbox"/>	MT7158	Biochemistry Pennington
<input type="checkbox"/>	MT7159	Biochemistry Pekala

Add Values Back to Search

Results Per Page Page 1 of 1

9. Click the **Add Values** button.

ECU MATERIALS MANAGEMENT

Profile > Custom Field and Accounting Code Defaults

Bridget Brown

User Name brownb

User Profile and Preferences

Update Security Settings

Default User Settings

Custom Field and Accounting Code Defaults

Default Addresses

Checkout Settings

Chemical Location Defaults

User Roles and Access

Ordering and Approval Settings

Permission Settings

Notification Preferences

User History

Custom Field and Accounting Code Defaults

Internal info setup Order info setup FOAPAL Code Setup Code Favorites Cart

Custom Field Name	Default Value	Description	Edit Values
Fund	No Default Value		Edit

Edit Values Close

Create New Value

Value	Description
111170	AA General Institutional Support
2E2082	Everett Chemistry Scholarship

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

Results Values Found 16 Page 1 of 1

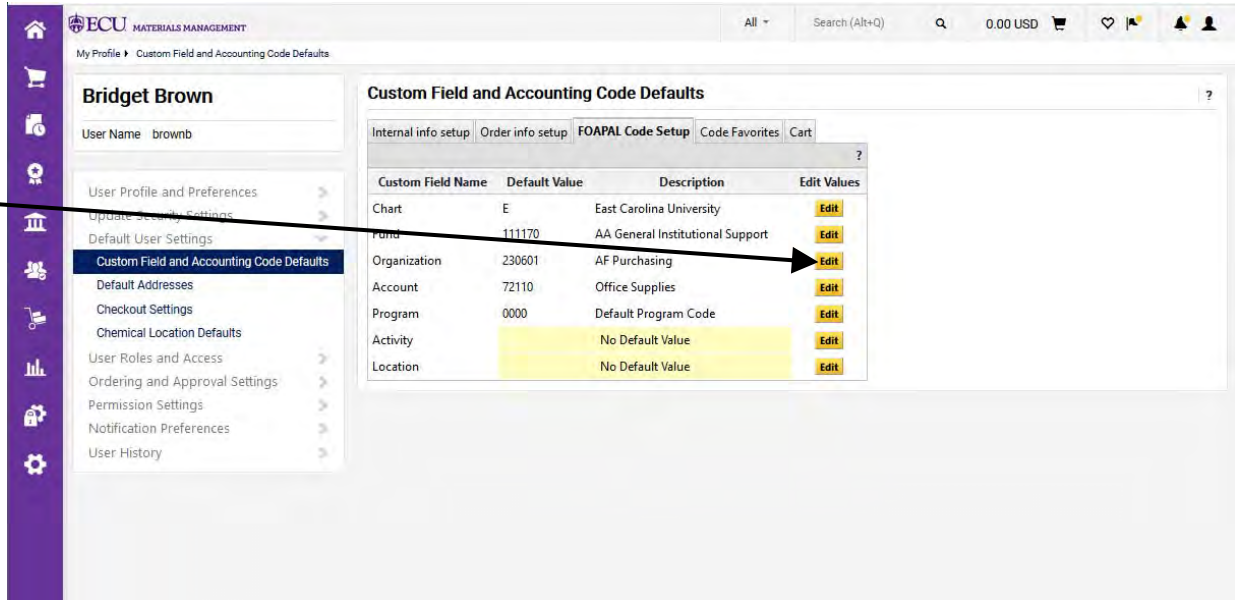
Select	Value	Description
<input type="checkbox"/>	120022	Chemistry Overhead
<input type="checkbox"/>	141320	Chemistry
<input type="checkbox"/>	141620	Clinical Chemistry Grad Program
<input type="checkbox"/>	141739	Biochemistry Research
<input type="checkbox"/>	141764	Grant Lapsed Salaries Biochemistry

10. Notice that the Fund value is now in your list of values for **Funds**.

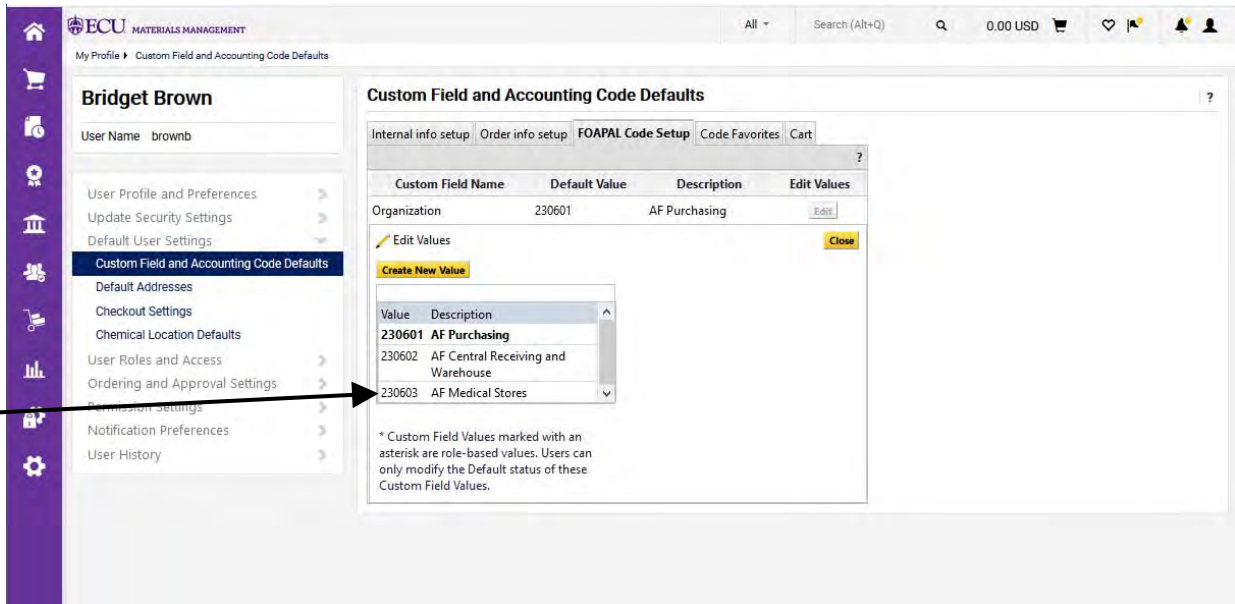
11. This completes the steps for this procedure. Click on the **ECU** icon to return to the home page.

FOAPAL CODE CHANGING DEFAULTS

Last Updated on: 4/01/2020



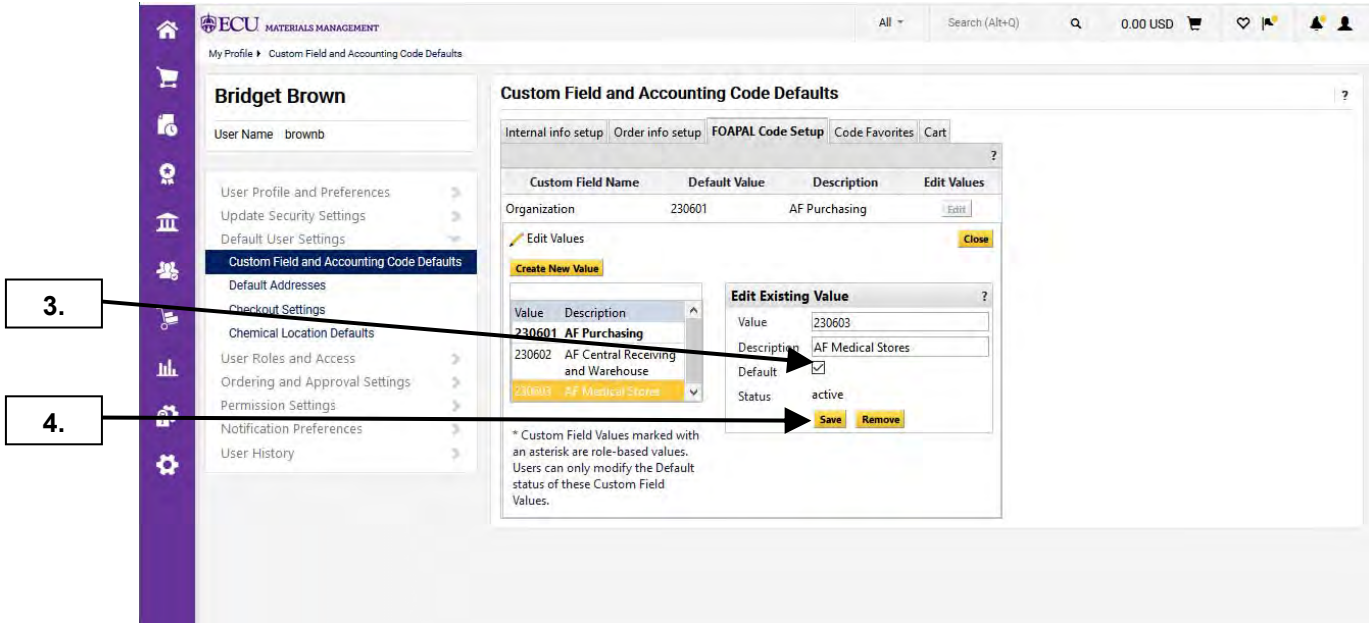
1. Click on the **Edit** button that corresponds to the FOAPAL element that requires changing the default value. In this example, we are changing the default **Org** value.
Note: The steps for change a default value are the same for each element: Fund, Organization, Account, Program, Activity, and Location.



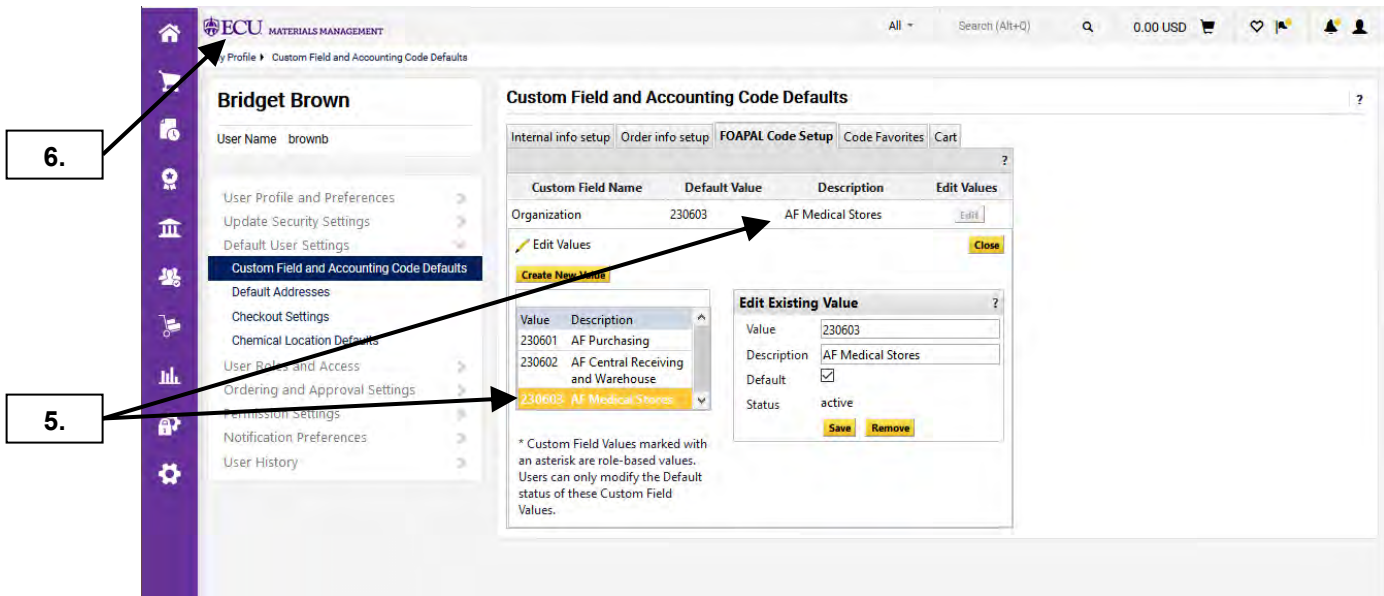
2. Select the value that you want to make the **default**. Note: The current default value is in **bold** print.

FOAPAL CODE CHANGING DEFAULTS

Last Updated on: 4/01/2020



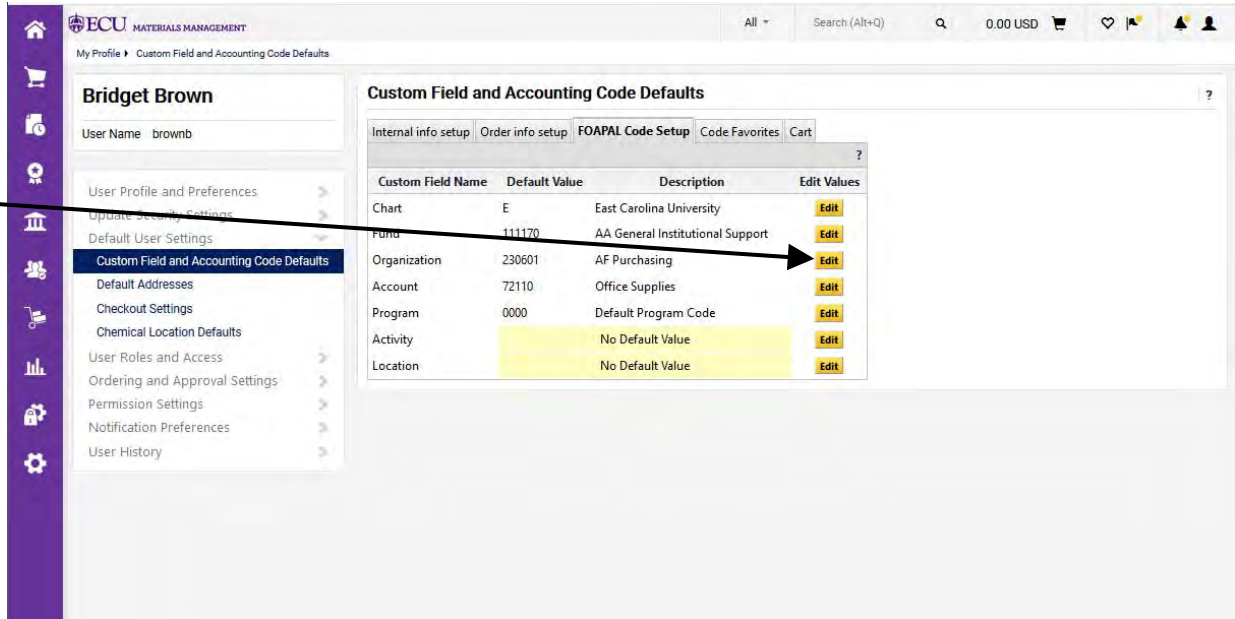
3. Select the **Default** check box.
4. Click the **Save** button.



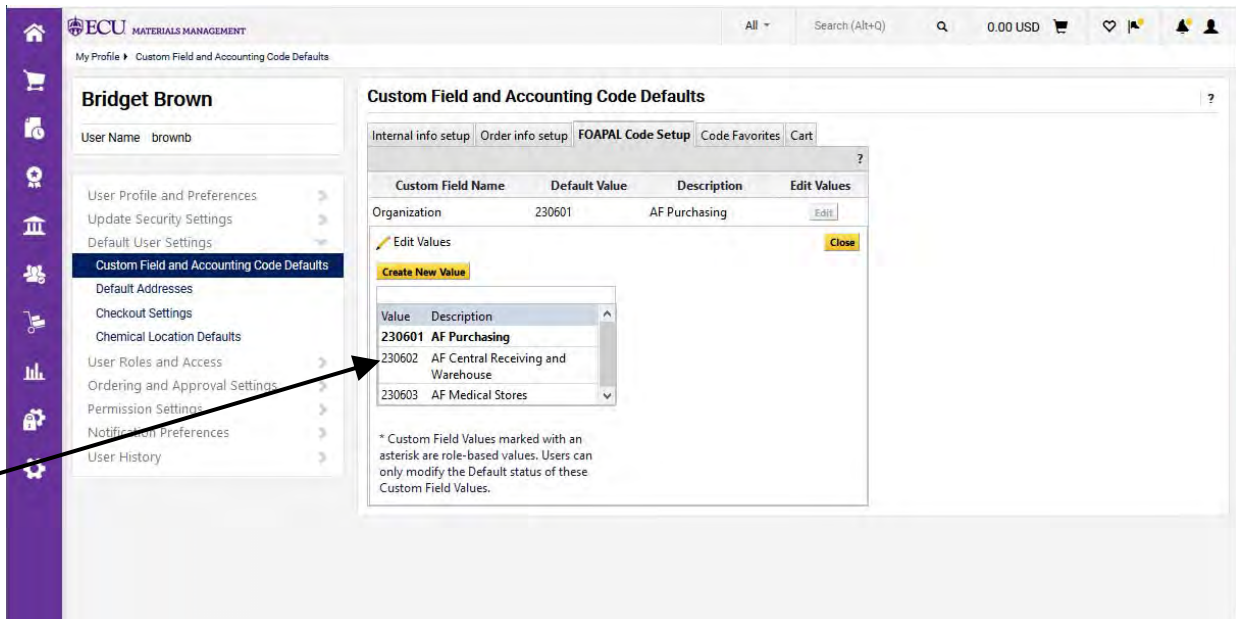
5. Notice the value is now bold and identified as the default Organization. This value will now display as the default on your shopping carts.
6. This completes the steps for this procedure. Click on the **ECU** icon to return to the home page.

FOAPAL CODE DELETIONS

Last Updated on: 4/01/2020



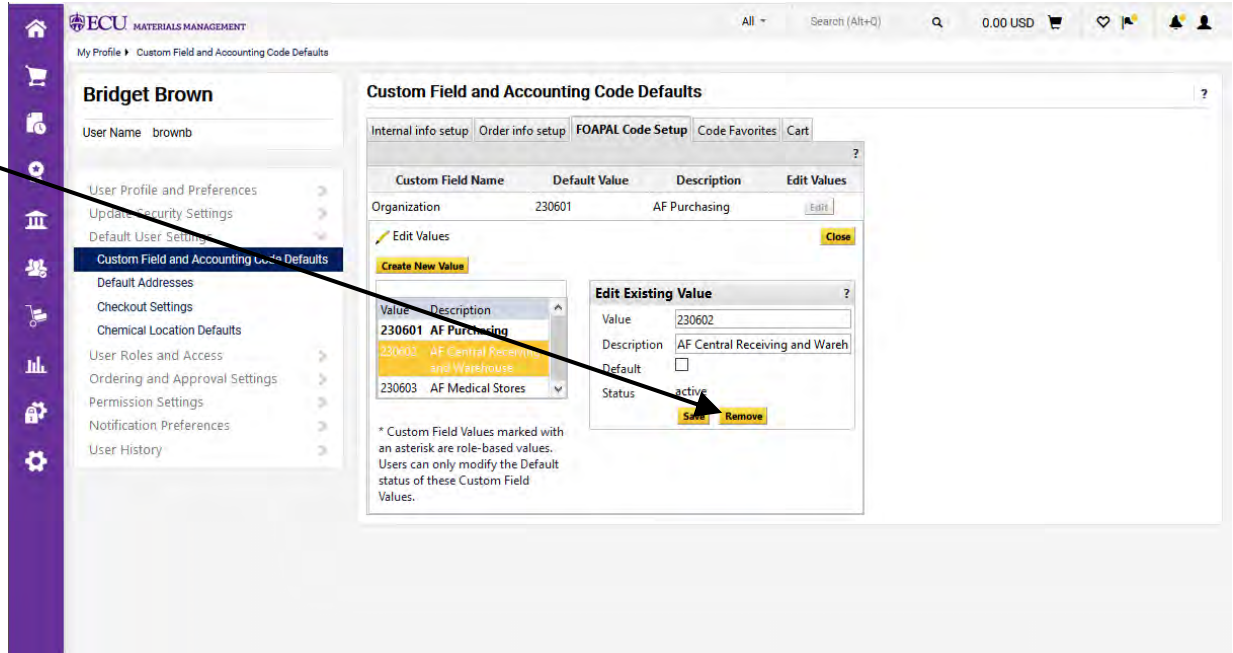
1. Click on **Edit** button that corresponds to the FOAPAL element that you need to delete from your profile. In this example, we are deleting an **Org** value. **Note:** The steps for deleting a value are the same for each element: Fund, Organization, Account, Program, Activity, and Location.



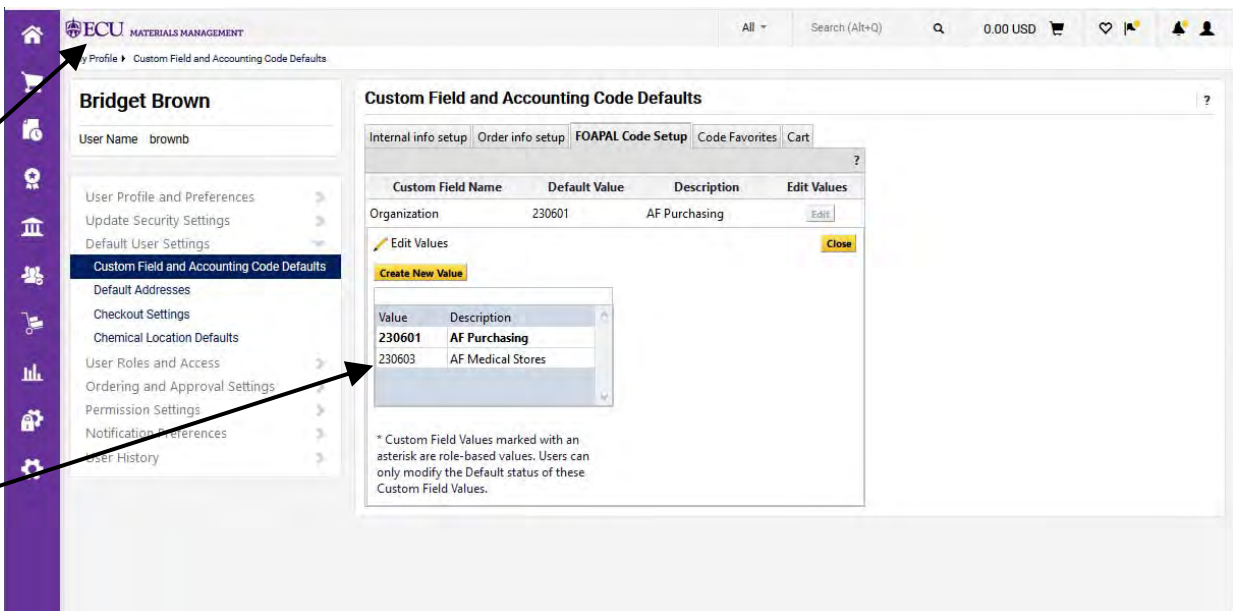
2. Click on value that you want to remove from your profile.

FOAPAL CODE DELETIONS

Last Updated on: 4/01/2020



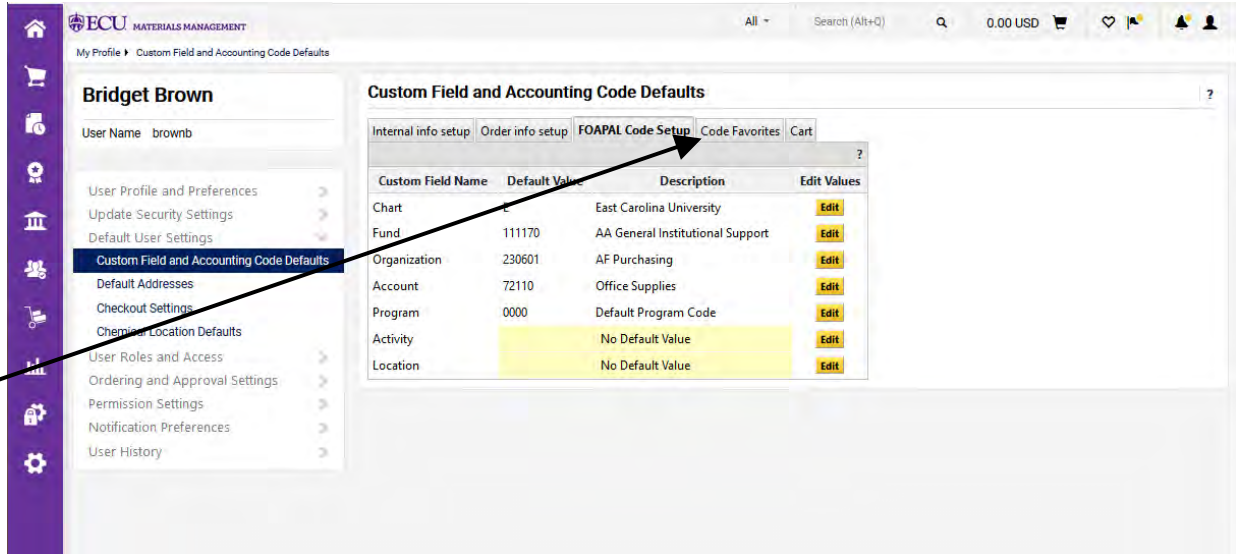
3. Click on the **Remove** button.



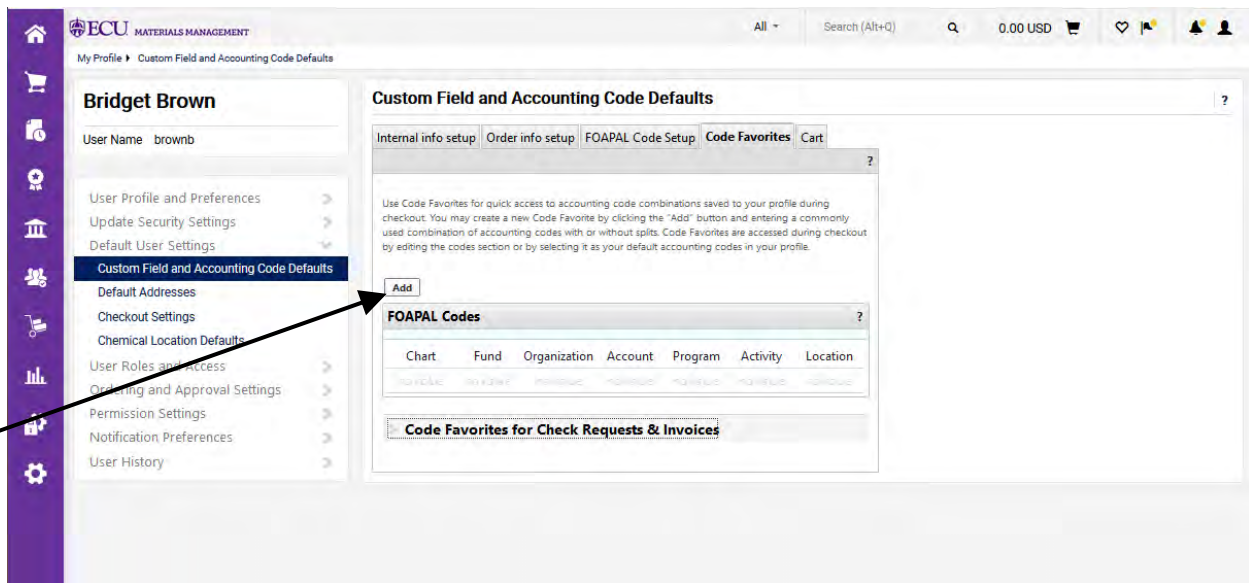
- 4. Notice the value has been removed from your list of values for **Organizations** in your profile.
- 5. This completes the steps for this procedure. Click on the **ECU** icon to return to the home page.

FOAPAL CODE – FAVORITES

Last Updated on: 4/01/2020



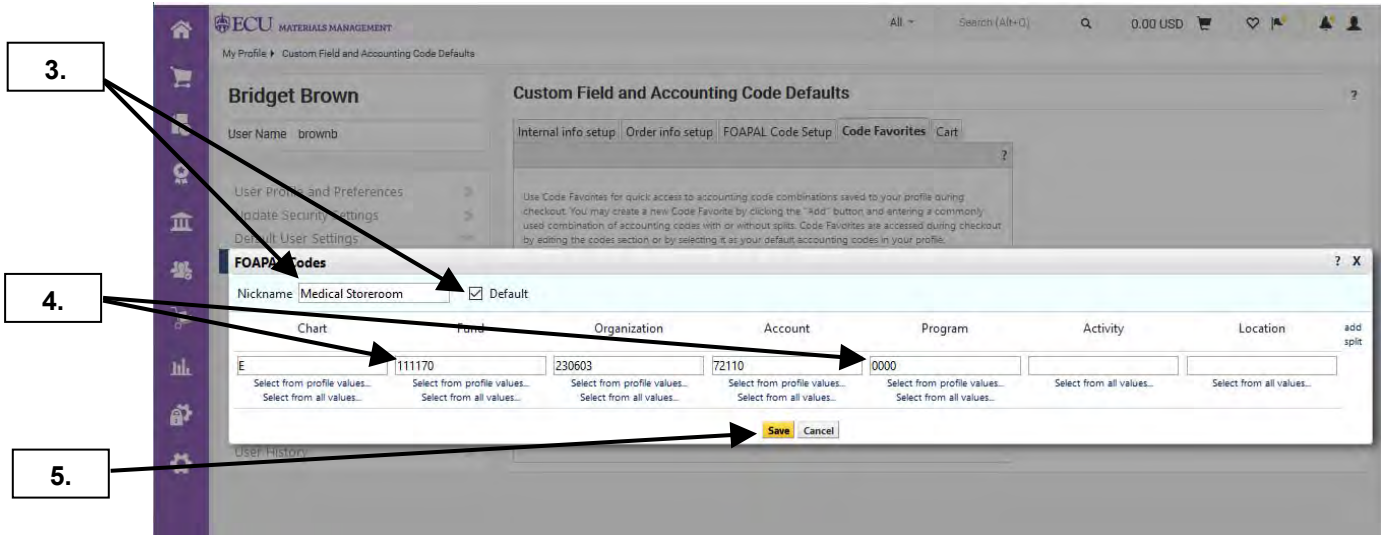
1. Click on the **Code Favorites** tab. **Note:** The steps for adding a value to your profile are the same for each element: Fund, Organization, Account, Program, Activity, and Location.



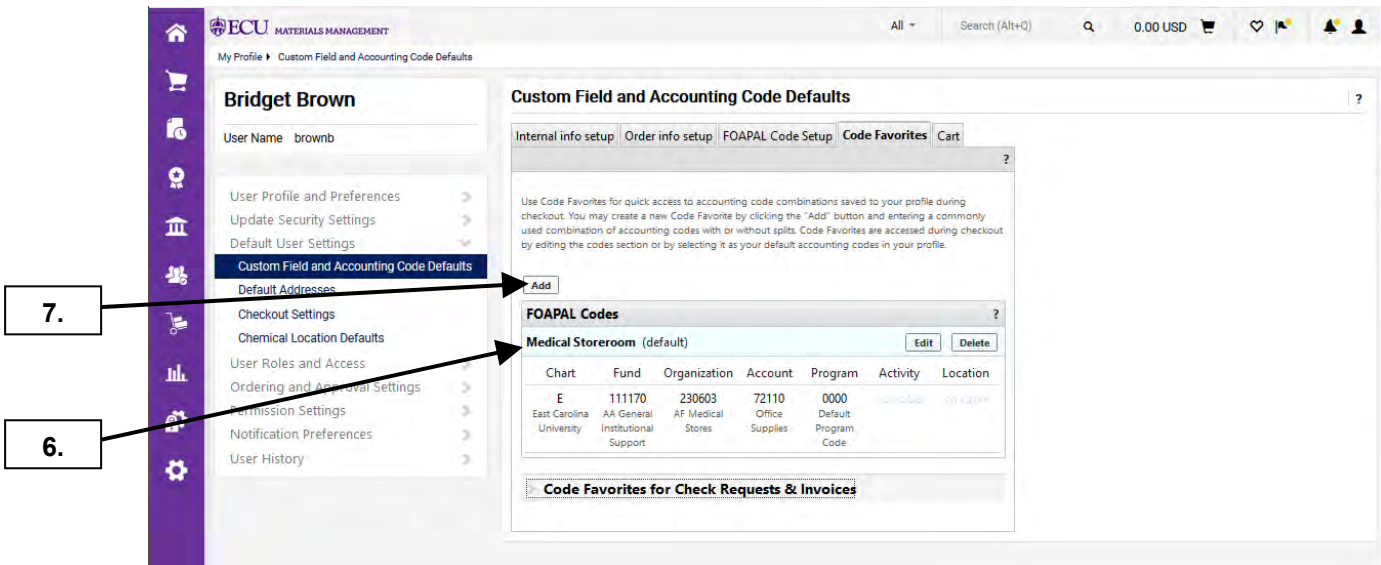
2. Click on the **Add** button.

FOAPAL CODE – FAVORITES

Last Updated on: 4/01/2020



3. Enter the FOAP Favorite **Nickname** and select the **Default** check box if appropriate.
4. If defaults are selected on your user profile, they will be displayed. Update the FOAP values that you want to set as a **FAVORITES**.
5. Click on the **Save** button.

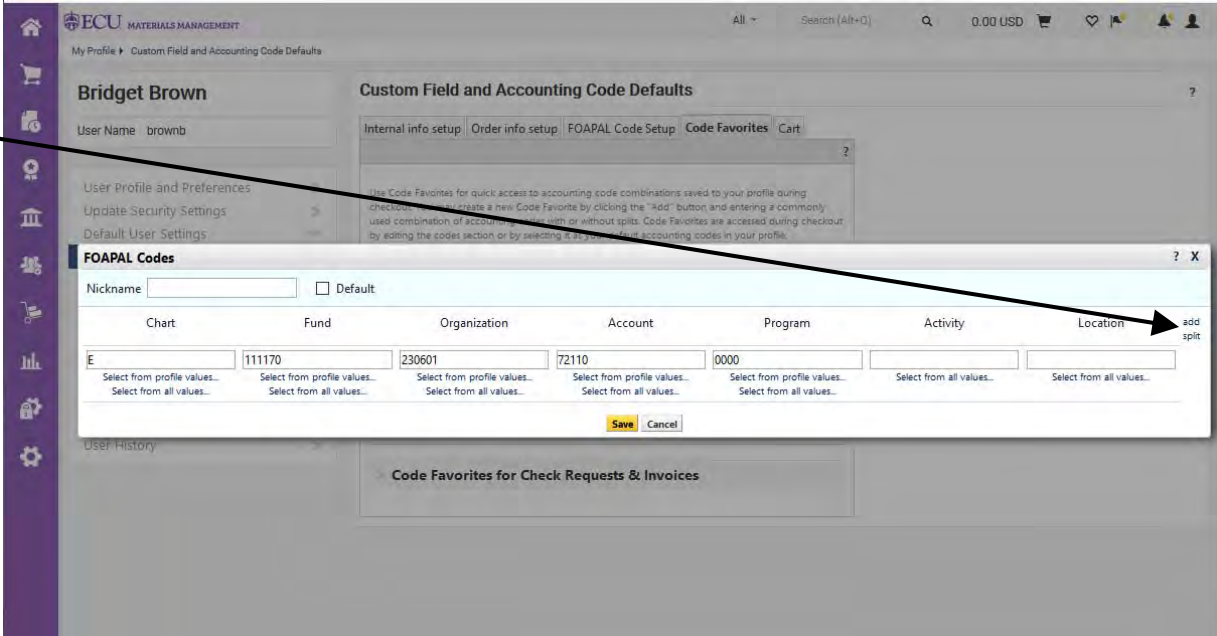


6. Note that the **Code Favorite** was added.
7. Click the **Add** button to add another **Code Favorite** with multiple FOAPAL strings.

FOAPAL CODE – FAVORITES

Last Updated on: 4/01/2020

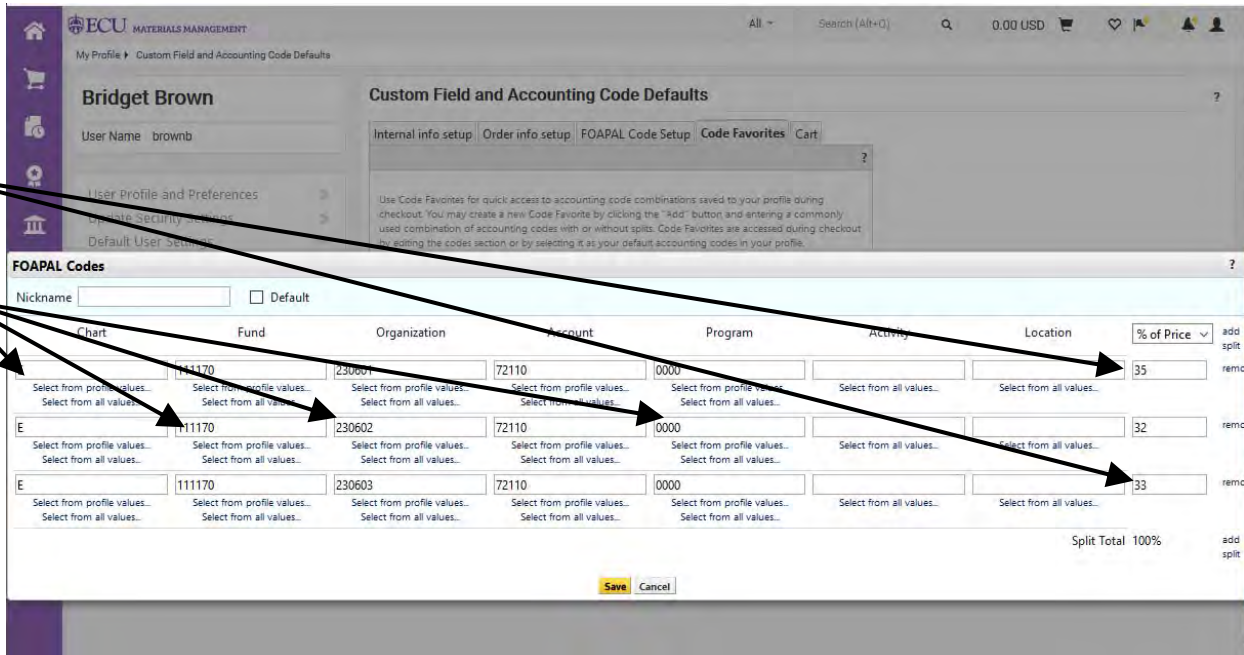
8.



8. Click **add splits** link. **Note:** In this example, we will have 3 different FOAP strings for this code favorite.

9.

11.

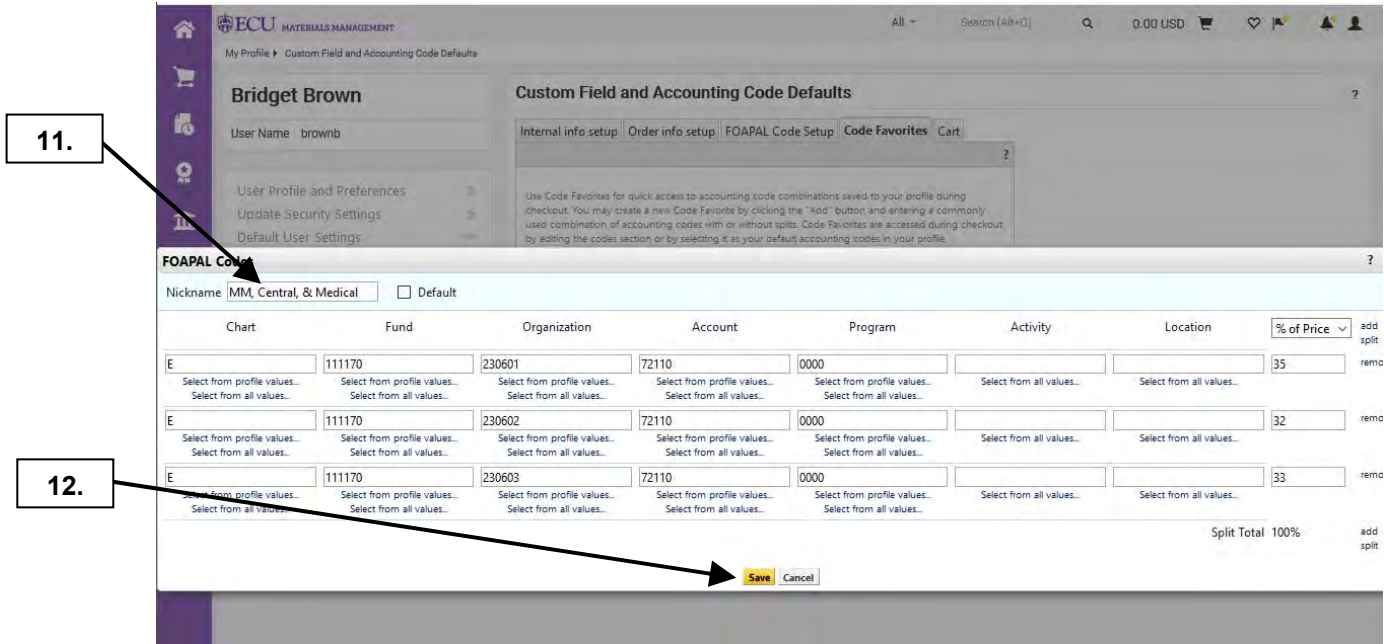


9. The type of FOAP split will be % or Price. Enter the % for each split.

10. Enter the desired FOAP values for the favorite code split list.

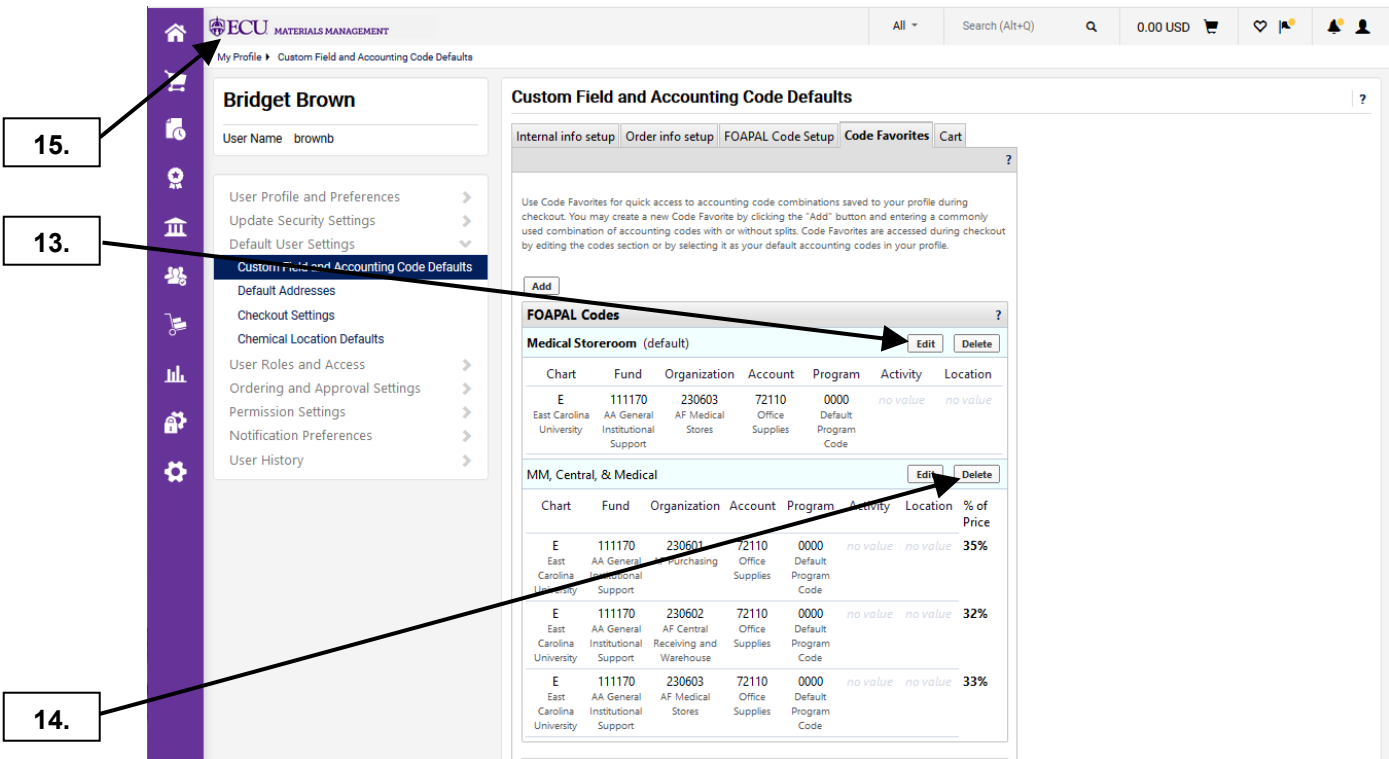
FOAPAL CODE – FAVORITES

Last Updated on: 4/01/2020



11. Enter the FOAP favorite **Nickname**.

12. Click the **Save** button.



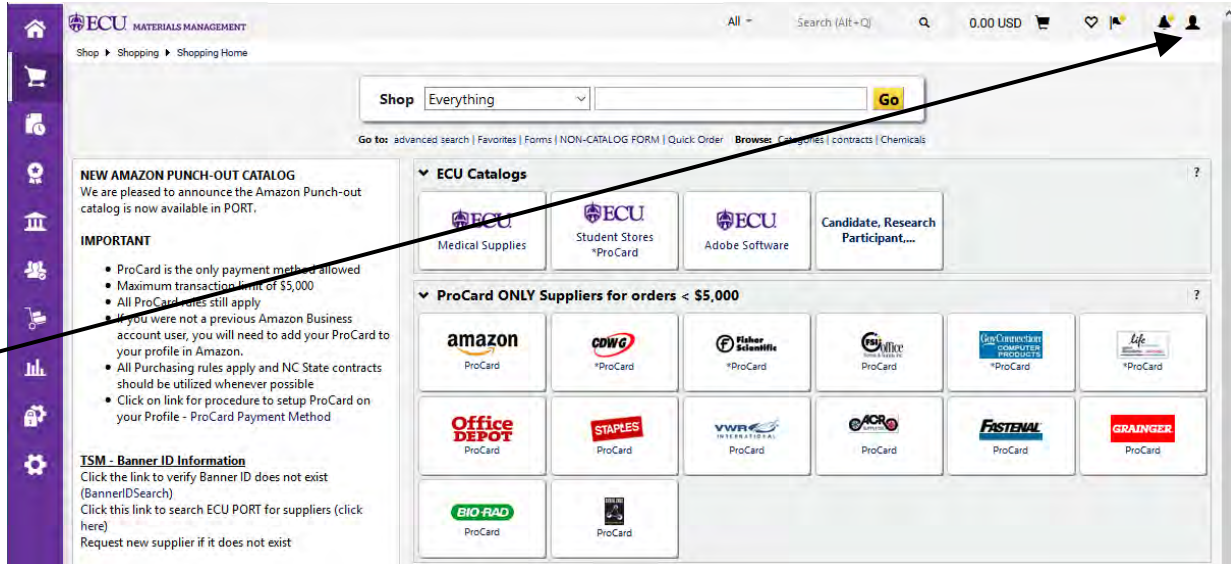
13. To edit one of you FOAP favorites, click the **Edit** button and repeat steps 3 – 5.

14. To delete one of your FOAP favorites, click the **Delete** button. You will be prompted with a pop-up window to confirm the deletion. Click **OK** button to confirm.

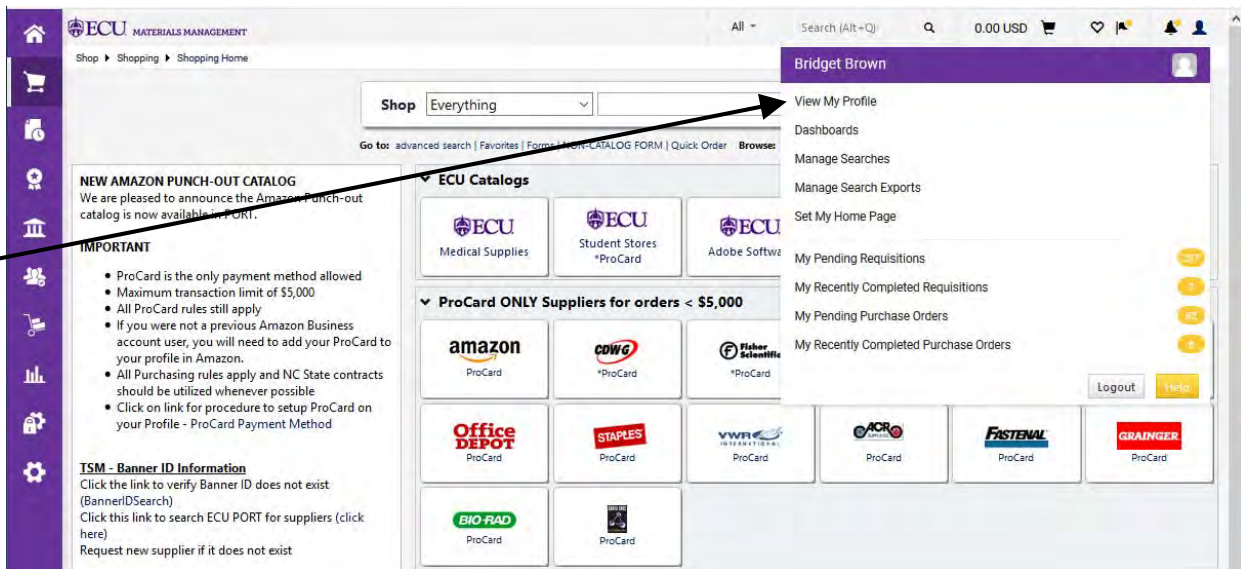
15. This completes the steps for this procedure. Click on **ECU** icon to return to the home page.

SHIP CODE EDITS

Last Updated on: 4/01/2020



1. Click on **User icon**.



2. From fly-out menu, select **View My Profile**.

SHIP CODE EDITS

Last Updated on: 4/01/2020

ECU MATERIALS MANAGEMENT

Purchase Order Number Search (Alt+Q) 0.00 USD

My Profile > User's Name, Phone Number, Email, etc.

Bridget Brown

User Name brownb

User Profile and Preferences

- User's Name, Phone Number, Email, etc. (highlighted)
- Language, Time Zone and Display Settings
- App Activation Codes
- Early Access Participation
- Update Security Settings >
- Default User Settings > (highlighted)
- User Roles and Access >
- Ordering and Approval Settings >
- Permission Settings >
- Notification Preferences >
- User History >

User's Name, Phone Number, Email, etc.

First Name

Last Name

Phone Number * ext.

Mobile Phone Number

E-mail Address *

Department * Administration and Finance (Administration and Finance)

Position -

Badge Id

Authentication Method Local

User Name * brownb

University Terms and Conditions accepted on 7/10/2019 9:08 AM System Messages

★ Required Save Changes

3. Click on the **Default User Settings** link.

ECU MATERIALS MANAGEMENT

Purchase Order Number Search (Alt+Q) 0.00 USD

My Profile > User's Name, Phone Number, Email, etc.

Bridget Brown

User Name brownb

User Profile and Preferences

- User's Name, Phone Number, Email, etc.
- Language, Time Zone and Display Settings
- App Activation Codes
- Early Access Participation
- Update Security Settings >
- Default User Settings >
- Custom Field and Accounting Code Defaults >
- Default Addresses (highlighted)
- Checkout Settings >
- Chemical Location Defaults >
- User Roles and Access >
- Ordering and Approval Settings >
- Permission Settings >
- Notification Preferences >
- User History >

User's Name, Phone Number, Email, etc.

First Name

Last Name

Phone Number * ext.

Mobile Phone Number

E-mail Address *

Department * Administration and Finance (Administration and Finance)

Position -

Badge Id

Authentication Method Local

User Name * brownb

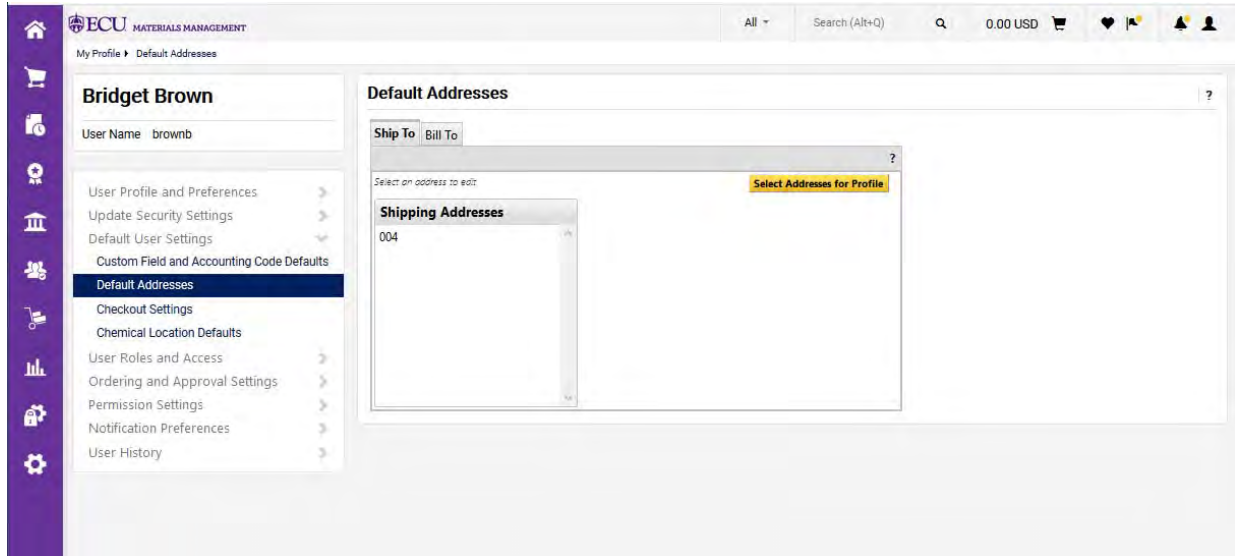
University Terms and Conditions accepted on 7/10/2019 9:08 AM System Messages

★ Required Save Changes

4. Click on **Default Addresses** link.

SHIP CODE EDITS

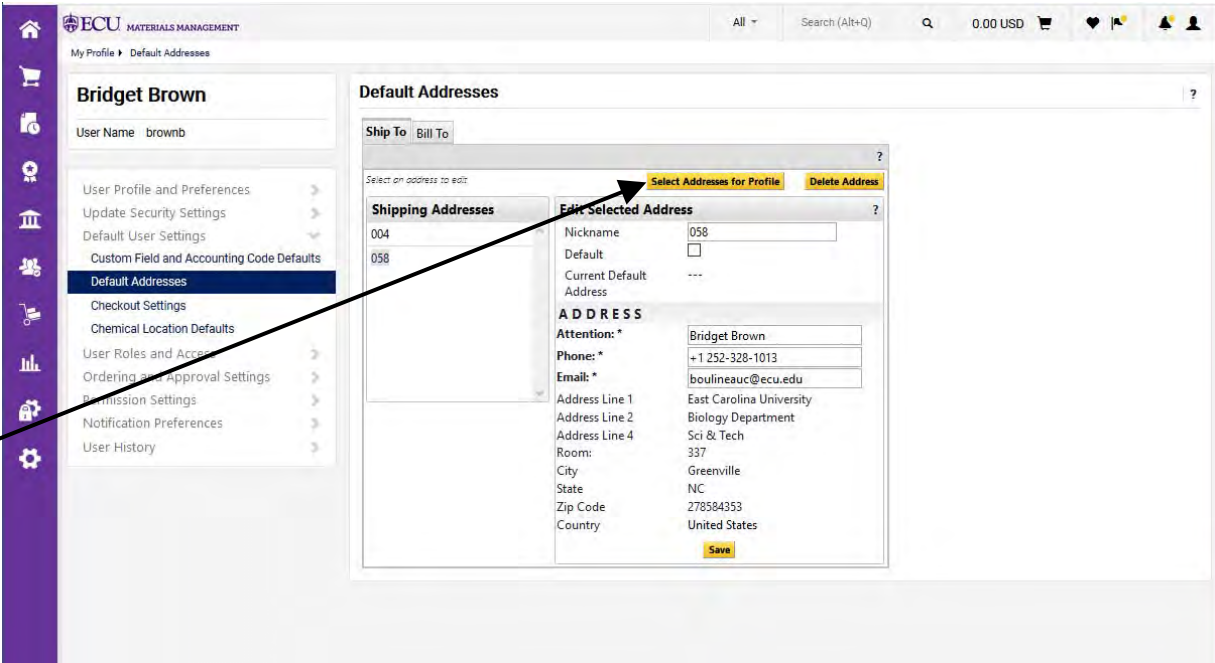
Last Updated on: 4/01/2020



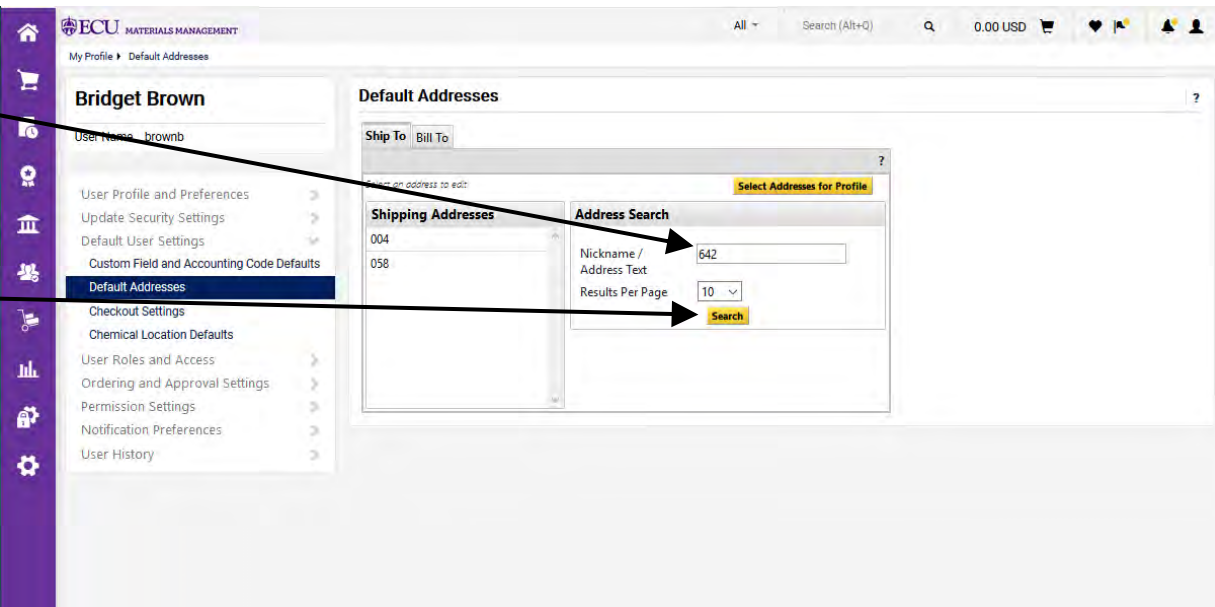
5. Once you are at Default Addresses, you can perform the following tasks related to your ship codes: updating your contact information on your ship codes, adding ship codes to your profile, deleting ship codes from your profile, and changing your default ship code. **Note:** If you need to change your address information on your ship code or request a new ship code, complete the **Ship Code Maintenance** form in PORT.

SHIP CODE – ADDITIONS BY NICK NAME

Last Updated on: 4/01/2020



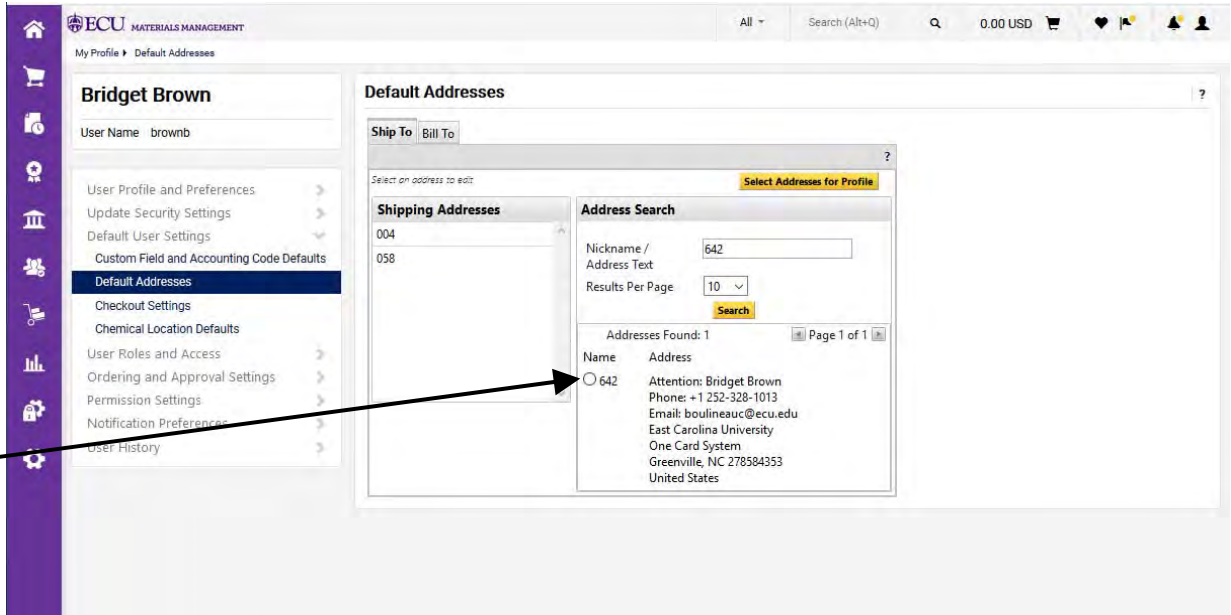
1. Click on **Select Addresses for Profile** button.



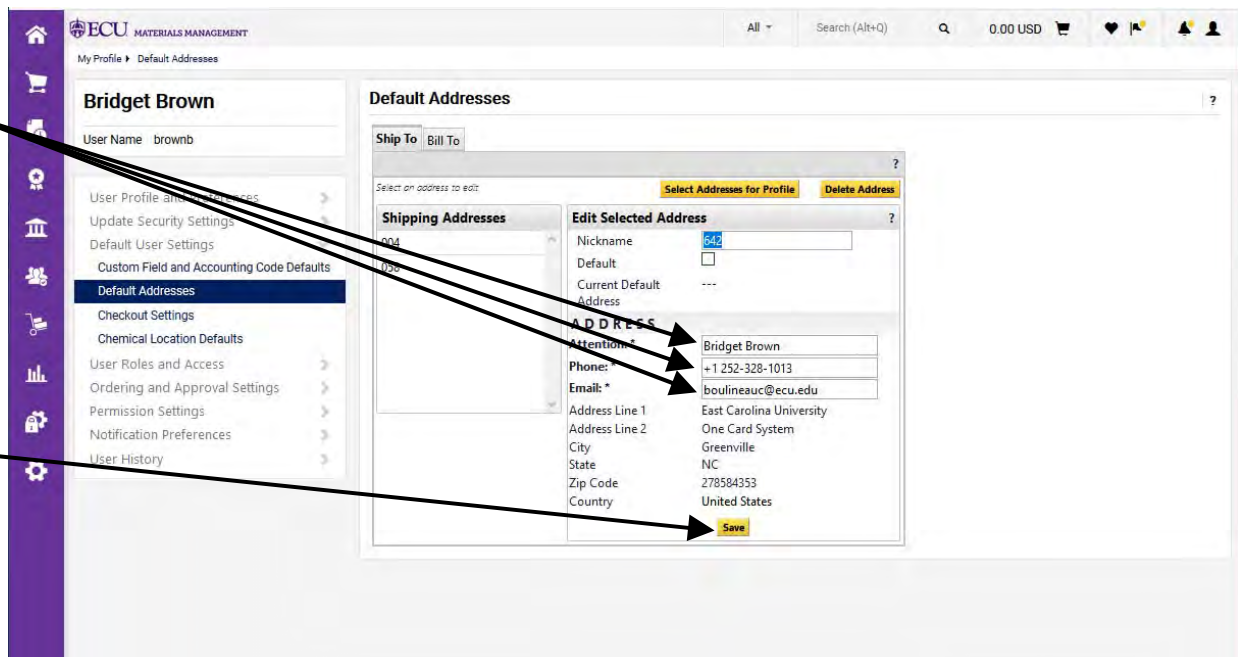
2. Enter ship code number in the **Nickname / Address Text** field if you already know value for the address that needs to be added to your profile. **Note:** Now you can enter either the Nickname or Address Text in the same text box for ship code searches. Mail stop codes are not the same as ship codes, different applications.
3. Click **Search** Button.

SHIP CODE – ADDITIONS BY NICK NAME

Last Updated on: 4/01/2020



4. Click the radio button beside the ship code #.



5. Type in the appropriate **Contact Name**, **Phone**, and **Email** for the ship code. **Note:** The phone # must be in the following format: **+1 (123) 123-1234**.

6. Click **Save** button to add the ship code to your profile.

SHIP CODE – ADDITIONS BY NICK NAME

Last Updated on: 4/01/2020

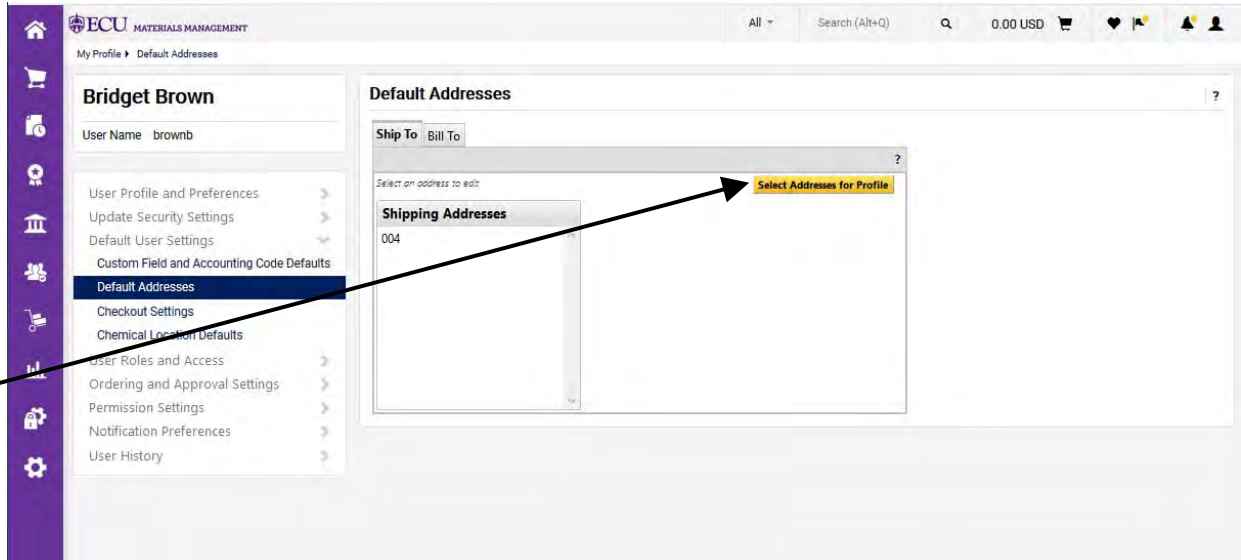
8.

7.

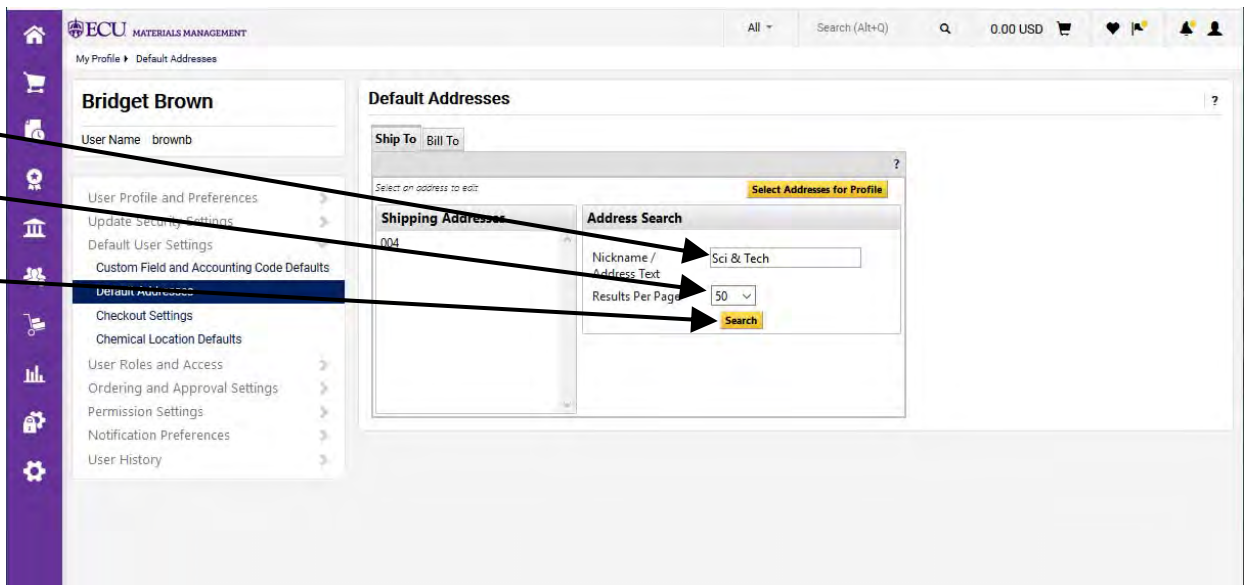
7. Notice that the new ship code is now in your list of values for **Shipping Addresses**.
8. This completes the steps for this procedure. Click on the **ECU** icon to return to the home page.

SHIP CODE – ADDITIONS BY DESCRIPTION

Last Updated on: 4/01/2020



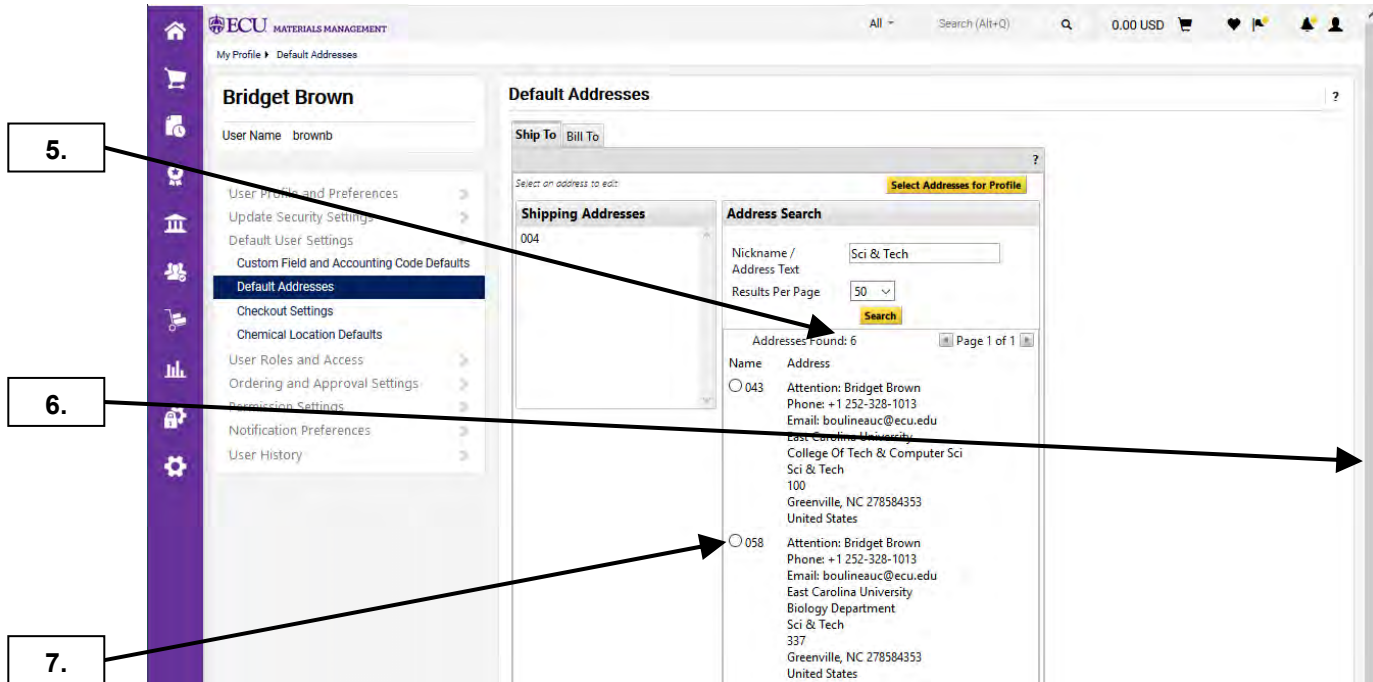
1. Click on **Select Addresses for Profile** button.



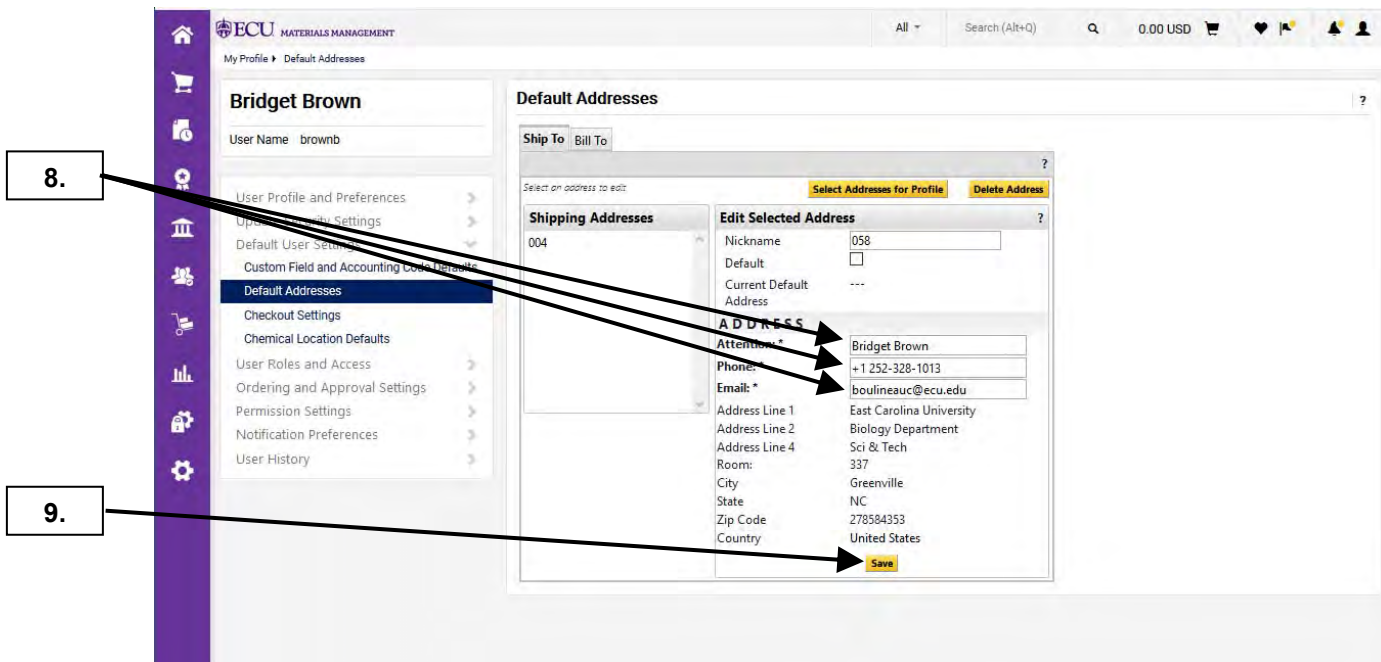
2. Enter the description in the **Nickname / Address Text** field. **Note:** Now you can enter either the ship code or Address Text in the same text box for ship code searches. Address text includes the following: Department Name, Street Address, Building, Room #, City, State, or Zip Code.
3. Change the **Results per Page** to 50.
4. Click the **Search** Button.

SHIP CODE – ADDITIONS BY DESCRIPTION

Last Updated on: 4/01/2020



5. The number of addresses found on the criteria you entered will be displayed at the top of the results.
6. Scroll down the page to find the desired ship code.
7. Click the radio button beside the ship code for desired shipping address.



8. Your **Name**, **Phone**, and **Email** will default in the contact information for the ship code from your profile. You can change this contact information if appropriate for the employee at that location. **Note:** The phone # must be in the following format: **+1 (123) 123-1234**.
9. Click the **Save** button to add the ship code to your profile.

SHIP CODE – ADDITIONS BY DESCRIPTION

Last Updated on: 4/01/2020

The screenshot displays the 'Default Addresses' page for user Bridget Brown. The page is divided into several sections:

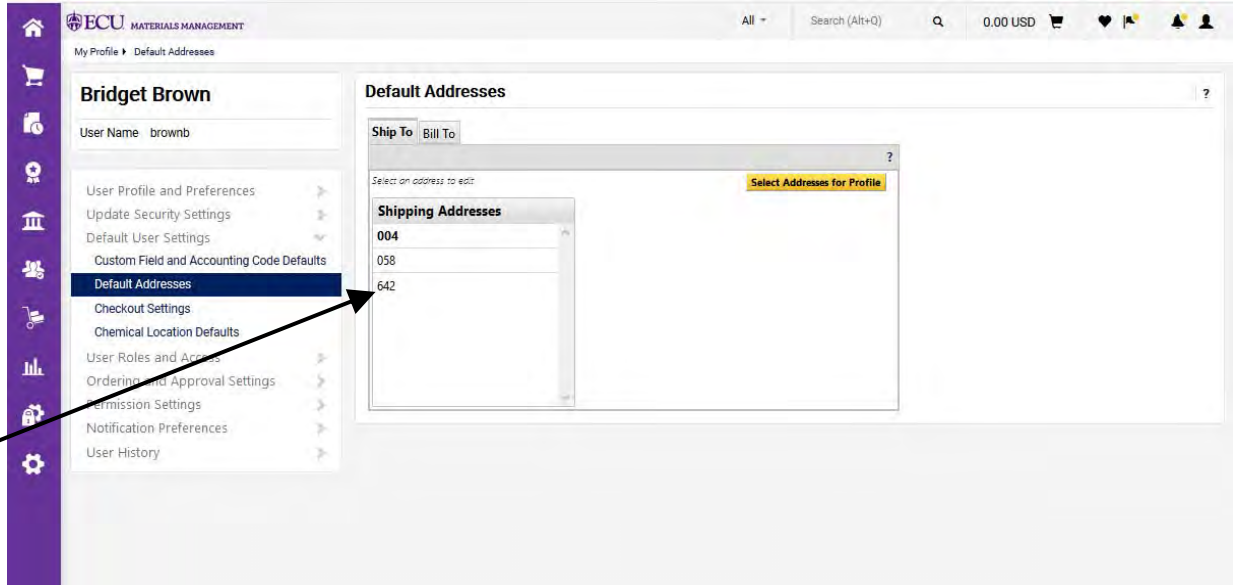
- Header:** ECU MATERIALS MANAGEMENT, All, Search (Alt+Q), 0.00 USD, and user profile icons.
- Left Sidebar:** My Profile > Default Addresses. Below this is the user's name 'Bridget Brown' and 'User Name: brownb'. A list of settings is shown, with 'Default Addresses' highlighted. Callout box 11 points to the 'ECU' icon at the top of this sidebar.
- Main Content:** 'Default Addresses' section with tabs for 'Ship To' and 'Bill To'. Below the tabs is a 'Shipping Addresses' list with two entries: '004' and '058'. Callout box 10 points to the '058' entry. To the right of the list is an 'Edit Selected Address' form with fields for Nickname (058), Default (checkbox), Current Default Address (---), and a section for 'ADDRESS' with fields for Attention (*), Phone (*), Email (*), Address Line 1-4, Room, City, State, Zip Code, and Country. A 'Save' button is at the bottom of the form.

10. Notice that the new ship code is now in your list of values for **Shipping Addresses**.

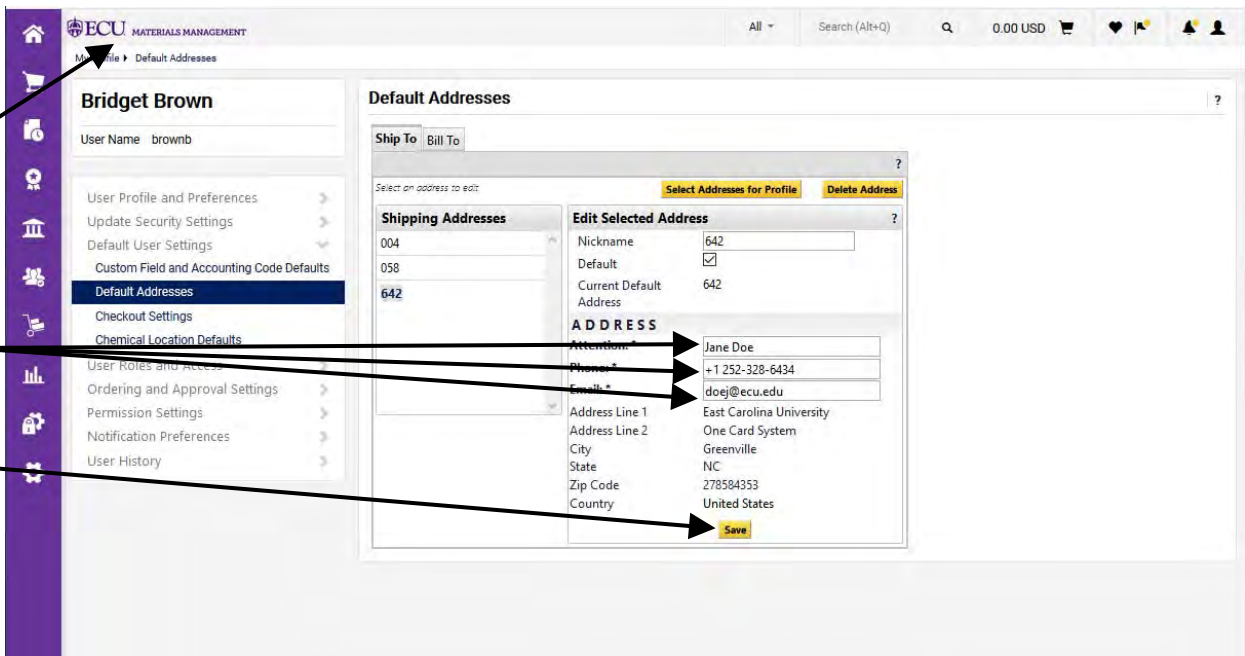
11. This completes the steps for this procedure. Click on the **ECU** icon to return to the home page.

SHIP CODE – CONTACT INFORMATION EDITS

Last Updated on: 4/01/2020



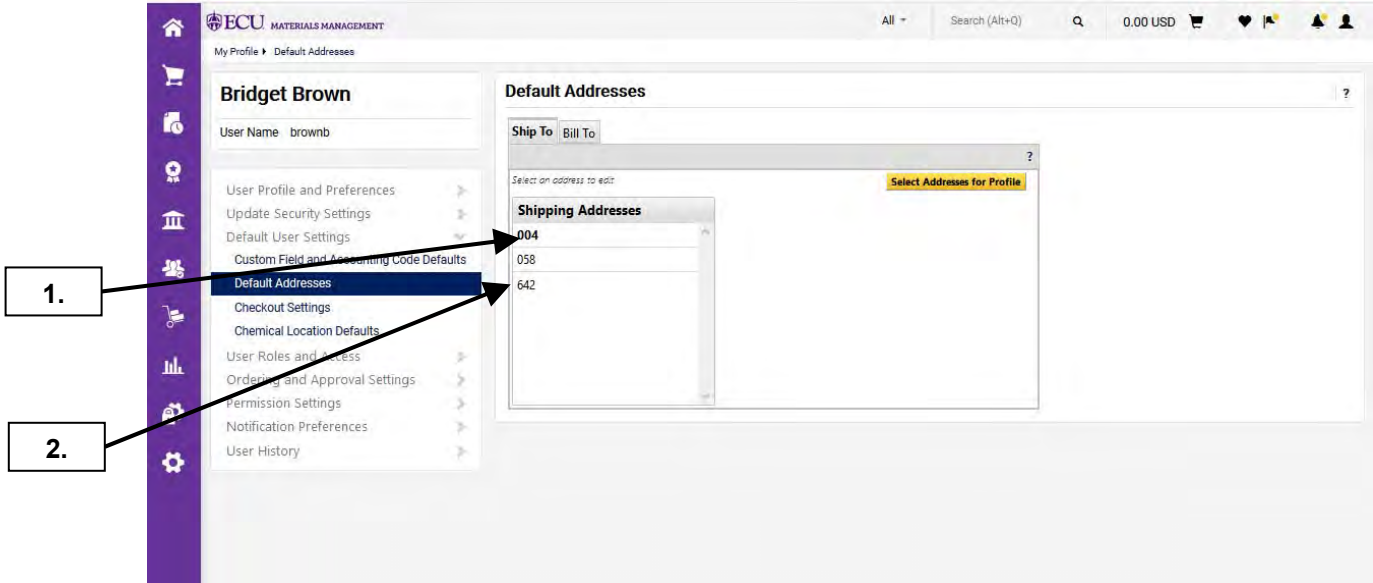
1. Click on the ship code in your profile.



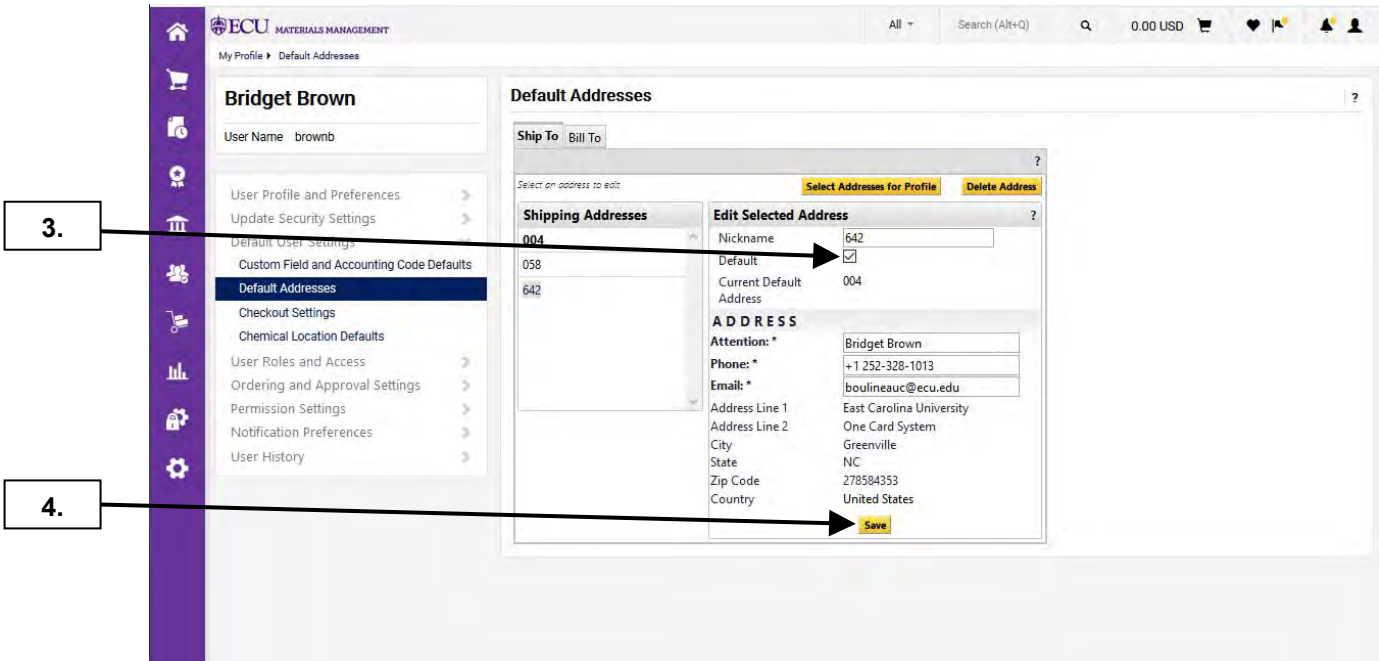
2. Here's where you can change the **Contact Name**, **Phone #**, or **Email Address** for the ship code. **Note:** The phone # must be entered in the following format: **+1 (123) 123-1234**.
3. Click the **Save** button to keep the changes.
4. This completes the steps for this procedure. Click on the **ECU** icon to return to the home page.

SHIP CODE – CHANGING DEFAULT VALUE

Last Updated on: 4/01/2020



1. The bold value is the default ship code that will automatically show up on all your requisitions.
2. Click on the ship code that you want to make the default value.



3. Check the **Default** check box.
4. Click the **Save** button to keep the change.

SHIP CODE – CHANGING DEFAULT VALUE

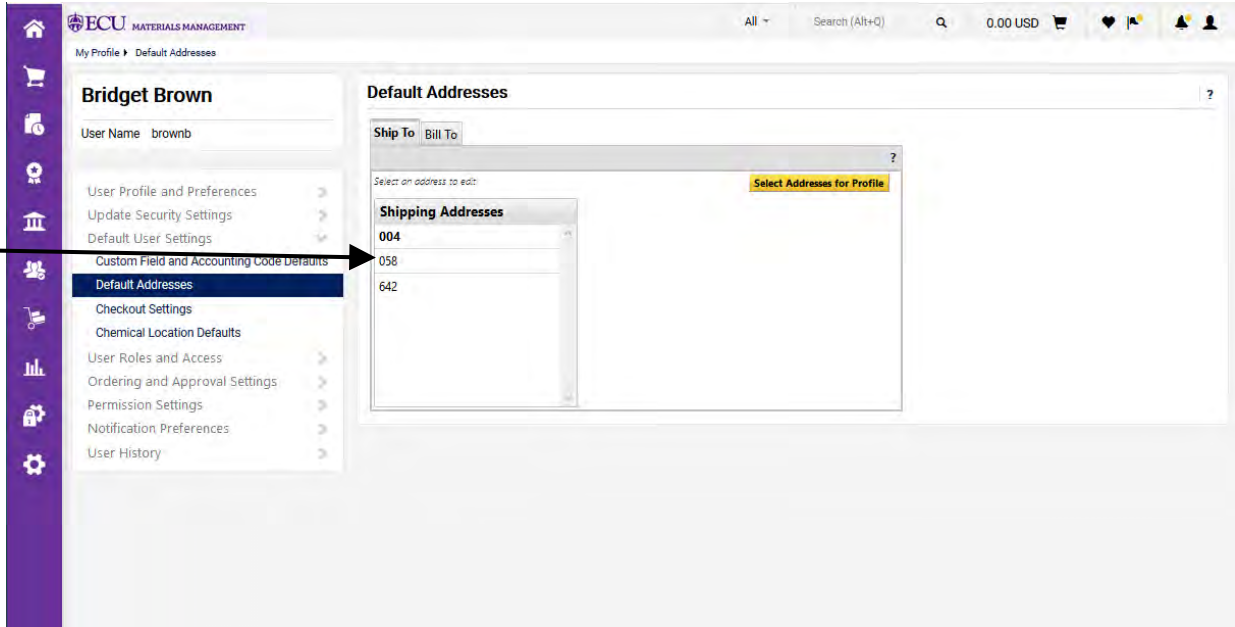
Last Updated on: 4/01/2020

The screenshot shows the ECU Materials Management user interface. On the left sidebar, the 'Default Addresses' menu item is highlighted with a box labeled '5.'. In the main content area, the 'Shipping Addresses' list shows three entries: 004, 058, and 642. The entry '642' is bolded and has a box labeled '6.' with an arrow pointing to it. The 'Edit Selected Address' form on the right shows the 'Current Default' checkbox checked for the selected address 642. The form also displays the address details for 642, including the name 'Bridget Brown', phone number '+1 252-328-1013', email 'boulineauc@ecu.edu', and full address 'East Carolina University, One Card System, Greenville, NC, 278584353, United States'.

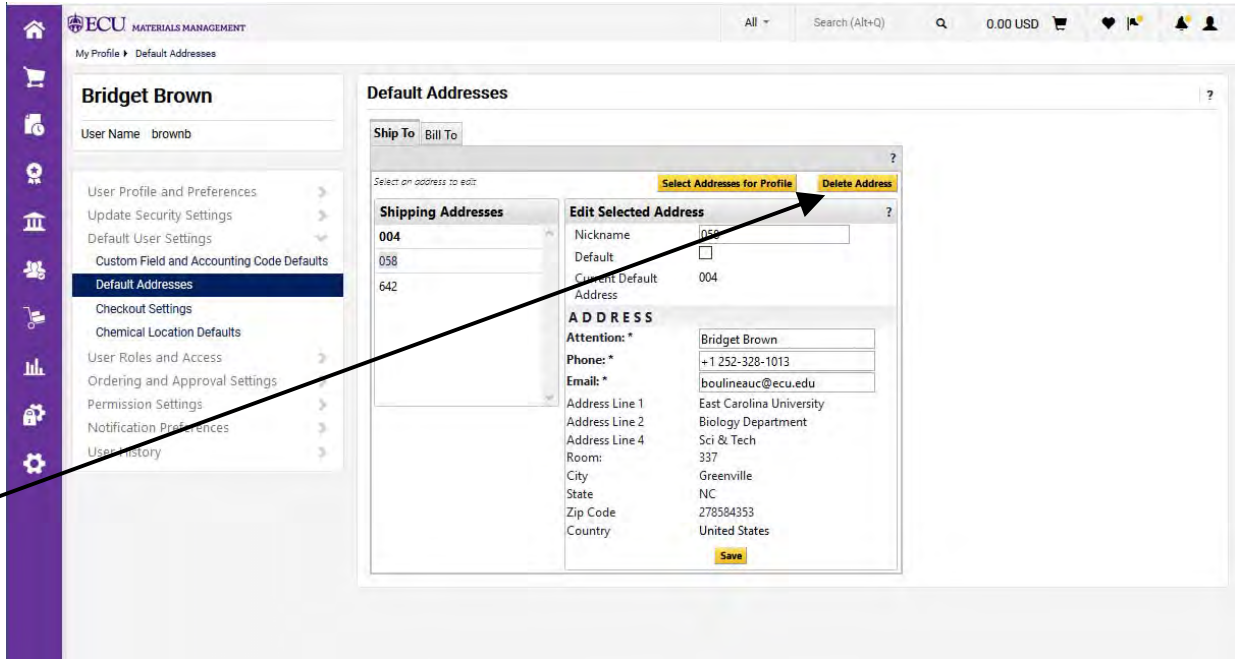
5. The value is now bold and will be the default ship code on your requisitions.
6. This completes the steps for this procedure. Click on the **ECU** icon to return to the home page.

SHIP CODE – DELETING SHIP CODES

Last Updated on: 4/01/2020



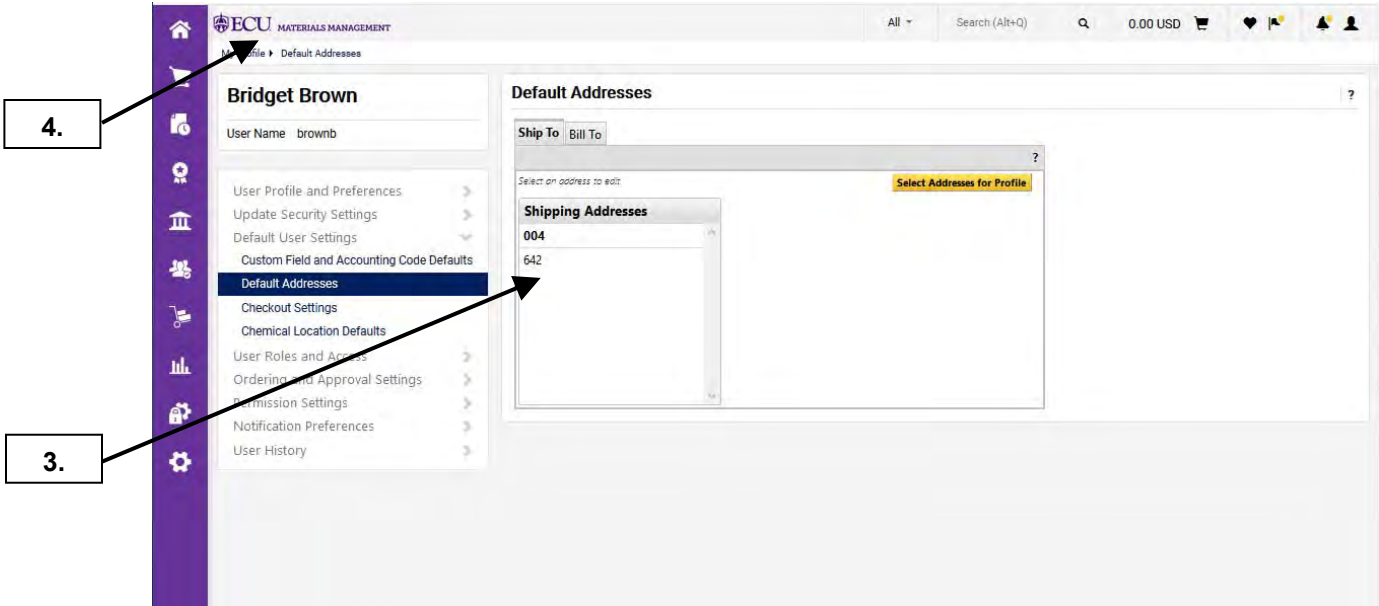
1. Select the ship code that you want to remove from your profile.



2. Click the **Delete Address** button.

SHIP CODE – DELETING SHIP CODES

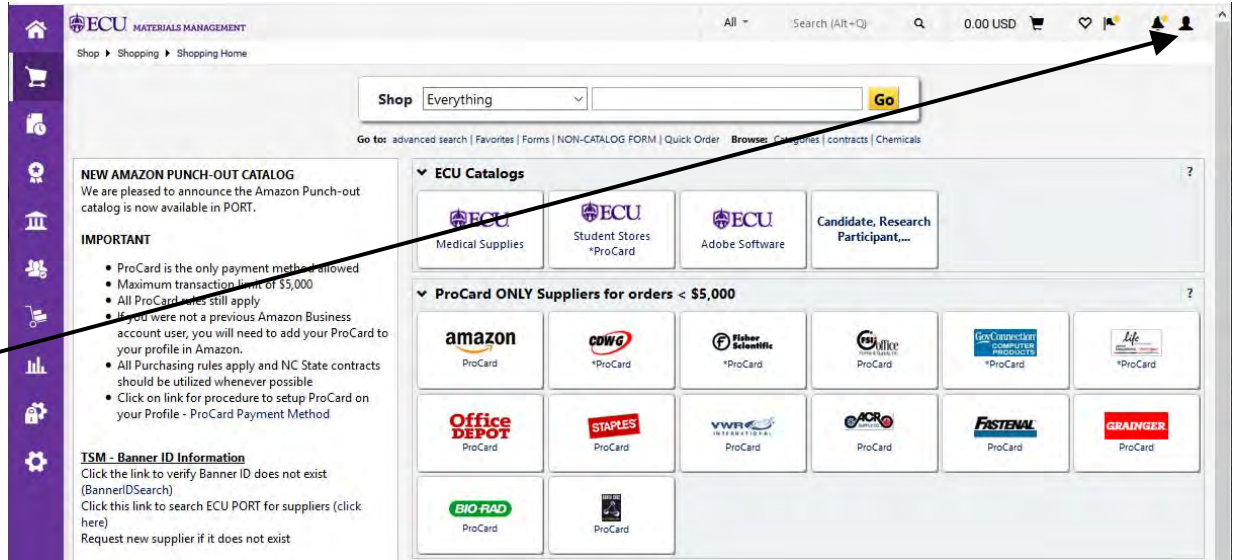
Last Updated on: 4/01/2020



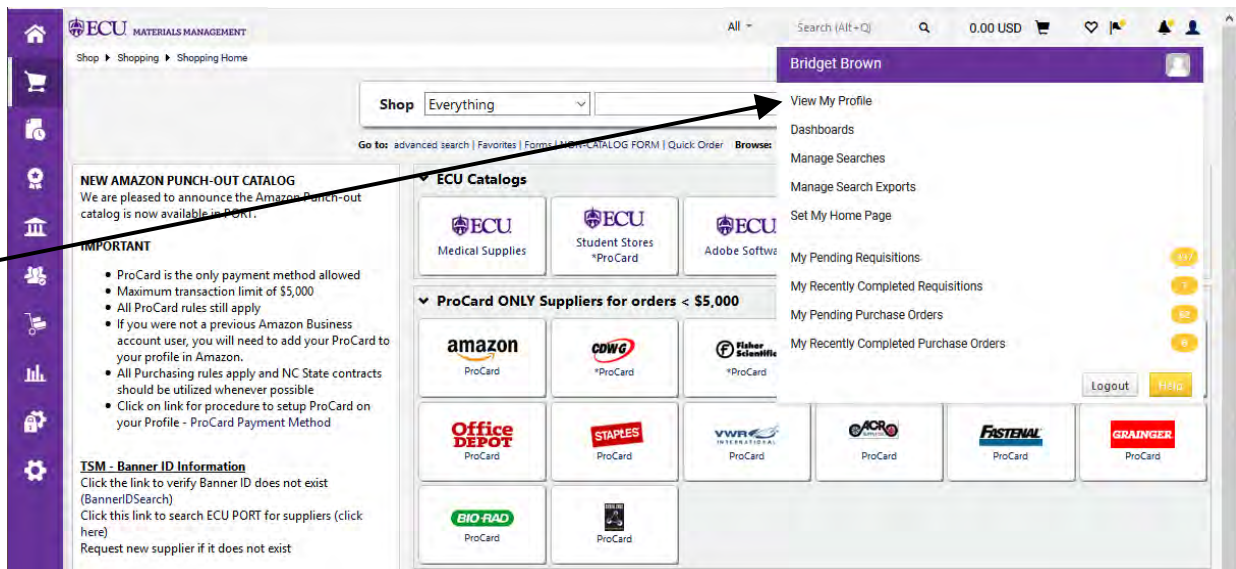
3. The ship code has been removed from your list of values for **Shipping Addresses**.
4. This completes the steps for this procedure. Click on the **ECU** icon to return to the home page.

SETTING ProCARD PAYMENT OPTION

Last Updated on: 4/02/2020



1. Click on **User icon**.



2. From fly-out menu, select **View My Profile**.

SETTING ProCARD PAYMENT OPTION

Last Updated on: 4/02/2020

ECU MATERIALS MANAGEMENT

All Search (Alt+Q) 0.00 USD

My Profile User's Name, Phone Number, Email, etc.

Bridget Brown

User Name brownb

User Profile and Preferences

- User's Name, Phone Number, Email, etc.
- Language, Time Zone and Display Settings
- App Activation Codes
- Early Access Participation
- Guided Tour Instructions
- Update Security Settings
- Default User Settings
- User Roles and Access
- Ordering and Approval Settings
- Permission Settings
- Notification Preferences
- User History

3.

User's Name, Phone Number, Email, etc.

First Name Bridget

Last Name Brown

Phone Number * +1 252-328-1013 ext. International phone numbers must begin with +

Mobile Phone Number International phone numbers must begin with +

Email Address * kornegaych@ecu.edu

Department * Administration and Finance (Administration and Finance)

Position -

Badge Id

Authentication Method Local

User Name * brownb

University Terms and Conditions accepted on 7/10/2019 9:08 AM System Messages

★ Required Save Changes

3. Click on the **Default User Settings** link.

ECU MATERIALS MANAGEMENT

All Search (Alt+Q) 0.00 USD

My Profile User's Name, Phone Number, Email, etc.

Bridget Brown

User Name brownb

User Profile and Preferences

- User's Name, Phone Number, Email, etc.
- Language, Time Zone and Display Settings
- App Activation Codes
- Early Access Participation
- Guided Tour Instructions
- Update Security Settings
- Default User Settings
- Custom Field and Accounting Code Defaults
- Default Addresses
- Checkout Settings
- Payment Options
- Chemical Location Defaults
- User Roles and Access
- Ordering and Approval Settings
- Permission Settings
- Notification Preferences
- User History

4.

User's Name, Phone Number, Email, etc.

First Name Bridget

Last Name Brown

Phone Number * +1 252-328-1013 ext. International phone numbers must begin with +

Mobile Phone Number International phone numbers must begin with +

Email Address * kornegaych@ecu.edu

Department * Administration and Finance (Administration and Finance)

Position -

Badge Id

Authentication Method Local

User Name * brownb

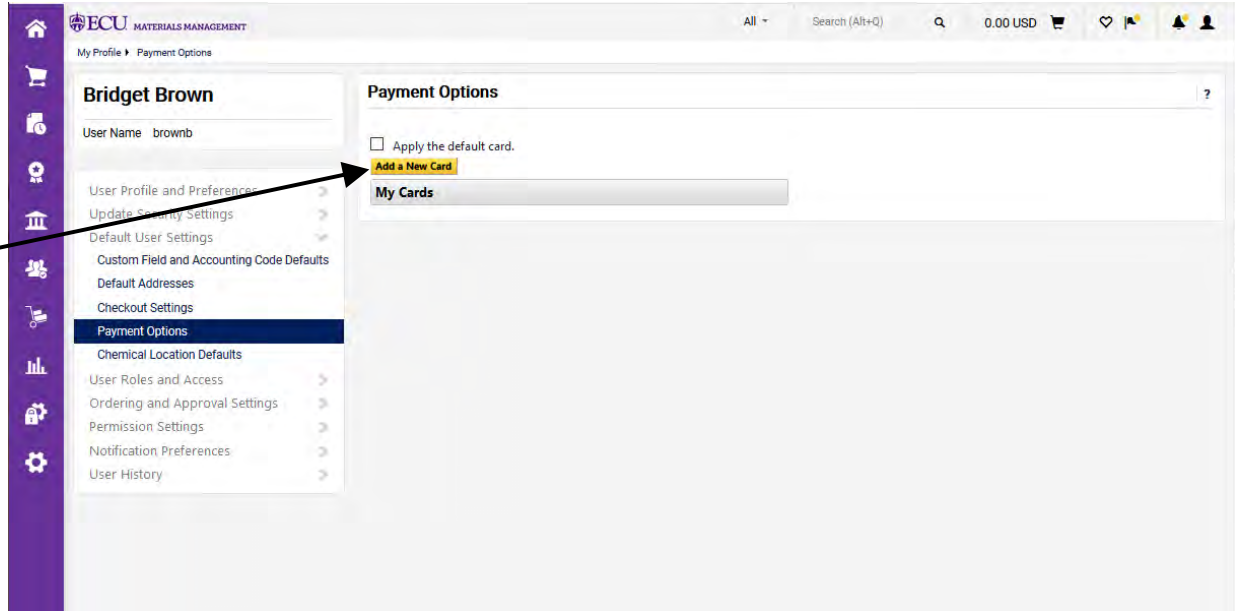
University Terms and Conditions accepted on 7/10/2019 9:08 AM System Messages

★ Required Save Changes

4. Click on **Payment Options** link.

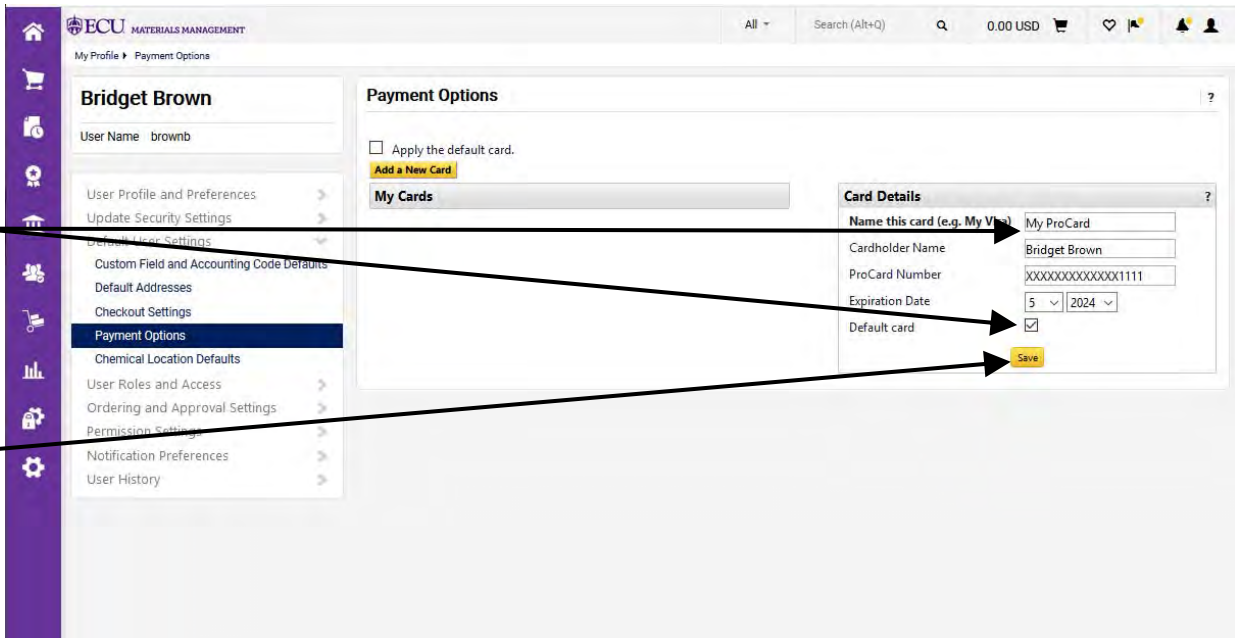
SETTING ProCARD PAYMENT OPTION

Last Updated on: 4/02/2020



5.

5. Click on **Add a New Card** button.



6.

7.

6. Enter Card Details information: Name this card, Cardholder Name, ProCard Number, Expiration Date, and Default card.

7. Click **Save** button.

SETTING ProCARD PAYMENT OPTION

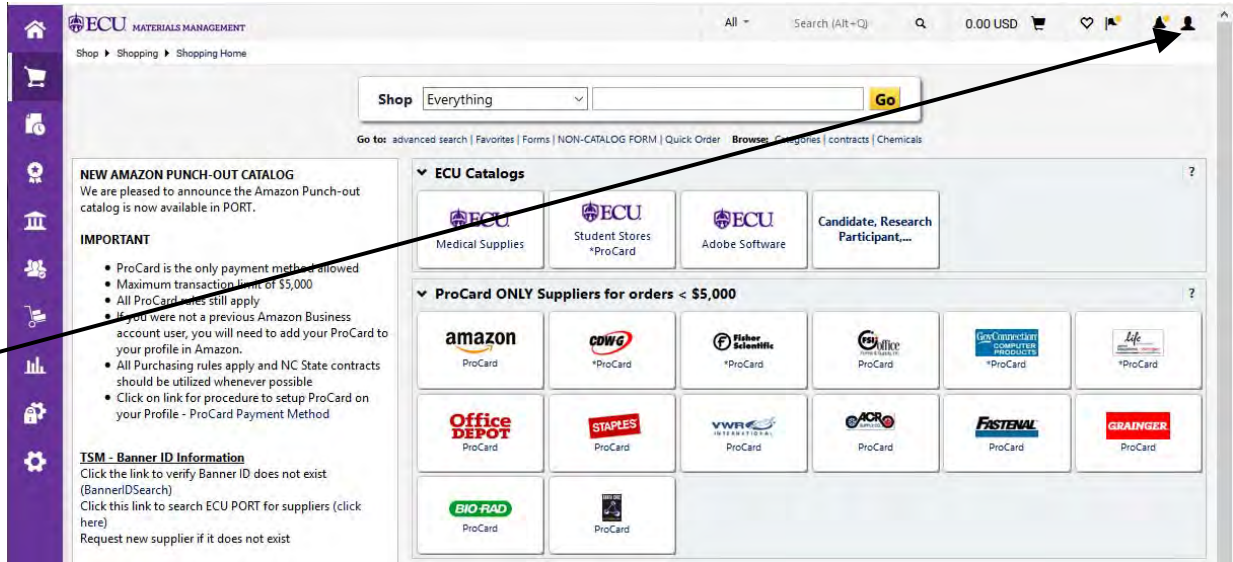
Last Updated on: 4/02/2020

The screenshot displays the 'ECU MATERIALS MANAGEMENT' interface. The top header shows 'All', 'Search (Alt+Q)', '0.00 USD', and user icons. The left navigation menu lists various settings, with 'Payment Options' highlighted. The main content area shows the 'Payment Options' for user 'Bridget Brown' (User Name: brownb). A checkbox labeled 'Apply the default card.' is checked. Below it is a section titled 'My Cards' with a yellow highlight on 'My ProCard'. To the right, the 'Card Details' section shows: Name this card (e.g. My Visa): My ProCard; Cardholder Name: Bridget Brown; ProCard Number: XXXXXXXXXXXXXXX1111; Expiration Date: 5 / 2024; Default card: . 'Save' and 'Remove' buttons are at the bottom of the Card Details section.

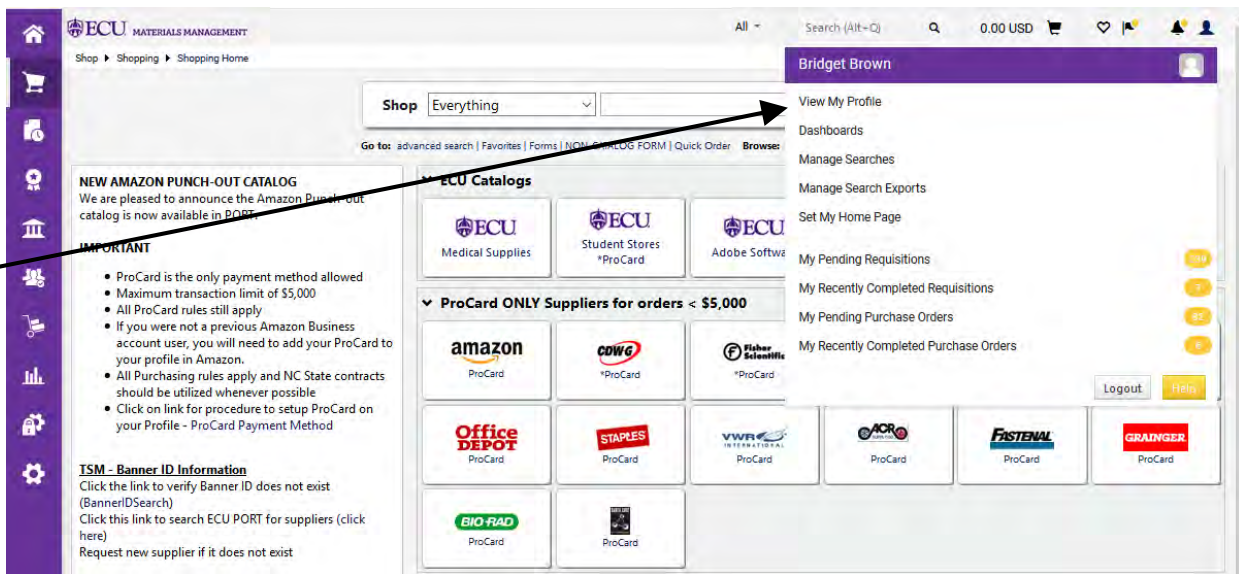
8. Note that **My ProCard** now displays in **My Cards**. You can now use this on orders for 10 suppliers that accept ProCard has a payment method in PORT.
9. Selecting **Apply the default card** check box will make your ProCard the default payment method for these suppliers: Amazon, Staples, Office Depot, Forms and Supply, CDW-G, GovConnection, Grainger, Fisher Scientific Co, Life Technologies, VWR, Fastenal, Bio-Rad, Santa Cruz Biotechnology, Henry Schein, ACR, and ECU Dowdy Student Stores.
10. This completes the steps for this procedure. Click on the **ECU** icon to return to the home page.

BOOKMARKS – CREATING, RENAMING, AND USING

Last Updated on: 4/01/2020



1. To utilize Bookmarks in PORT, you will need to navigate to a page that you would like to set up as a Bookmark. In this example, we will set up Default Addresses ship code page. Click on **User** icon.



2. From fly-out menu, select **View My Profile**.

BOOKMARKS – CREATING, RENAMING, AND USING

Last Updated on: 4/01/2020

ECU MATERIALS MANAGEMENT

All Search (Alt+Q) 0.00 USD

My Profile > User's Name, Phone Number, Email, etc.

Bridget Brown

User Name brownb

User Profile and Preferences

- User's Name, Phone Number, Email, etc.
- Language, Time Zone and Display Settings
- App Activation Codes
- Early Access Participation
- Guided Tour Instructions
- Update Security Settings
- Default User Settings
- User Roles and Access
- Ordering and Approval Settings
- Permission Settings
- Notification Preferences
- User History

User's Name, Phone Number, Email, etc.

First Name

Last Name

Phone Number * ext.

International phone numbers must begin with +

Mobile Phone Number

International phone numbers must begin with +

Email Address *

Department * Administration and Finance (Administration and Finance)

Position

Badge Id

Authentication Method Local

User Name * brownb

University Terms and Conditions accepted on 7/10/2019 9:08 AM System Messages

★ Required Save Changes

3. Click on **Default User Settings** link.

ECU MATERIALS MANAGEMENT

All Search (Alt+Q) 0.00 USD

My Profile > User's Name, Phone Number, Email, etc.

Bridget Brown

User Name brownb

User Profile and Preferences

- User's Name, Phone Number, Email, etc.
- Language, Time Zone and Display Settings
- App Activation Codes
- Early Access Participation
- Guided Tour Instructions
- Update Security Settings
- Default User Settings
- Custom Field and Accounting Code Defaults
- Default Addresses
- Checkout Settings
- Payment Options
- Chemical Location Defaults
- User Roles and Access
- Ordering and Approval Settings
- Permission Settings
- Notification Preferences
- User History

User's Name, Phone Number, Email, etc.

First Name

Last Name

Phone Number * ext.

International phone numbers must begin with +

Mobile Phone Number

International phone numbers must begin with +

Email Address *

Department * Administration and Finance (Administration and Finance)

Position

Badge Id

Authentication Method Local

User Name * brownb

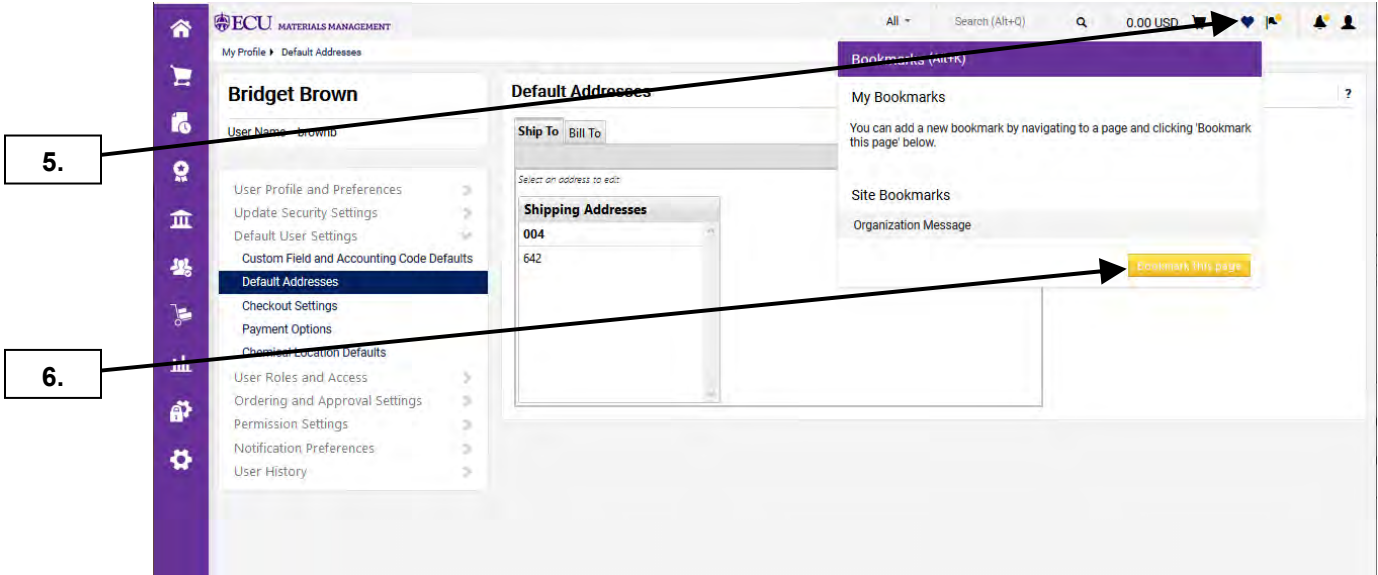
University Terms and Conditions accepted on 7/10/2019 9:08 AM System Messages

★ Required Save Changes

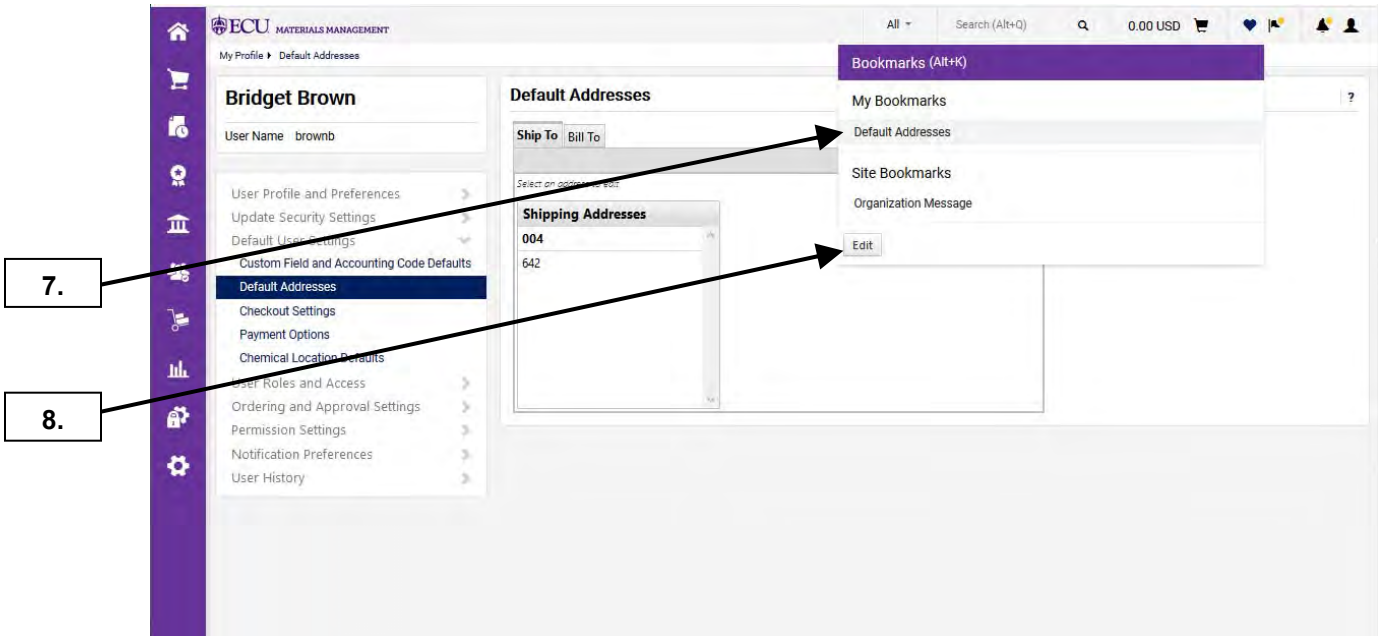
4. Click on **Default Addresses** link.

BOOKMARKS – CREATING, RENAMING, AND USING

Last Updated on: 4/01/2020



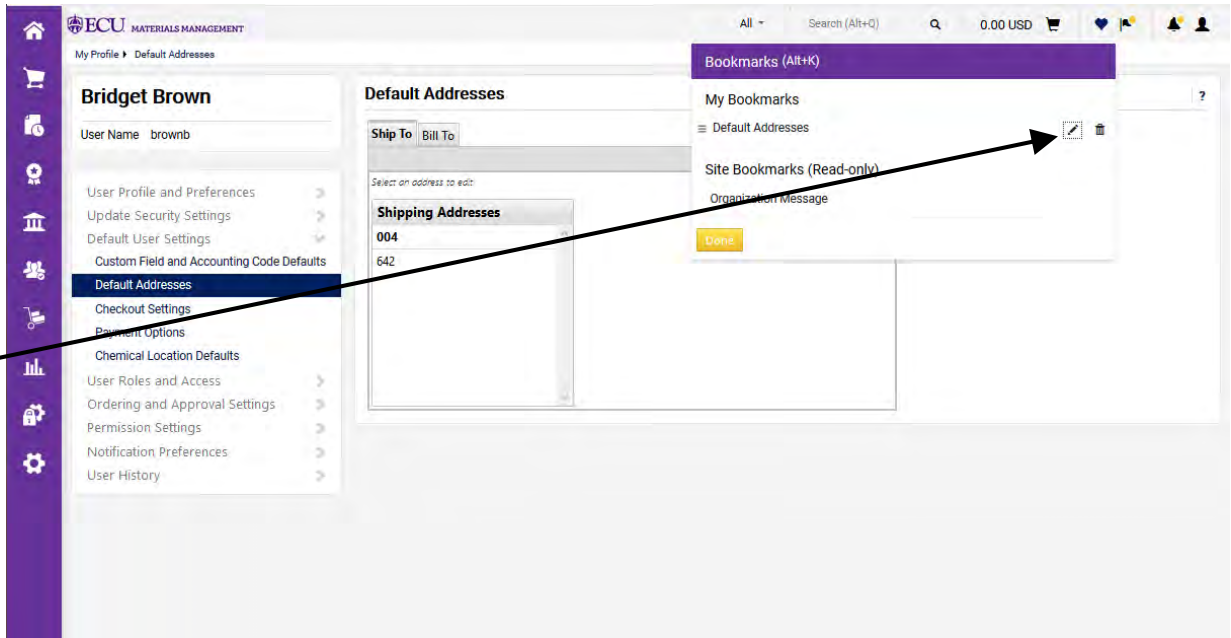
5. Click on **heart** and **Bookmarks** fly-out menu will be displayed.
6. Click on **Bookmark this page** link.



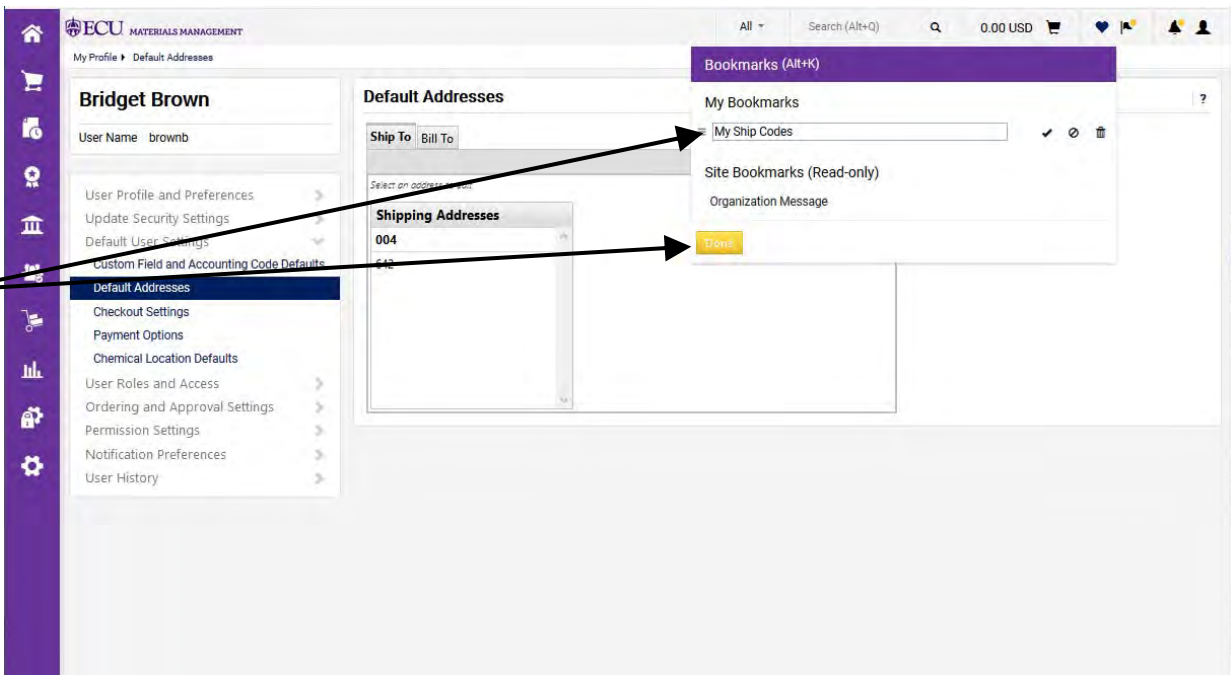
7. Note that new bookmark has been created.
8. To personalize the bookmark name, click on **Edit** button.

BOOKMARKS – CREATING, RENAMING, AND USING

Last Updated on: 4/01/2020



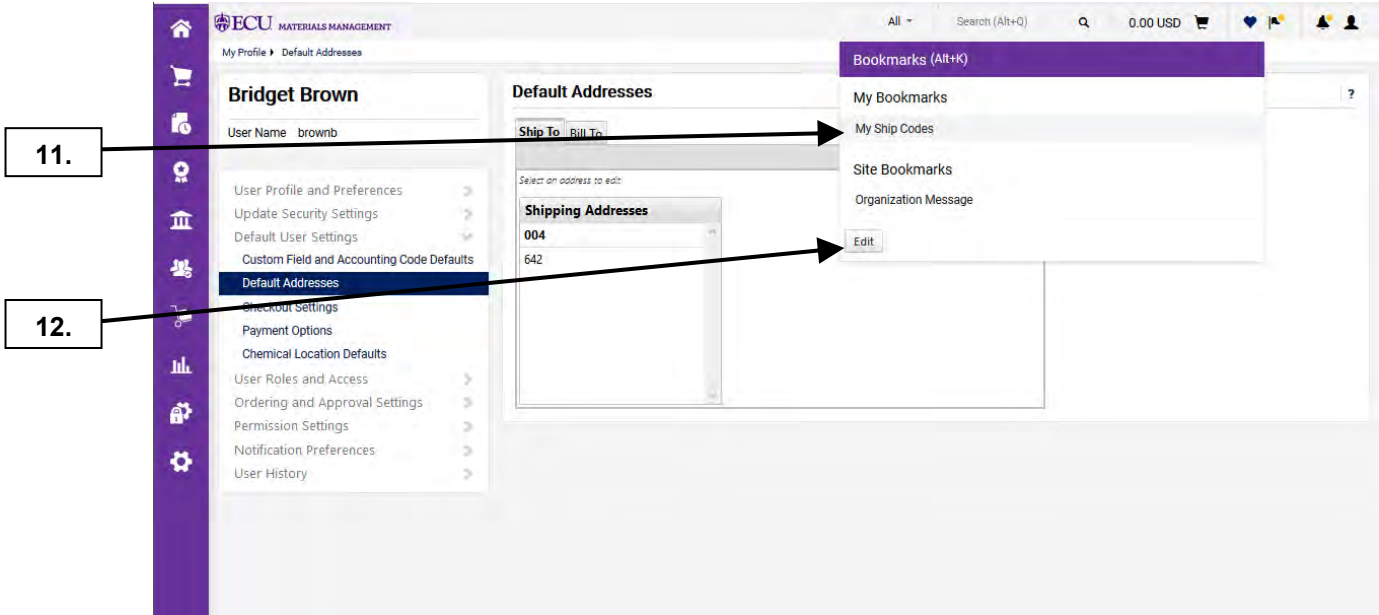
9. Click on the **Rename** icon.



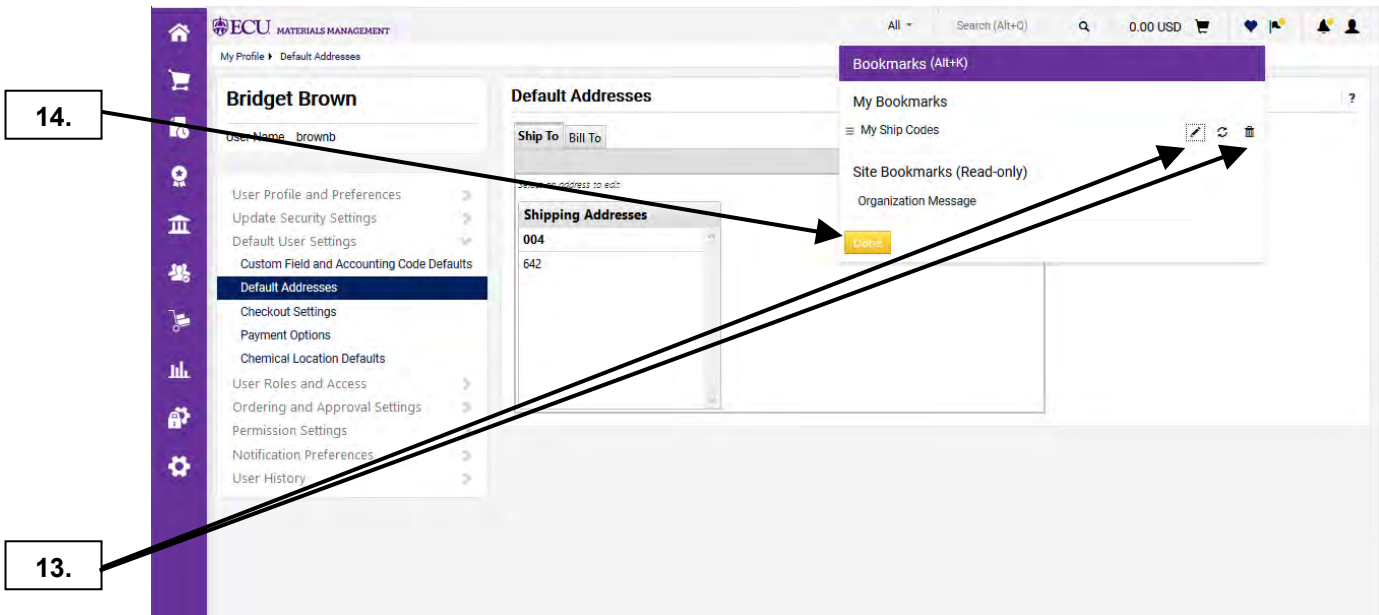
10. Rename bookmark and click **Done** button.

BOOKMARKS – CREATING, RENAMING, AND USING

Last Updated on: 4/01/2020



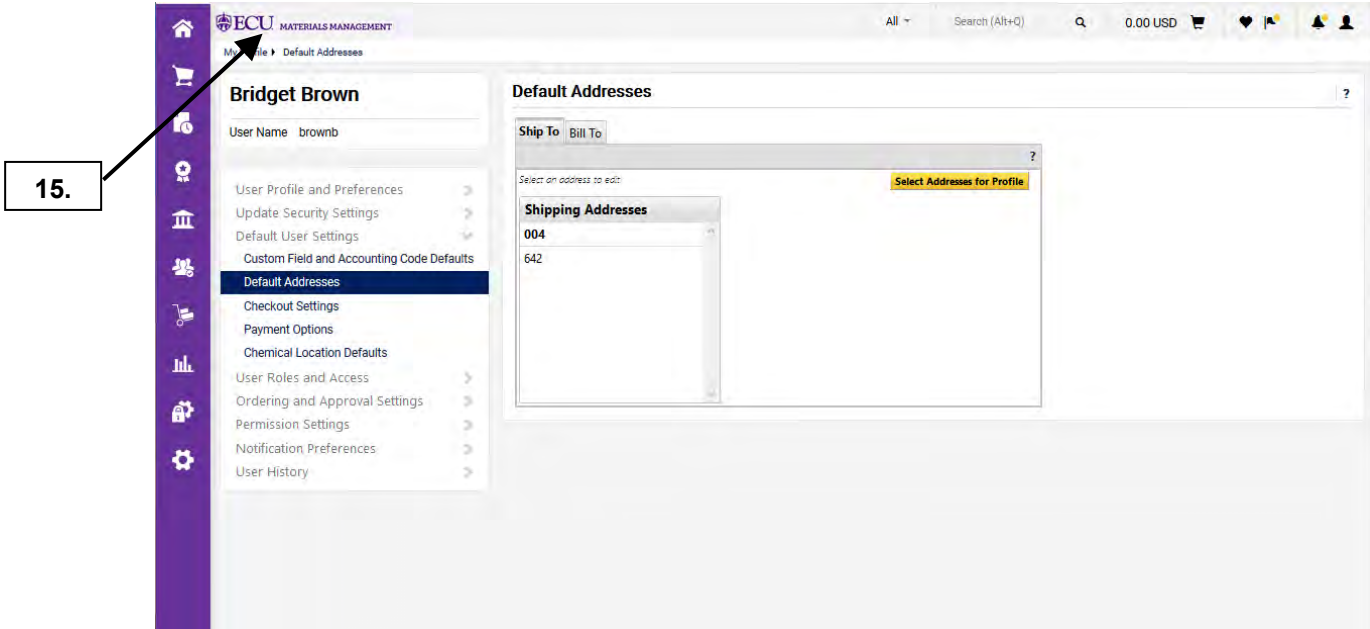
- 11. Note that the bookmark name has been updated.
- 12. To make corrections/changes, click on **Edit** button.



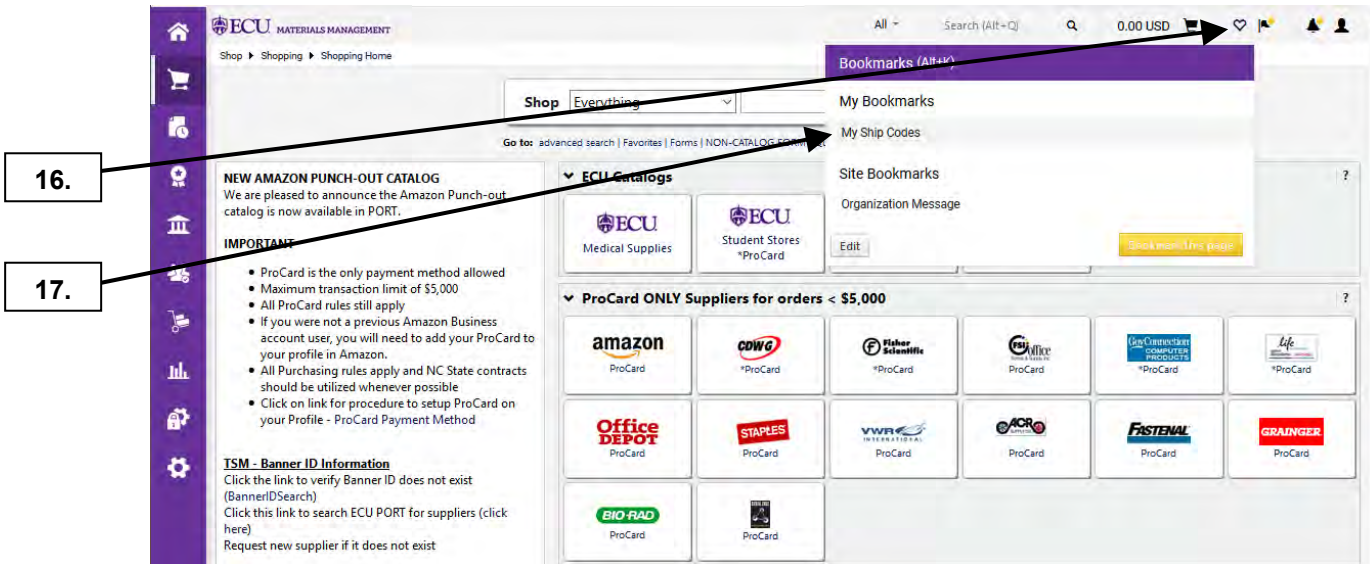
- 13. Note that you can **Rename**, **Reset**, or **Remove** the bookmark.
- 14. Click **Done** button.

BOOKMARKS – CREATING, RENAMING, AND USING

Last Updated on: 4/01/2020



15. Click on **ECU** icon to go to PORT home page.

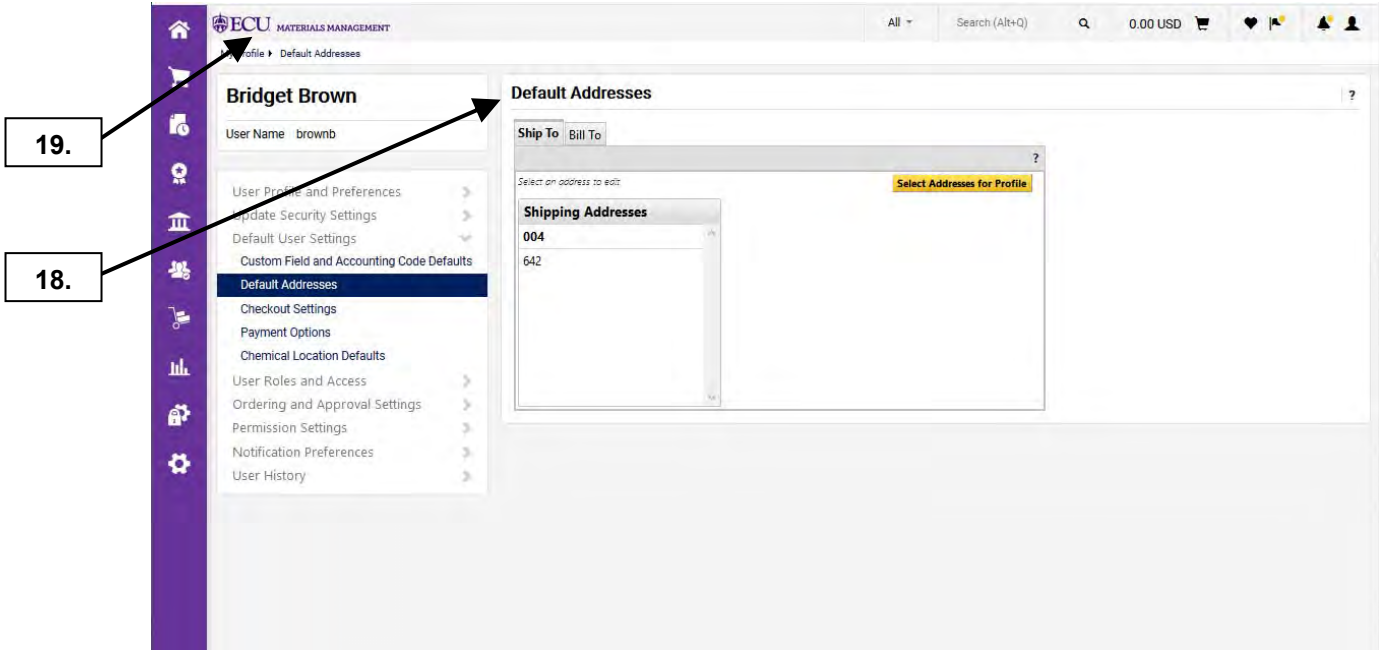


16. Click on **heart** and **Bookmarks** fly-out menu will be displayed.

17. Click on your **Bookmark**.

BOOKMARKS – CREATING, RENAMING, AND USING

Last Updated on: 4/01/2020

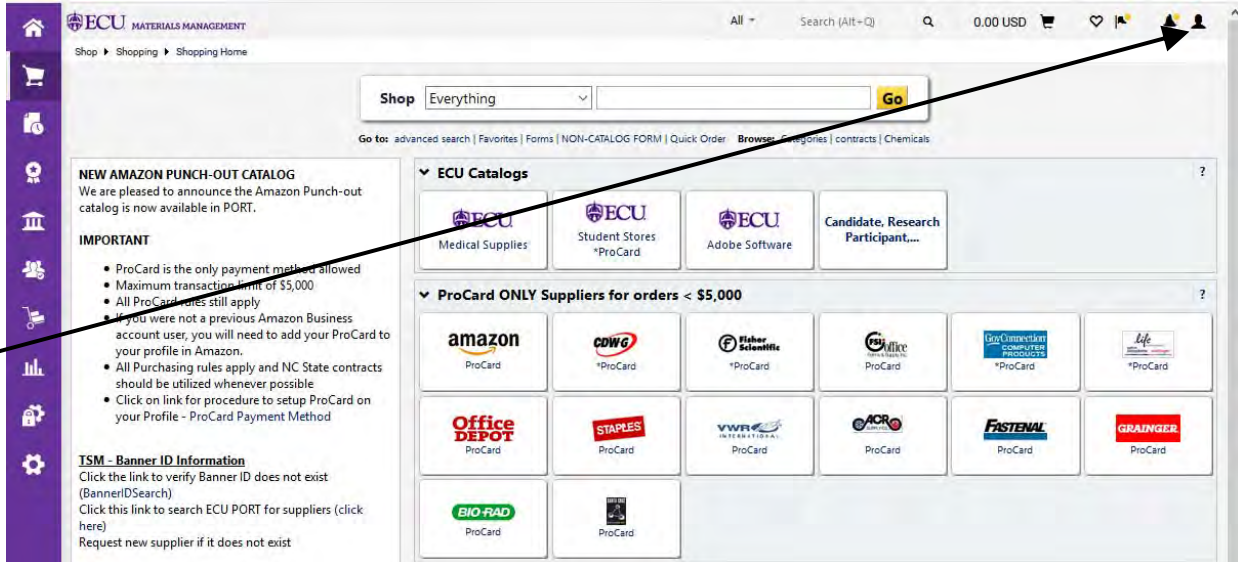


18. The bookmark takes you to **Default Addresses** ship code page.

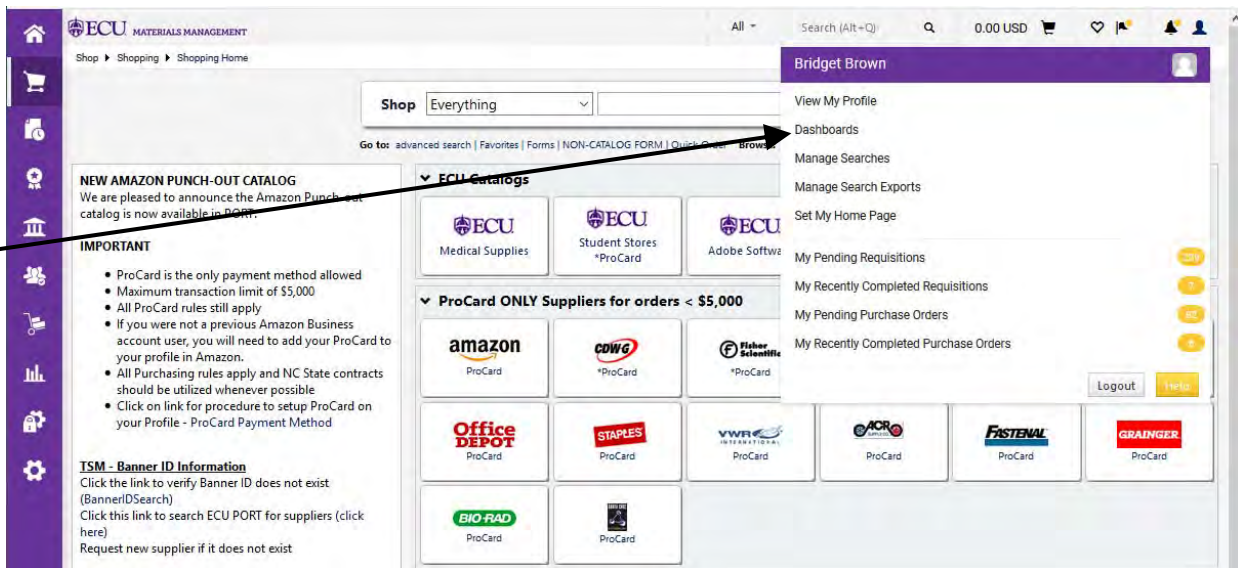
19. This completes the steps for using this procedure. Click on **ECU** icon to return to home page.

CREATING PERSONAL DASHBOARD

Last Updated on: 4/02/2020



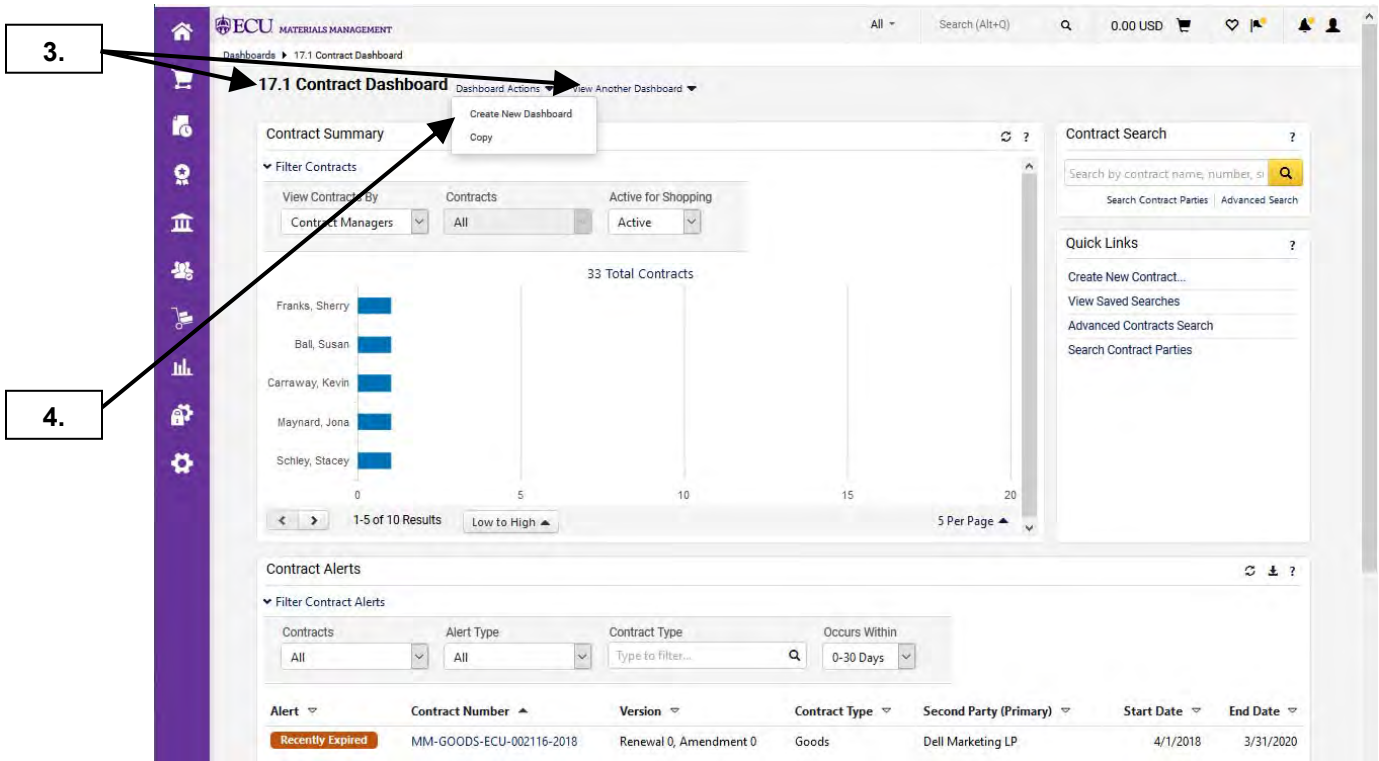
1. By utilizing configurable dashboards, you can emphasize important task and reduce the time it takes to search for features and menus. To create a Personal Dashboard, click on **User** icon.



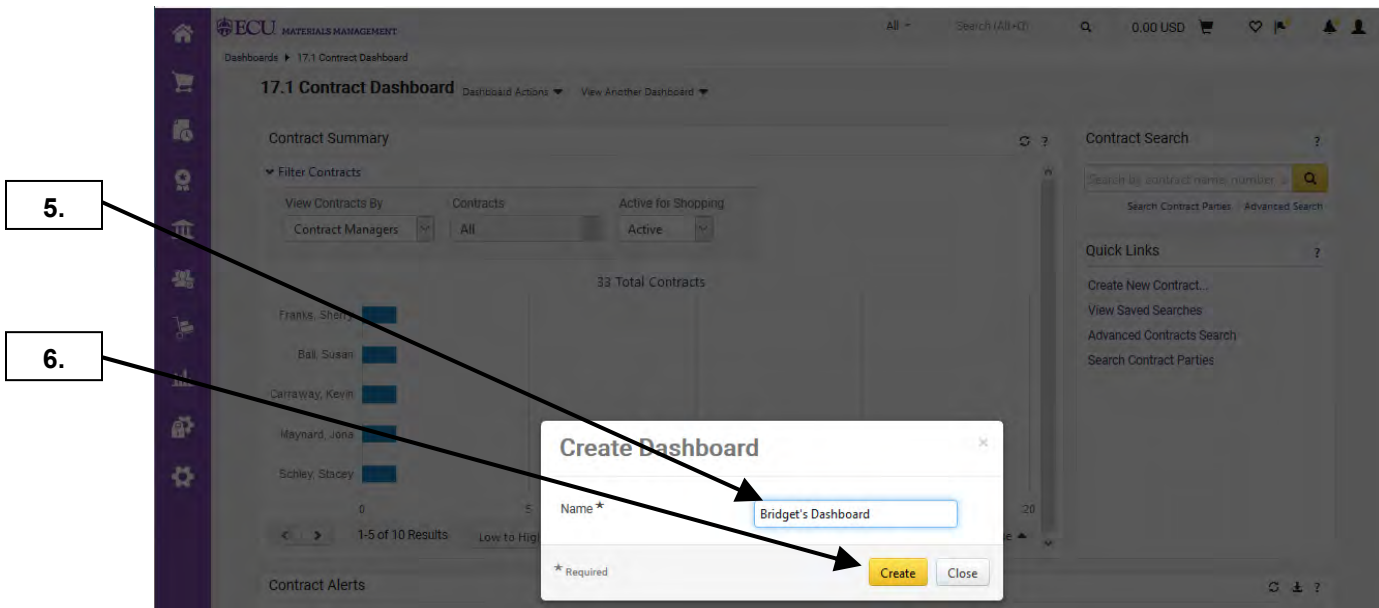
2. From fly-out menu, select **Dashboards**.

CREATING PERSONAL DASHBOARD

Last Updated on: 4/02/2020



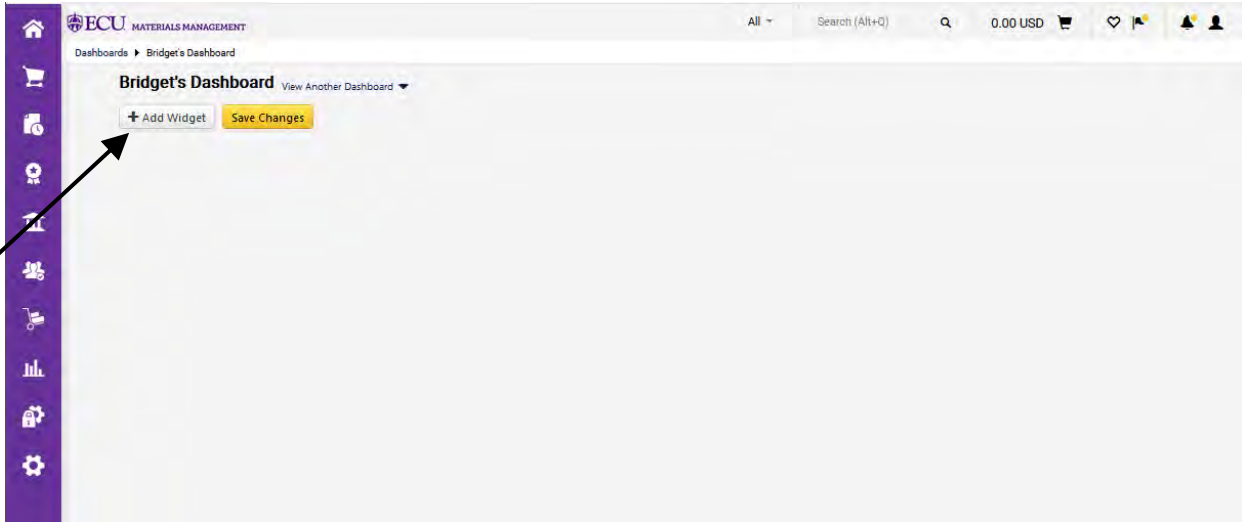
3. Default Dashboards can be found under the drop-down menu View Another Dashboard.
4. For this example, we will create a personal Dashboard. Click on **Create Dashboard** under the **Dashboard Actions** dropdown menu.



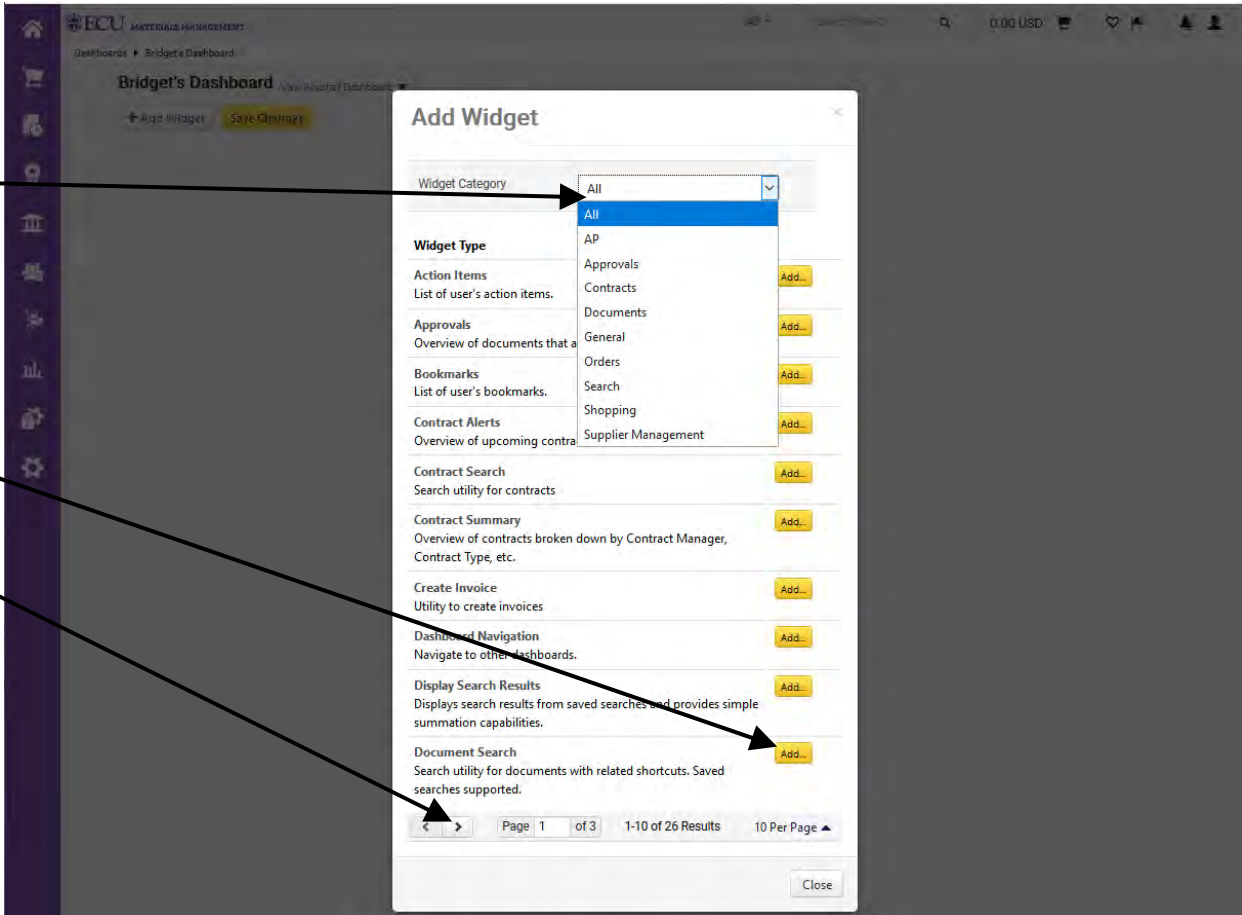
5. Enter an appropriate **Dashboard** name.
6. Click on **Create** button.

CREATING PERSONAL DASHBOARD

Last Updated on: 4/02/2020



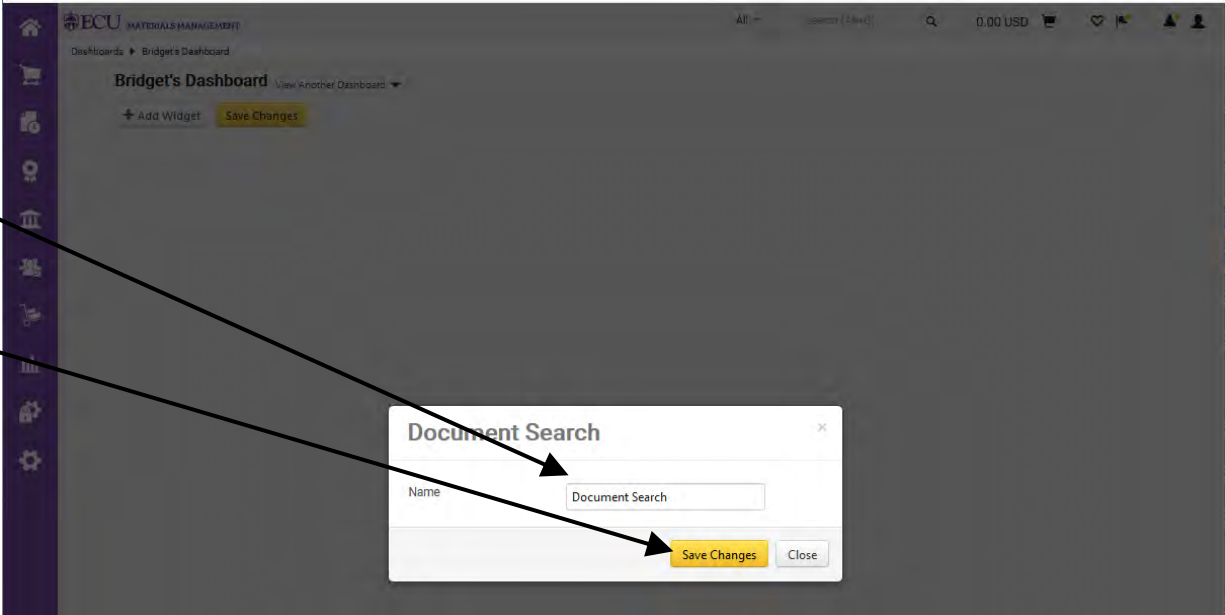
7. Click on + **Add Widget** button.



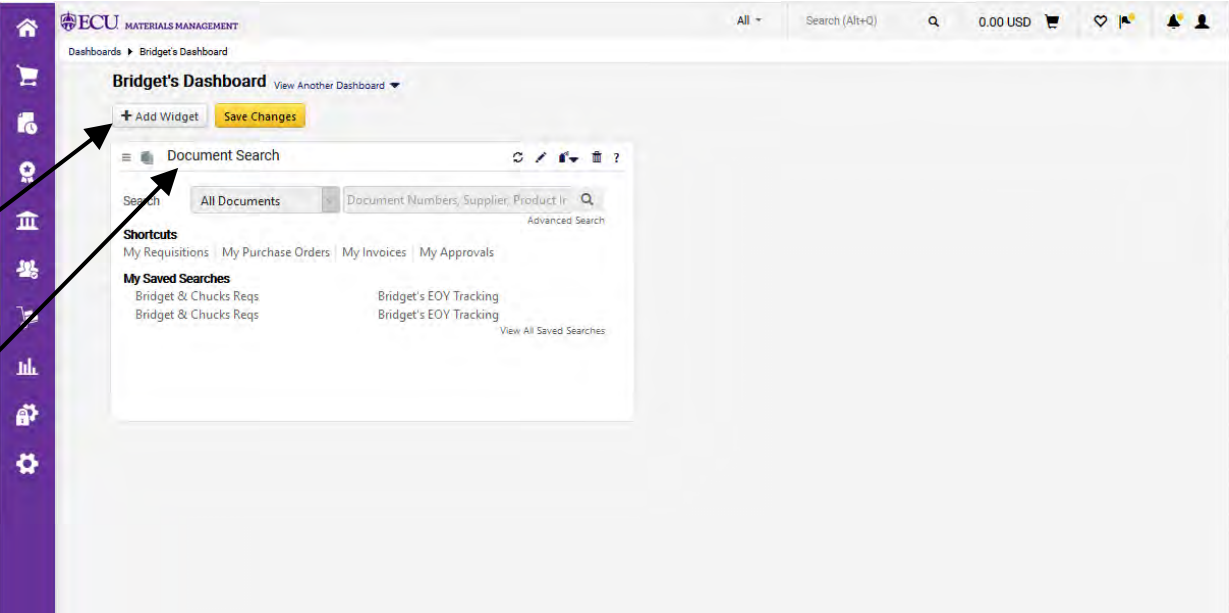
- 8. You can select a **Widget Category** from the drop-down box to refine results.
- 9. With All Category selected, you see all options by clicking through the pages.
- 10. Select desired **Widget Type** and click the **Add...** button.

CREATING PERSONAL DASHBOARD

Last Updated on: 4/02/2020



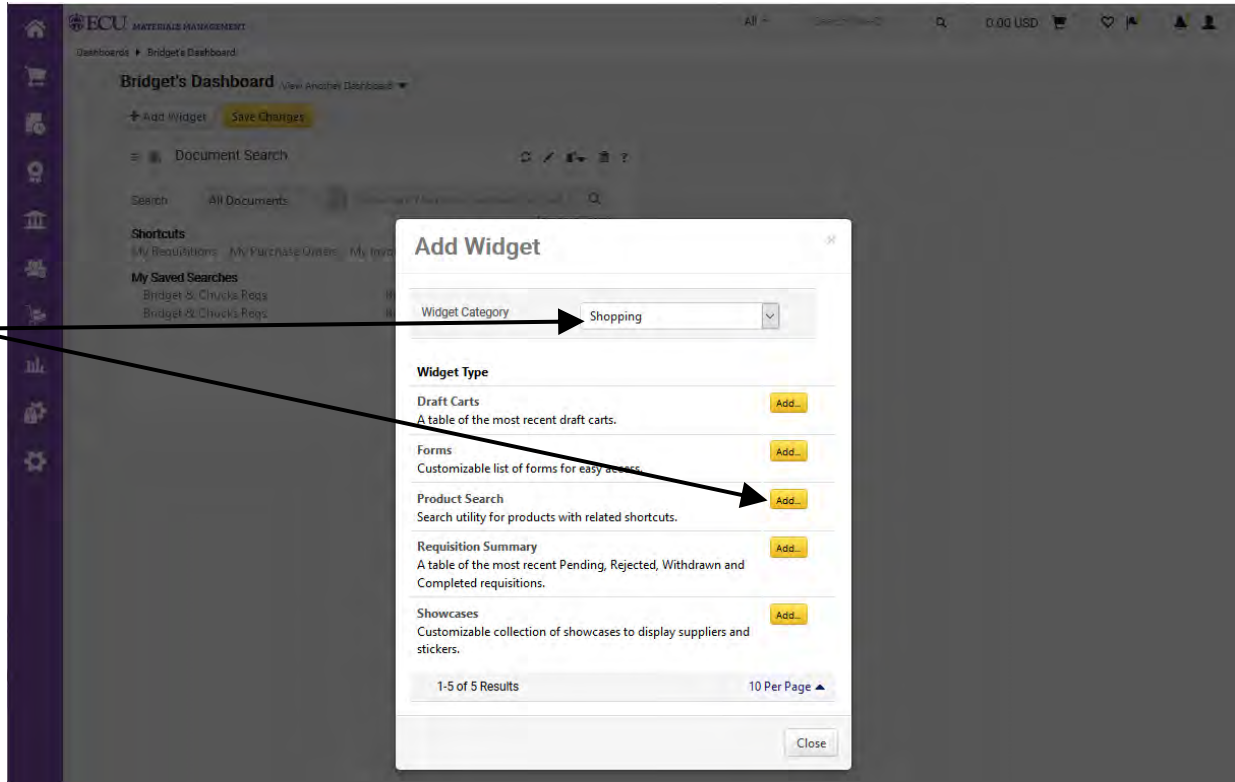
- 11. You can change **Name** of widget or use default name.
- 12. Click **Save Changes** button.



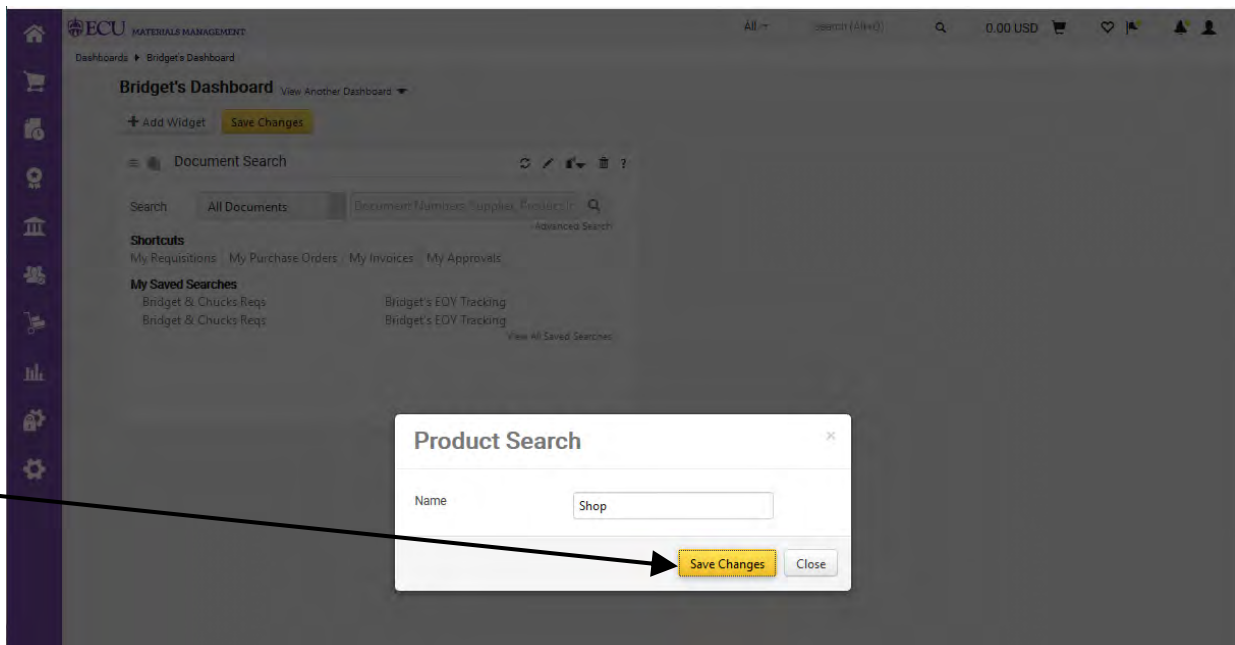
- 13. Note that new widget has been added to dashboard.
- 14. Click on + **Add Widget** button.

CREATING PERSONAL DASHBOARD

Last Updated on: 4/02/2020



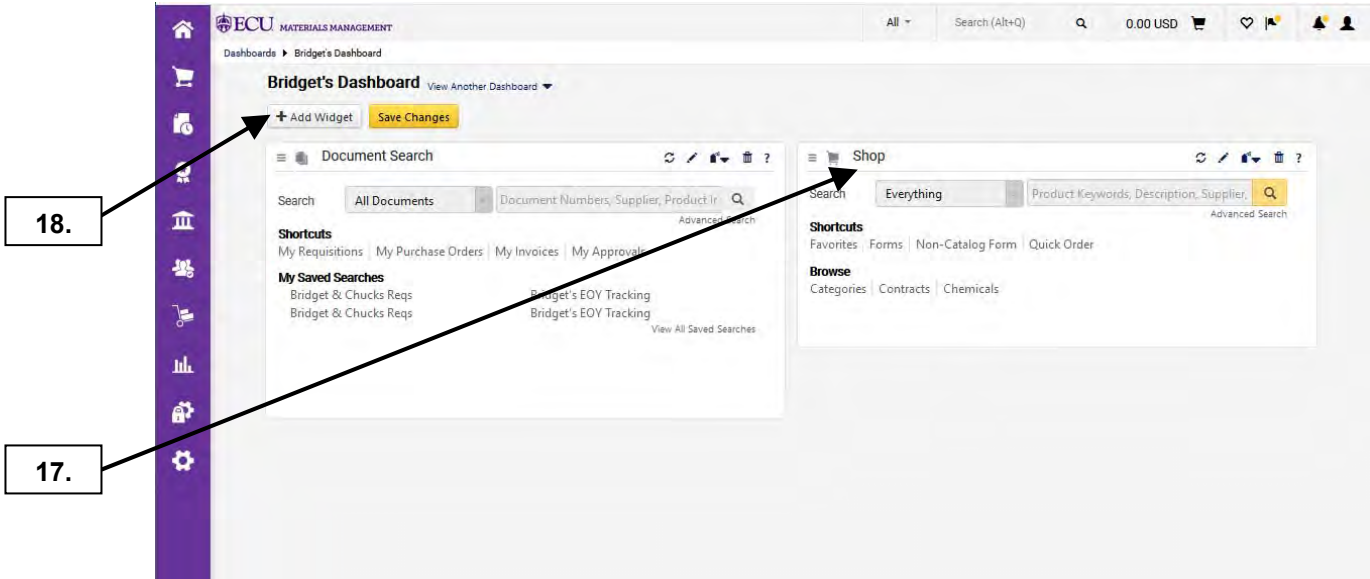
15. After selecting desired **Widget Category** from the drop-down box, click **Add...** button corresponding with the desired **Widget Type**. For this example, we will use the Shopping **Widget Category** and select the **Product Search** widget.



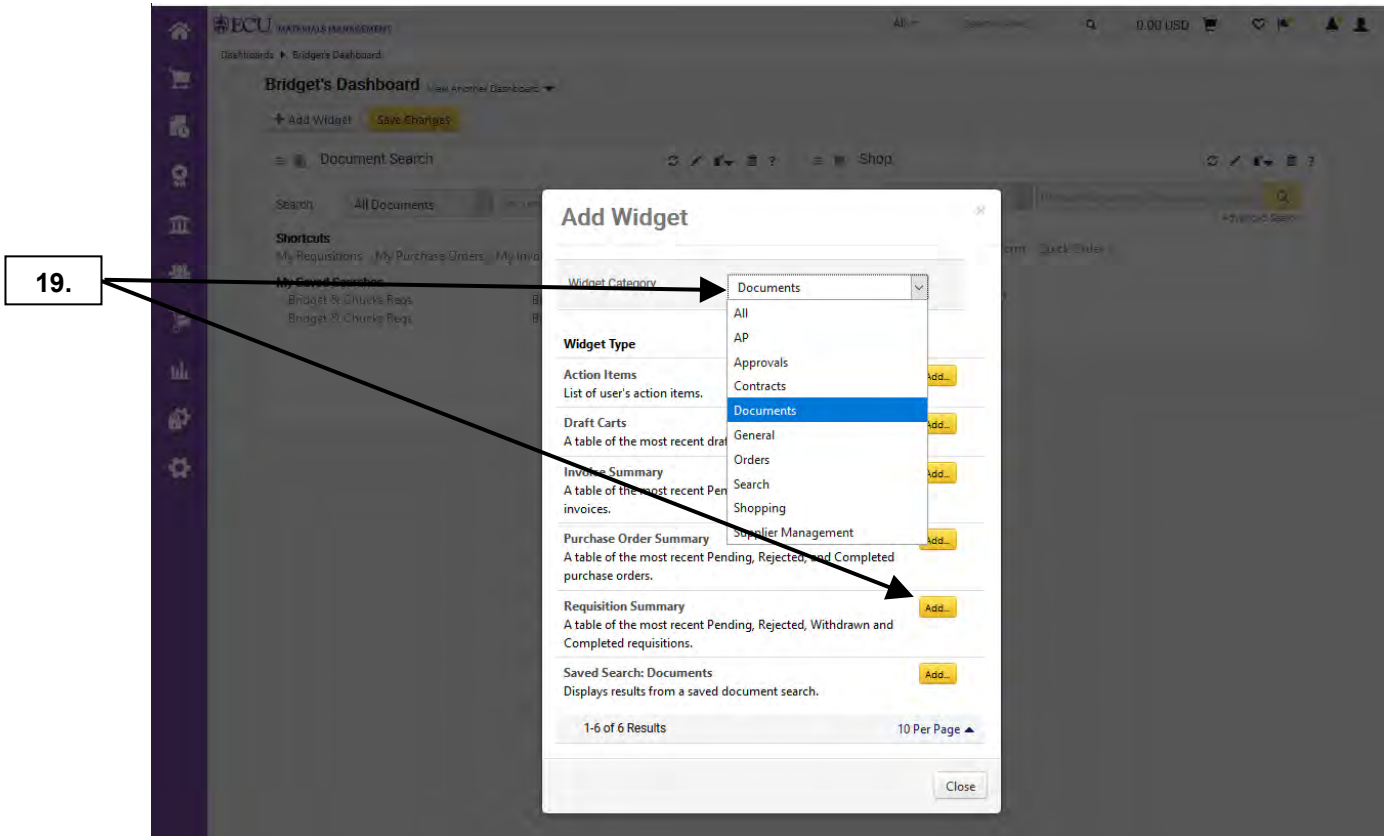
16. Click **Save Changes** button.

CREATING PERSONAL DASHBOARD

Last Updated on: 4/02/2020



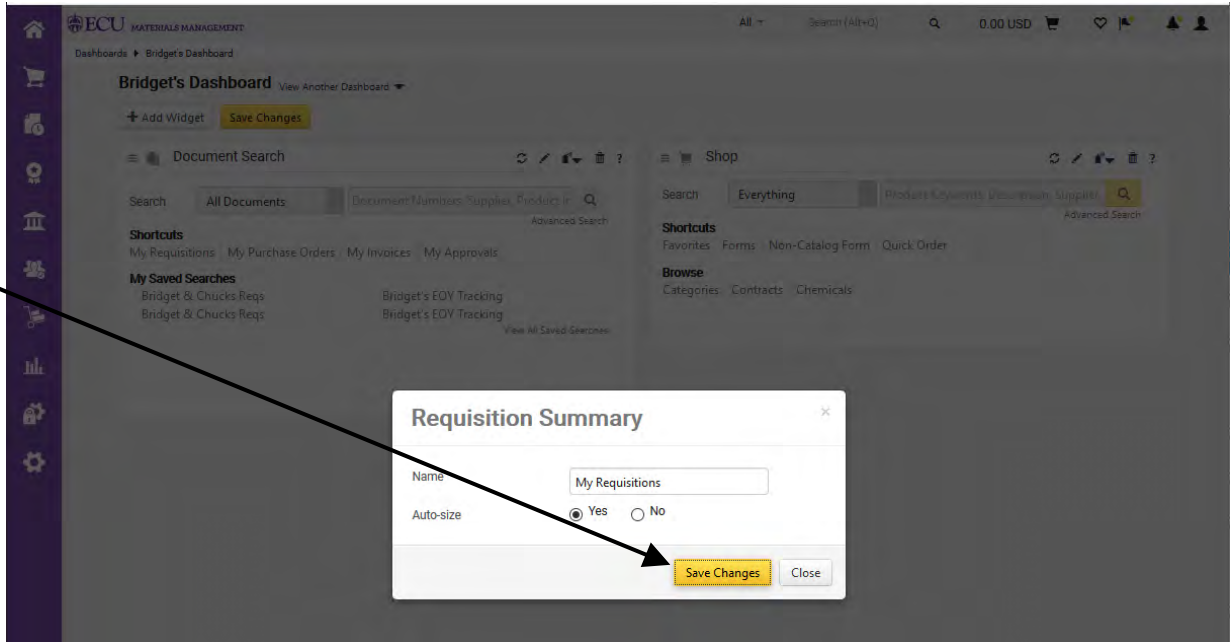
- 17. Note new widget has been added to dashboard.
- 18. Click on **Add Widget** button.



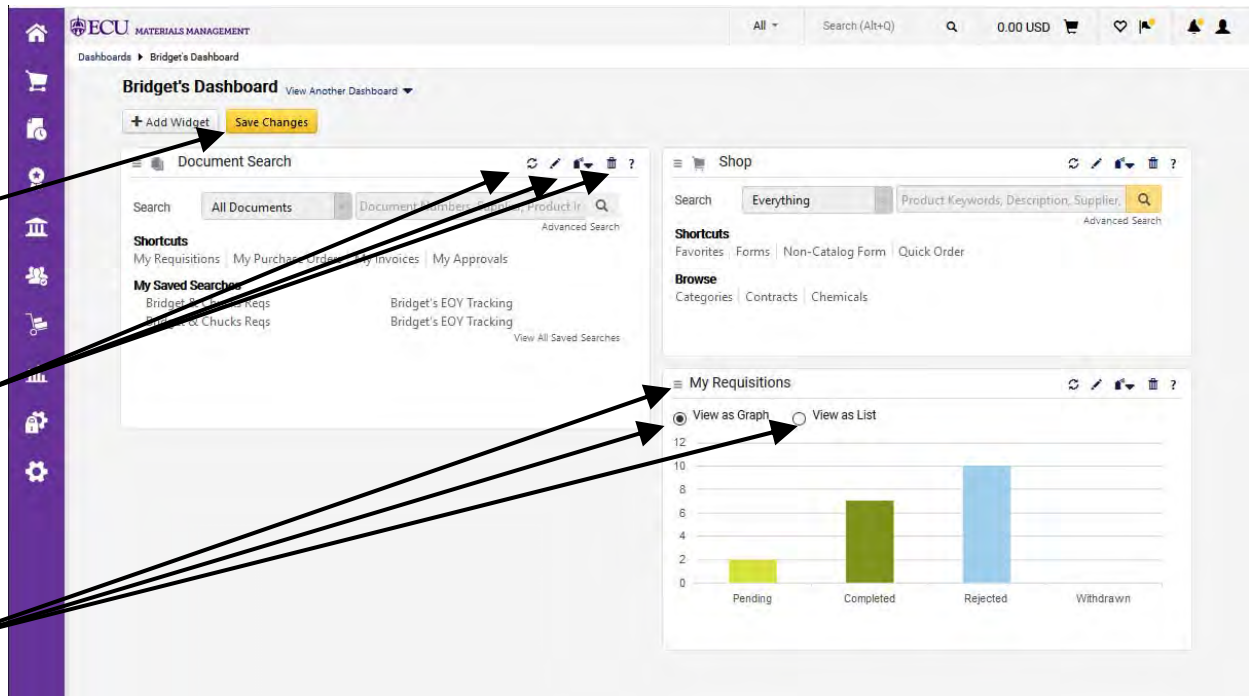
- 19. After selecting desired **Widget Category**, select another **Widget Type** and click the **Add...** button. For this example, we will use the Documents **Widget Category** and select the **Requisition Summary** widget.

CREATING PERSONAL DASHBOARD

Last Updated on: 4/02/2020



20. Click **Save Changes** button.



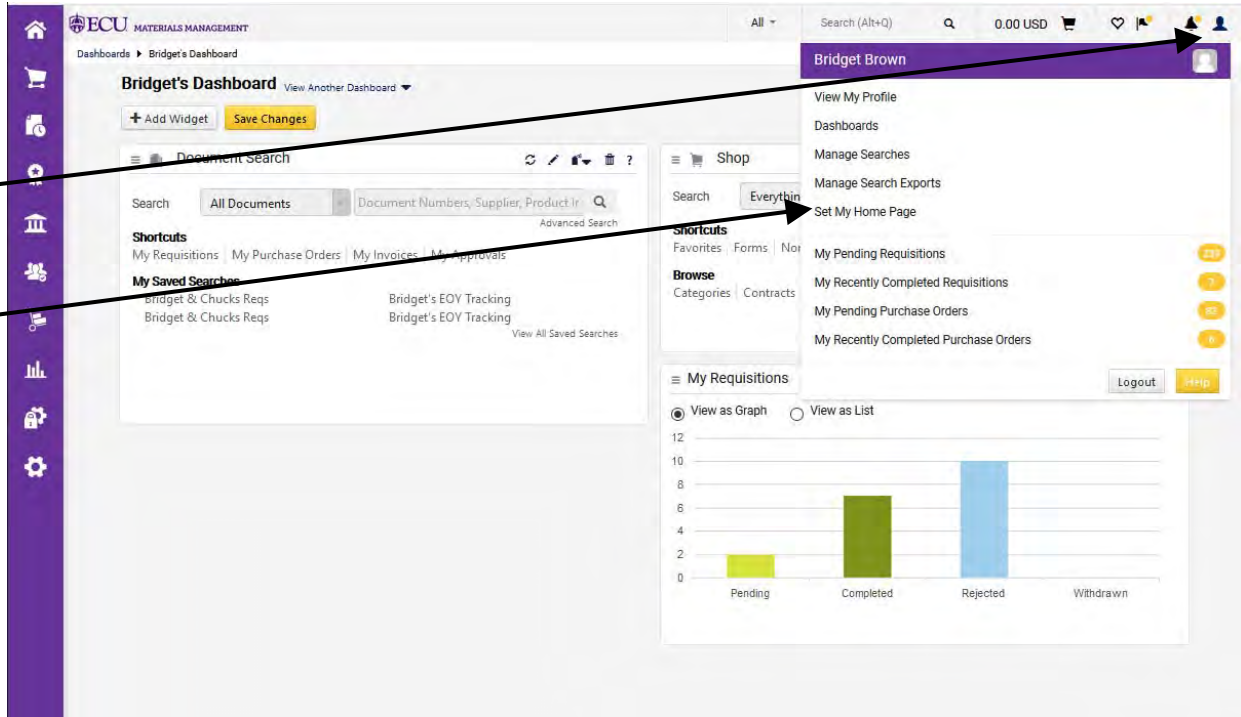
21. Note new widget has been added to dashboard. You can view **My Purchase Orders** in graph or list form.

22. Note that you can refresh, edit, or delete each widget on your dashboard.

23. Once your finished adding widgets, click **Save Changes** button.

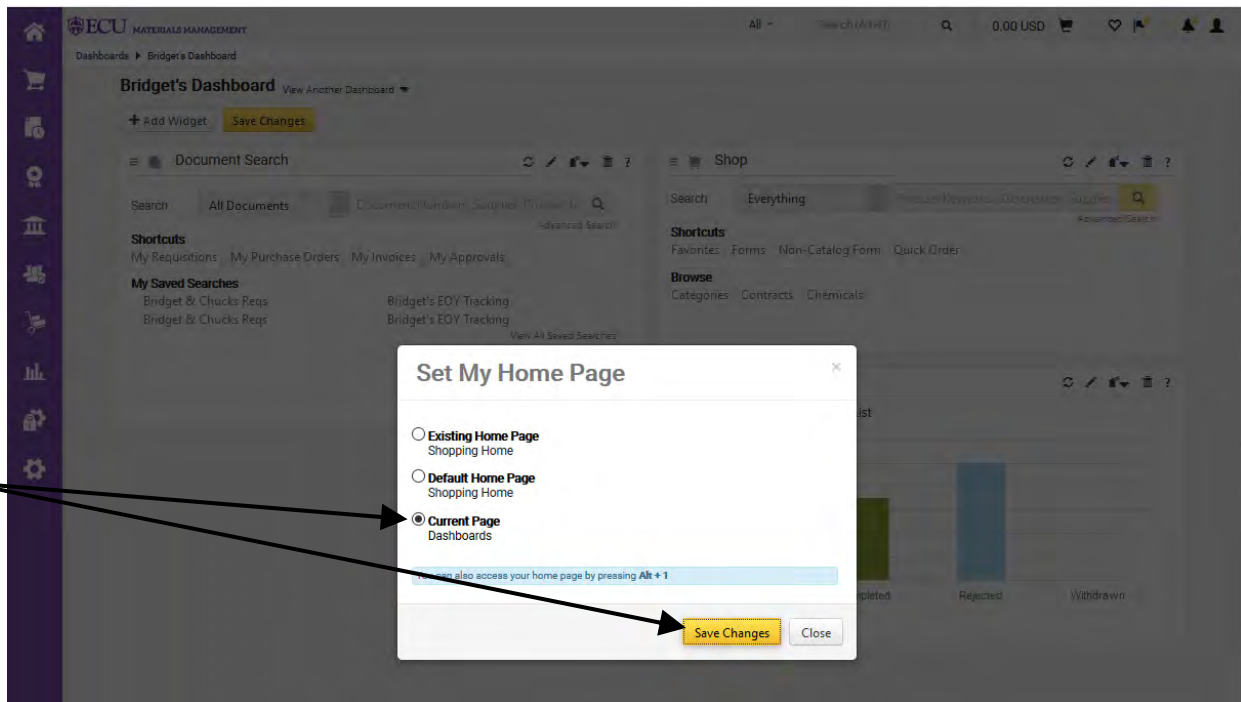
CREATING PERSONAL DASHBOARD

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24. This completes steps for creating personal Dashboard. The following steps will show you how to set dashboard to home page. Click on your username to see the fly-out menu.

25. Click on **Set My Home Page** link.



26. Note that it defaults to current page. Click **Save Changes** button to set **Dashboard** as Home Page. To reset home back to Shopping Home, repeat steps 24 - 26 with **Default Home Page** selected.

CREATING PERSONAL DASHBOARD

Last Updated on: 4/02/2020

27.

The screenshot displays the ECU Materials Management interface. At the top, the header includes the ECU logo, 'MATERIALS MANAGEMENT', and user information like 'All', 'Search (Alt+Q)', and '0.00 USD'. The main content area is titled 'Bridget's Dashboard' and features several widgets: 'Document Search', 'Shop', and 'My Requisitions'. The 'My Requisitions' widget shows a bar chart with the following data:

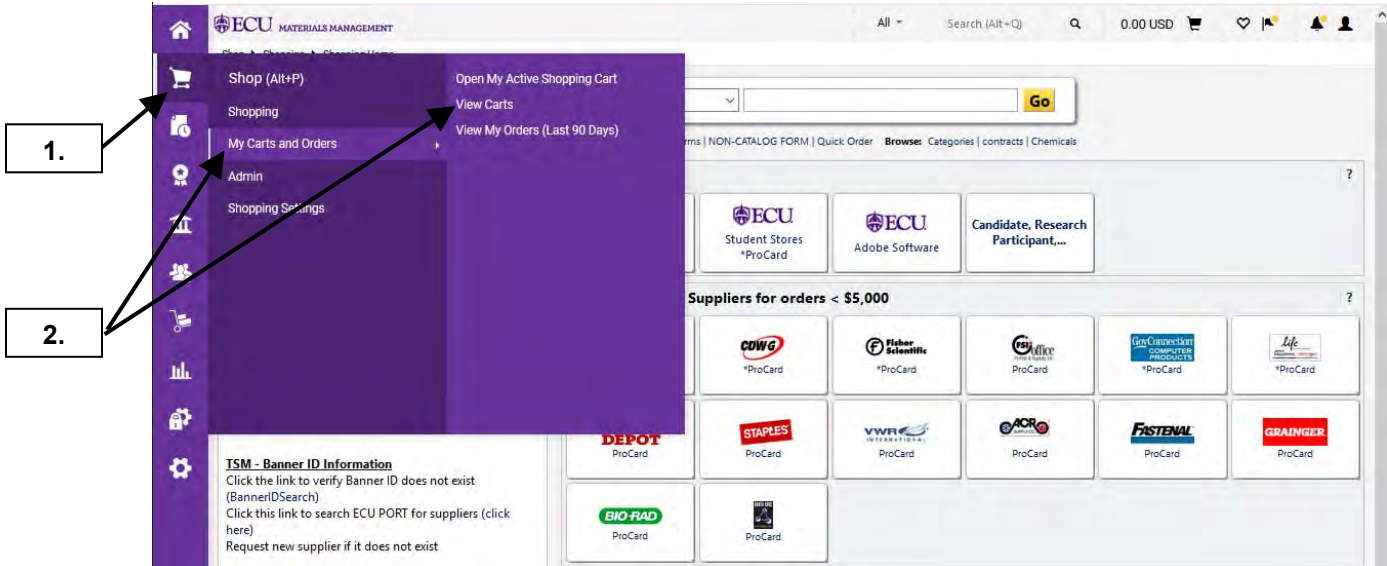
Category	Count
Pending	2
Completed	7
Rejected	10
Withdrawn	0

A sidebar on the left contains a vertical menu of icons. An arrow points from the number '27.' in a box to the ECU logo icon at the top of this sidebar.

27. This completes the steps for using this procedure. Click on the **ECU** icon to return to home page.

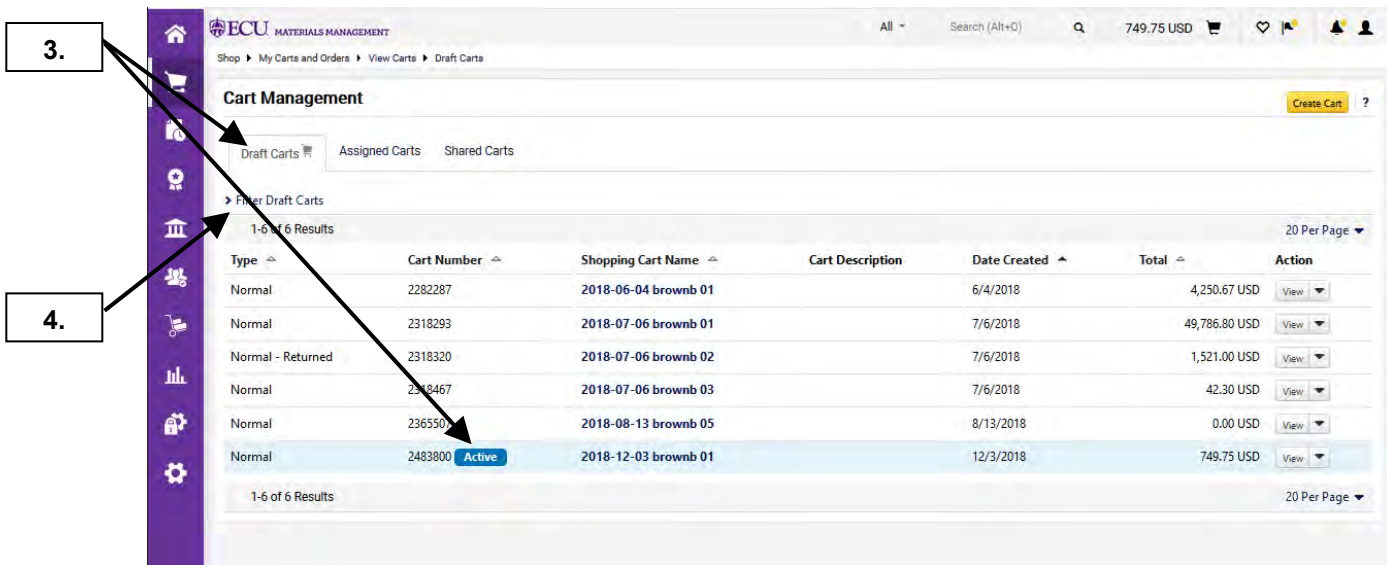
SHOPPING CART MANAGEMENT PAGE

Last Updated on: 4/02/2020



Shopping Cart Management Page helps to organize carts into 3 separate tabs: **Drafts Carts**, **Assigned Carts**, and **Shared Carts**. In addition, you have the ability to filter carts on each tab.

1. To access from the Home page, click on **Shop**.
2. Select **My Carts and Orders** from fly-out menu and click on **View Carts**.



3. With Draft Carts tab open, you will see an indicator show which cart is **Active**.
4. To filter carts within a tab, click on **Filter Draft Carts**.

SHOPPING CART MANAGEMENT PAGE

Last Updated on: 4/02/2020

The screenshot shows the 'Cart Management' interface with the 'Draft Carts' tab selected. The filter section includes fields for Cart Name, Cart Number, Date Created, Cart Type, and Cart Status. A table below displays 6 results with columns for Type, Cart Number, Shopping Cart Name, Cart Description, Date Created, Total, and Action. The last row is highlighted in blue and marked as 'Active'.

Type	Cart Number	Shopping Cart Name	Cart Description	Date Created	Total	Action
Normal	2282287	2018-06-04 brownb 01		6/4/2018	4,250.67 USD	View
Normal	2318293	2018-07-06 brownb 01		7/6/2018	49,786.80 USD	View
Normal - Returned	2318320	2018-07-06 brownb 02		7/6/2018	1,521.00 USD	View
Normal	2318467	2018-07-06 brownb 03		7/6/2018	42.30 USD	View
Normal	2365507	2018-08-13 brownb 05		8/13/2018	0.00 USD	View
Normal	2483800	2018-12-03 brownb 01		12/3/2018	749.75 USD	View

5. From here, you can filter by the following: **Cart Name, Cart Number, Date Created, Cart Type, or Cart Status.**
6. Click on **Cart Status** combo box.

The screenshot shows the 'Cart Status' dropdown menu open, with 'Not Returned' selected. The table below shows the same 6 results as the previous screenshot, with the 'Normal - Returned' row highlighted.

Type	Cart Number	Shopping Cart Name	Cart Description	Date Created	Total	Action
Normal	2282287	2018-06-04 brownb 01		6/4/2018	4,250.67 USD	View
Normal	2318293	2018-07-06 brownb 01		7/6/2018	49,786.80 USD	View
Normal - Returned	2318320	2018-07-06 brownb 02		7/6/2018	1,521.00 USD	View
Normal	2318467	2018-07-06 brownb 03		7/6/2018	42.30 USD	View
Normal	2365507	2018-08-13 brownb 05		8/13/2018	0.00 USD	View
Normal	2483800	2018-12-03 brownb 01		12/3/2018	749.75 USD	View

7. Note that one cart has been **Returned** within the Draft Carts tab before applying filter.
8. Select **Not Returned** and click on **Filter** button.

SHOPPING CART MANAGEMENT PAGE

Last Updated on: 4/02/2020

10.

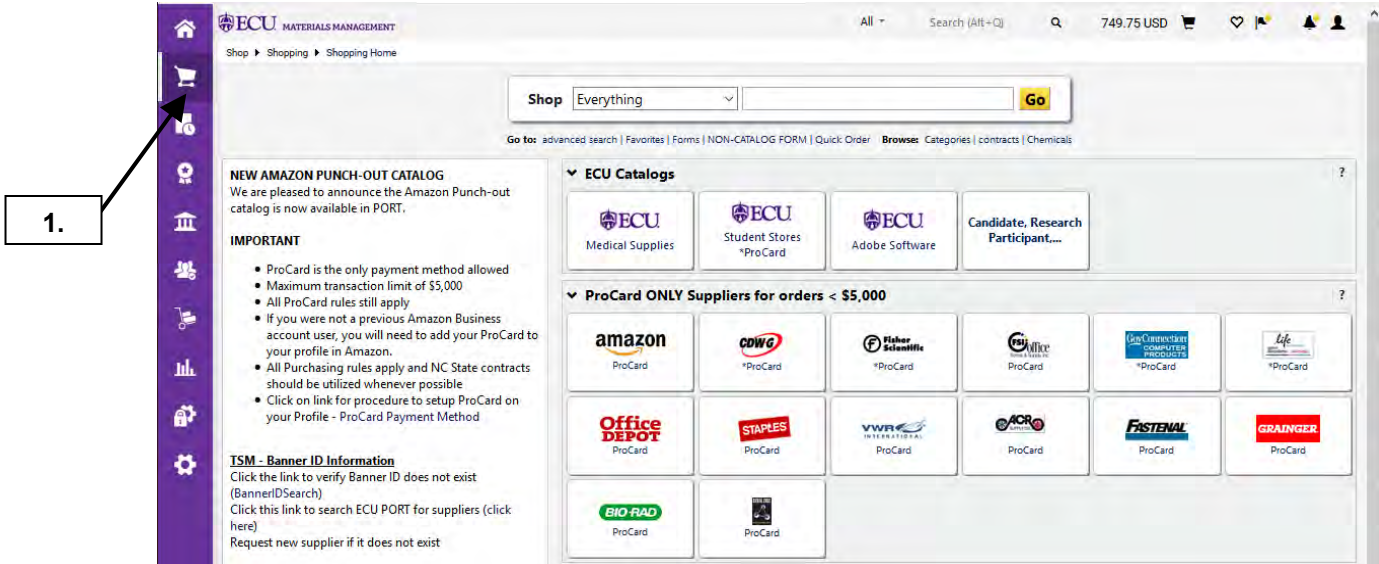
9.

Type	Cart Number	Shopping Cart Name	Cart Description	Date Created	Total	Action
Normal	2282287	2018-06-04 brownb 01		6/4/2018	4,250.67 USD	View
Normal	2318293	2018-07-06 brownb 01		7/6/2018	49,786.80 USD	View
Normal	2318467	2018-07-06 brownb 03		7/6/2018	42.30 USD	View
Normal	2365507	2018-08-13 brownb 05		8/13/2018	0.00 USD	View
Normal	2483800 Active	2018-12-03 brownb 01		12/3/2018	749.75 USD	View

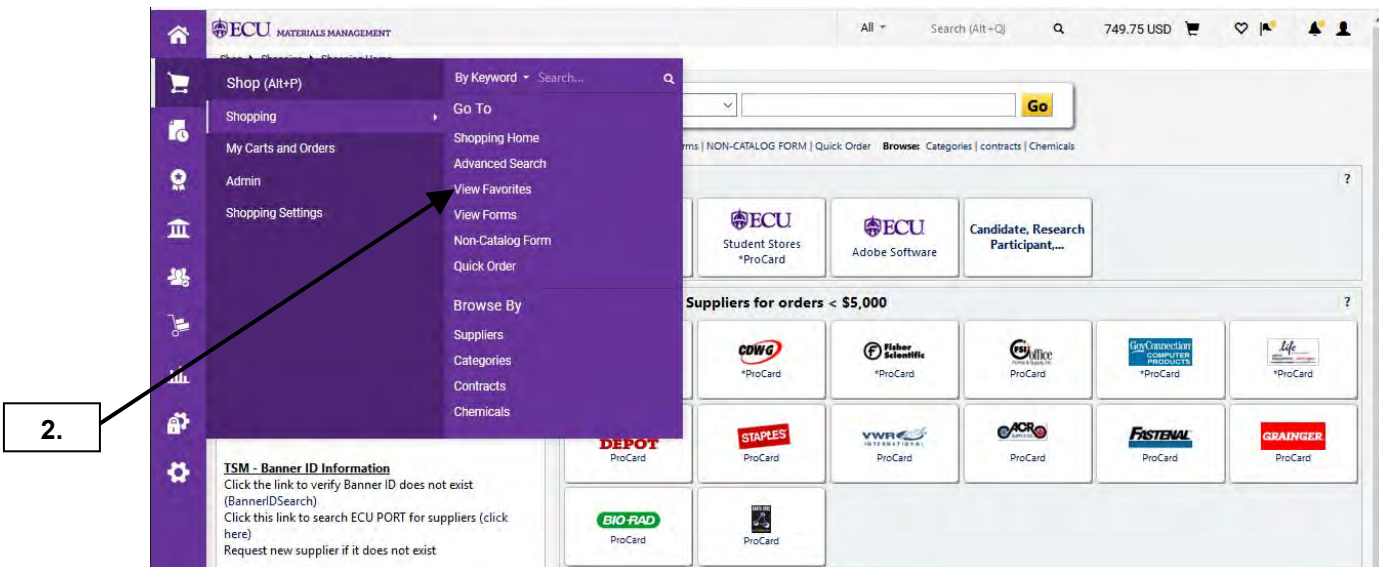
9. Note that **Returned** cart is no longer visible due to **Not Returned** for **Cart Status** filter.
10. This completes the steps for using this procedure. Click on **ECU** icon to return to home page.

CREATE MY FAVORITE FOLDERS

Last Updated on: 4/2/2020



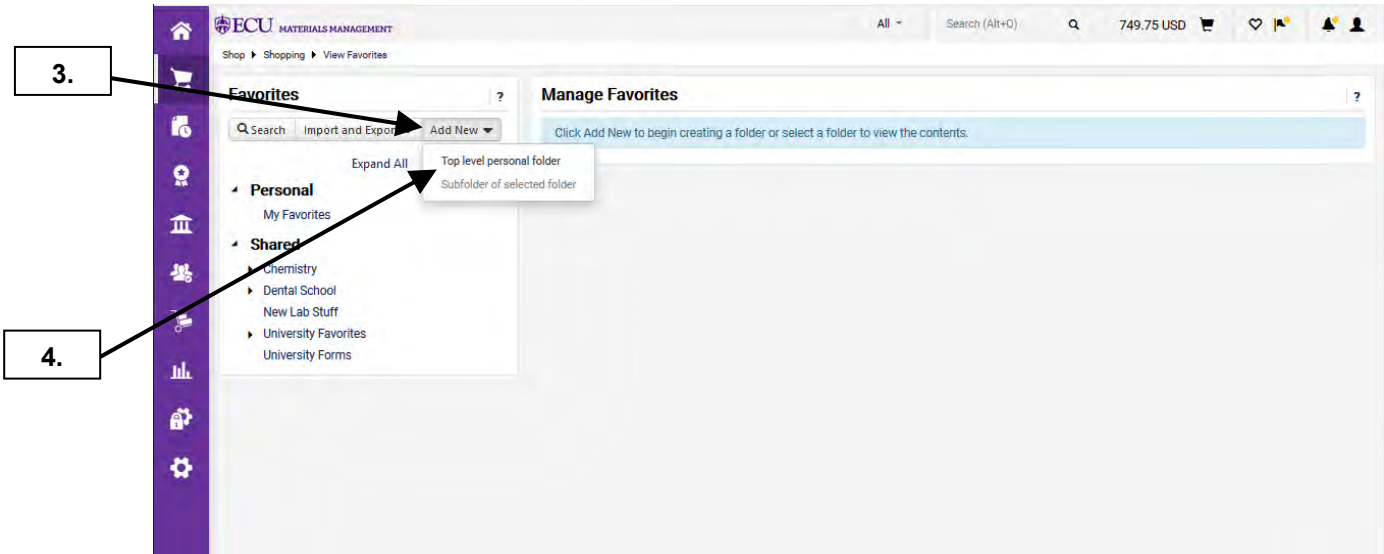
1. Click on **Shopping Cart** icon.



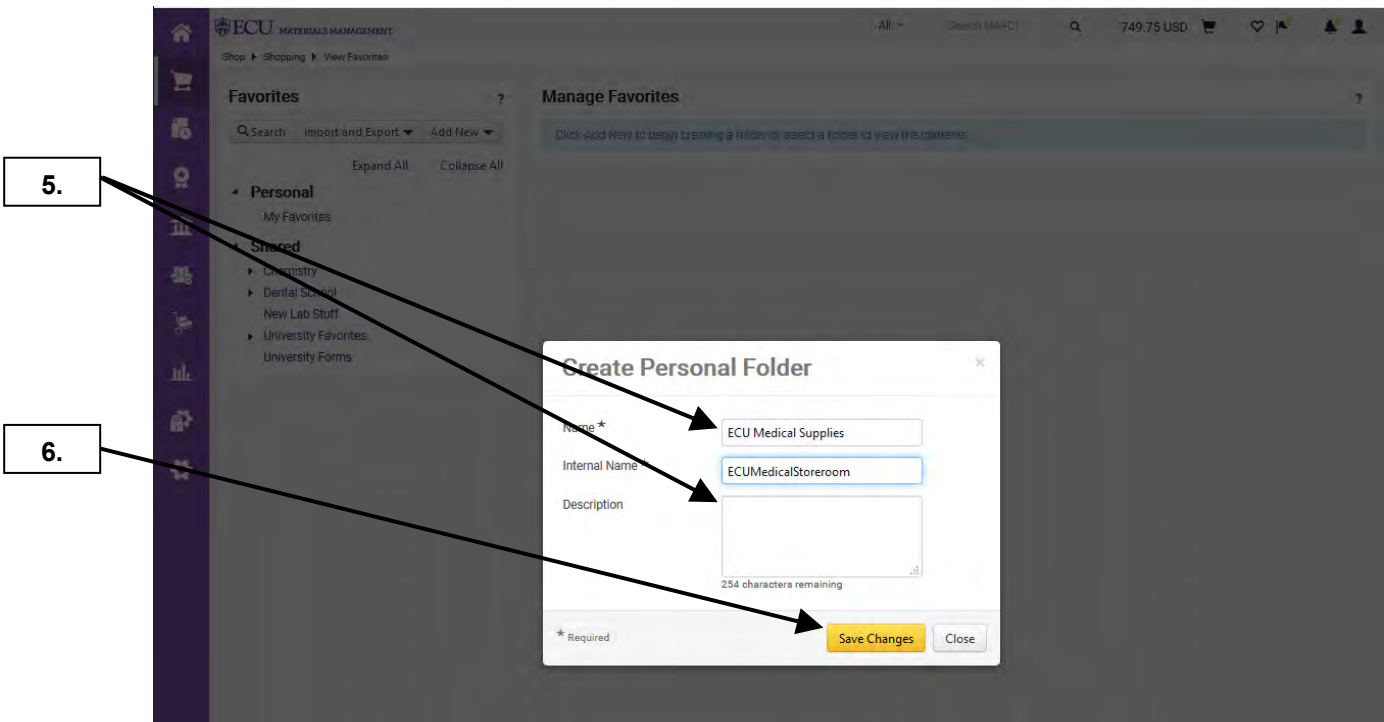
2. Click on **View Favorites** link.

CREATE MY FAVORITE FOLDERS

Last Updated on: 4/2/2020



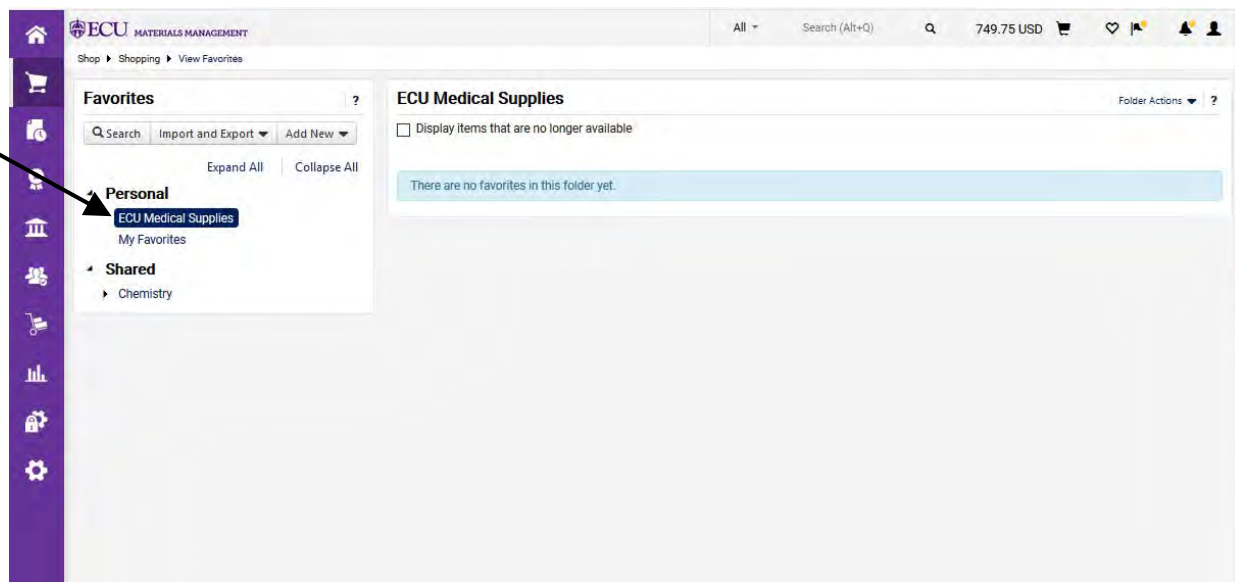
3. Click on **Add New** button.
4. Select **Top level personal folder** to create a folder on the same level as **My Favorites**. **Note:** If you select **Sub folder of selected folder**, the folder will be within **My Favorites**.



5. Type in the folder name. In this example, we will create 3 folders for each of the campus storerooms. The 1st folder will be called **ECU Medical Supplies** for the medical storeroom items. **Note:** The folder **Description** is optional.
6. Click on the **Save Changes** button to create the folder.

CREATE MY FAVORITE FOLDERS

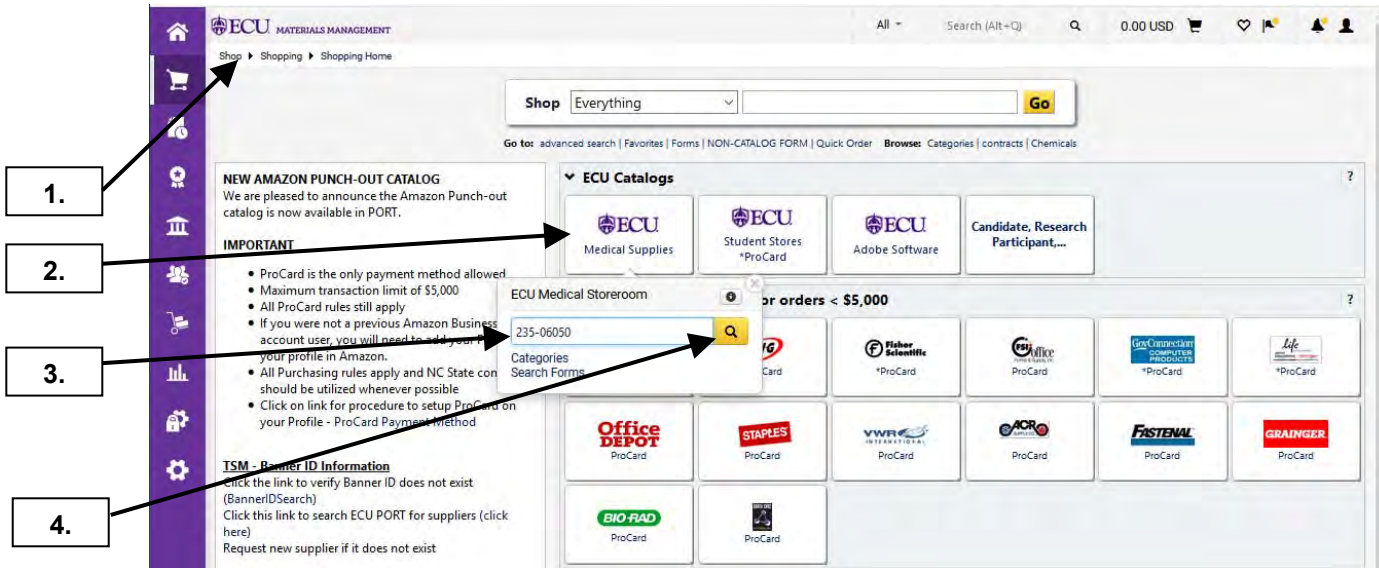
Last Updated on: 4/2/2020



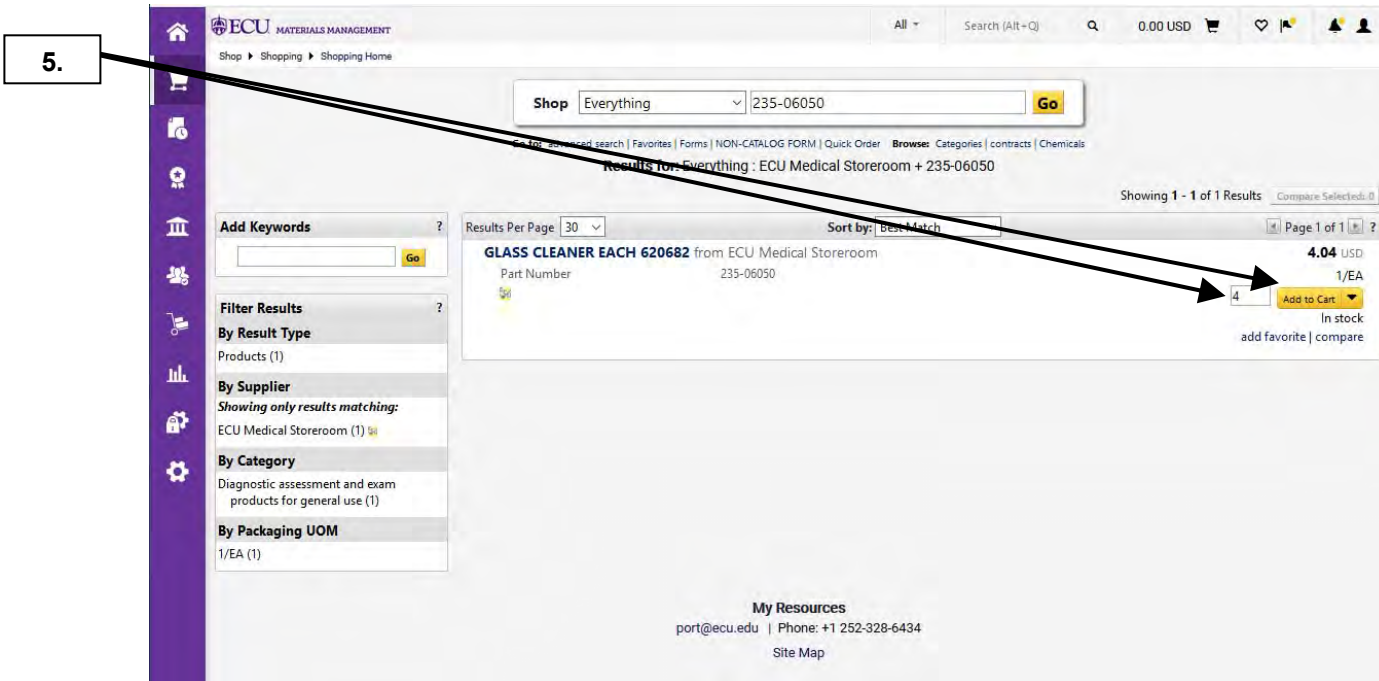
7. Notice that you now have a folder for ECU Medical Supplies storeroom. This completes the steps for creating my favorite folders. See the **Create My Favorite Items** procedure to continue with favorites.

CREATE MY FAVORITE ITEMS

Last Updated on: 4/02/2020



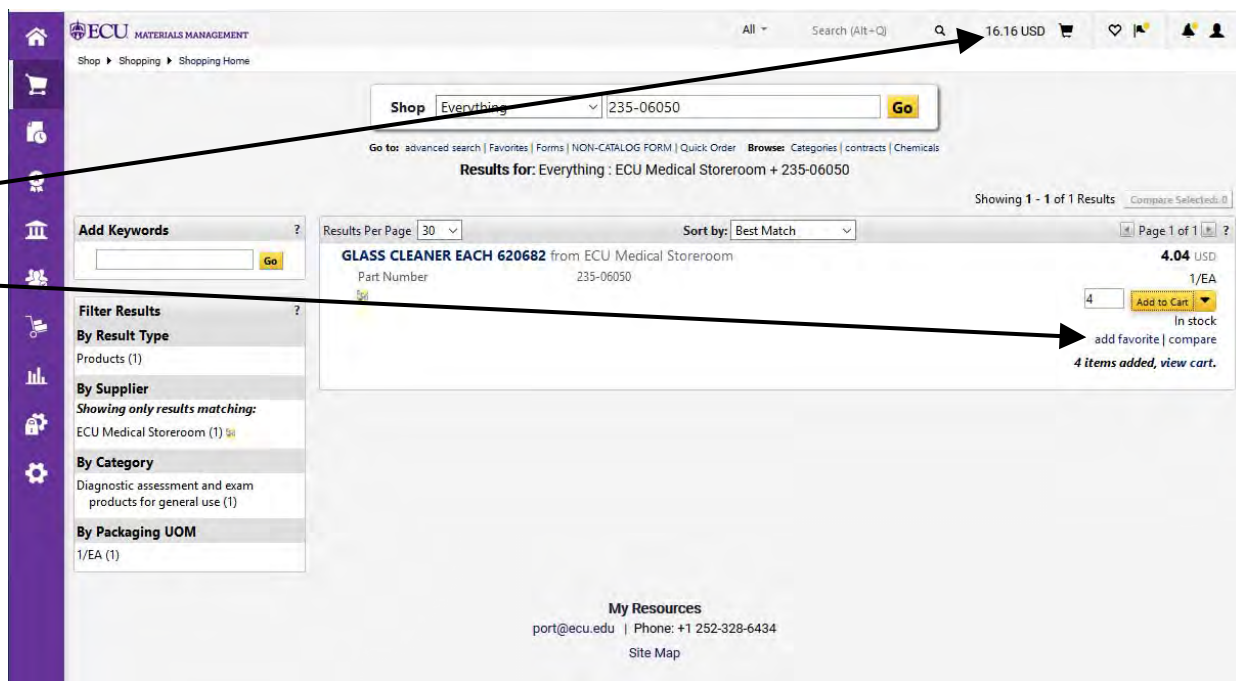
1. Ensure that you are on the **home/shop** page.
2. Click on the East Carolina University Medical Supplies icon.
3. Enter **Catalog #** for one of Medical Storeroom room items. **Note:** This procedure will demonstrate the methods for adding items to your **Favorites** from hosted catalog searches and from your shopping cart.
4. Click on the **Search** button.



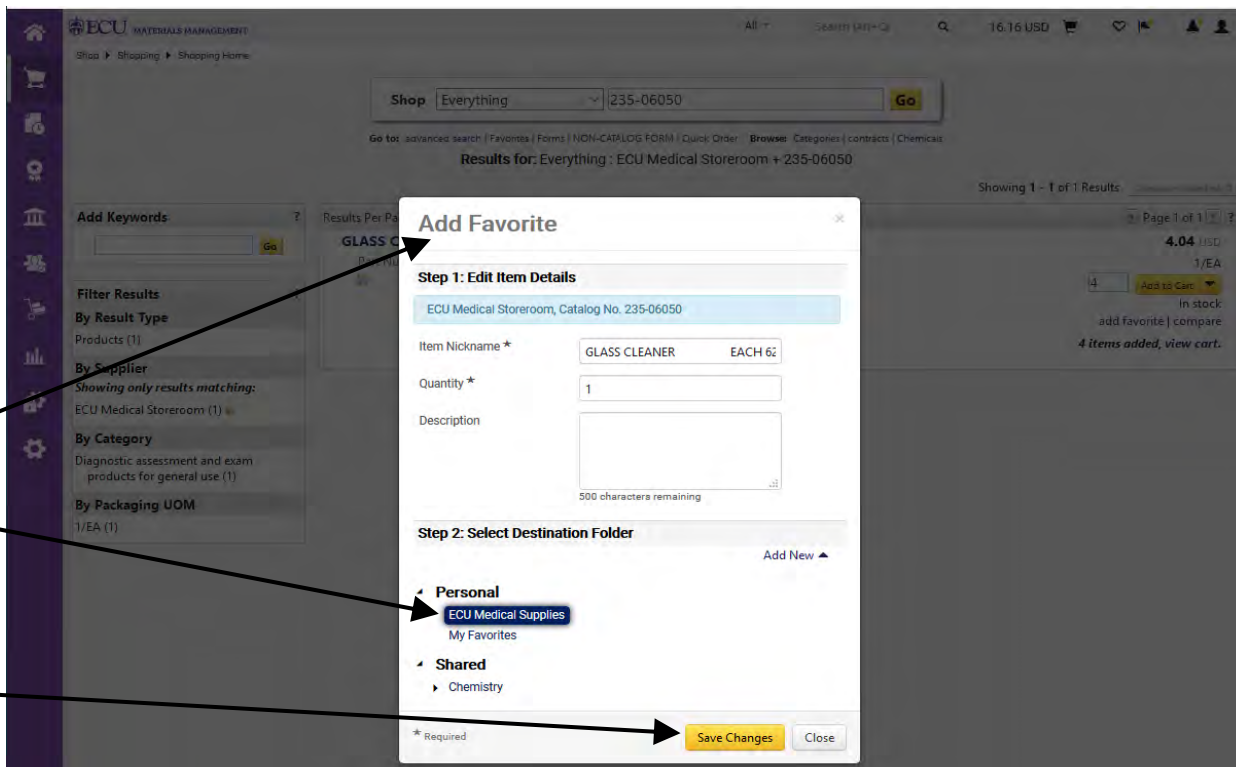
5. Enter quantity needed and click on **Add to Cart** button.

CREATE MY FAVORITE ITEMS

Last Updated on: 4/02/2020



6. Notice that your shopping cart has been updated with the items that were just added.
7. Click on **add favorite** link.



8. The **Add to Favorites** pop-window is displayed.
9. Select the **ECU Medical Supplies** folder that you created in the Create Favorite Folder procedure. This will help you organize your favorite items to ensure that you do not combine items from the different storerooms.
10. Click on the **Save Changes** button. **Note:** This completes the 1st method of adding an item to favorites from hosted catalog searches.

CREATE MY FAVORITE ITEMS

Last Updated on: 4/02/2020

The screenshot shows the ECU Materials Management website interface. At the top, there is a search bar with the text 'Shop Everything' and a search input field containing '140-24790'. A yellow 'Go' button is to the right of the search input. Below the search bar, the results are displayed for 'GLASS CLEANER EACH 620682' from ECU Medical Storeroom. The price is listed as 4.04 USD. On the left side, there is a 'Filter Results' sidebar with various filters like 'By Result Type', 'By Supplier', 'By Category', and 'By Packaging UOM'. Callout 11 points to the search input field, and callout 12 points to the 'Go' button.

11. Enter **Catalog #** for 2nd Medical Storeroom room item.

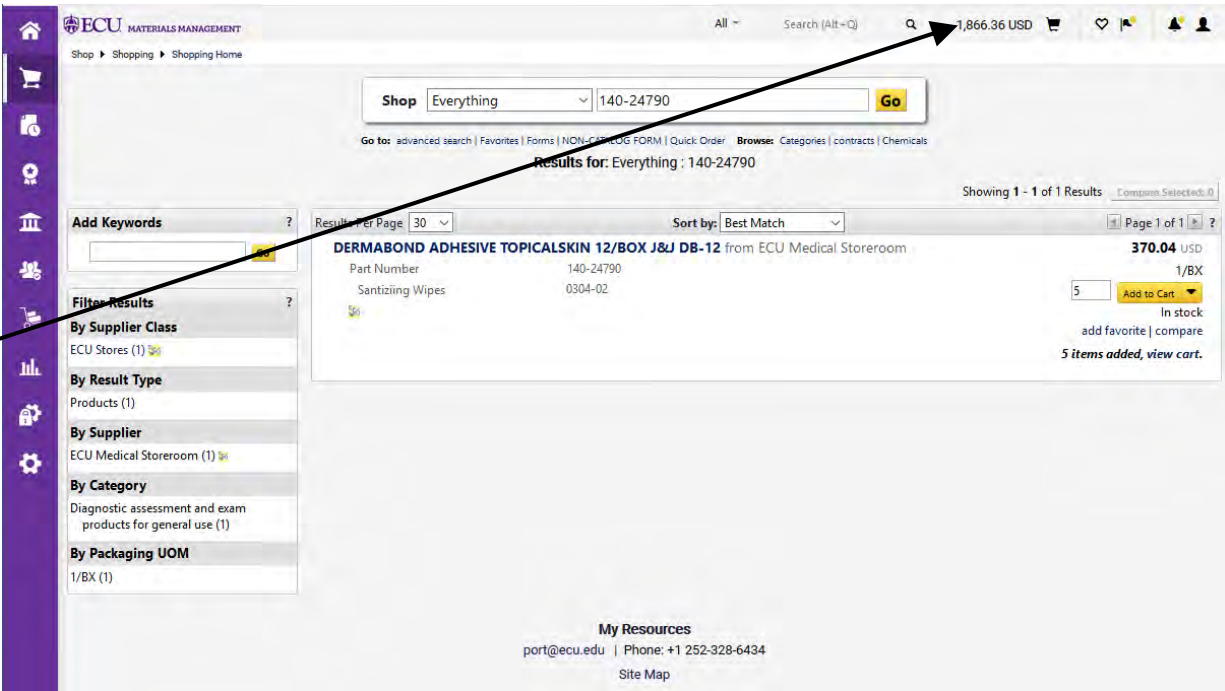
12. Click on the **Go** button.

The screenshot shows the ECU Materials Management website interface. The search bar now shows 'DERMABOND ADHESIVE TOPICALSKIN 12/BOX J&J DB-12' from ECU Medical Storeroom. The price is listed as 370.04 USD. The quantity '5' is entered in the input field next to the 'Add to Cart' button. Callout 13 points to the 'Add to Cart' button.

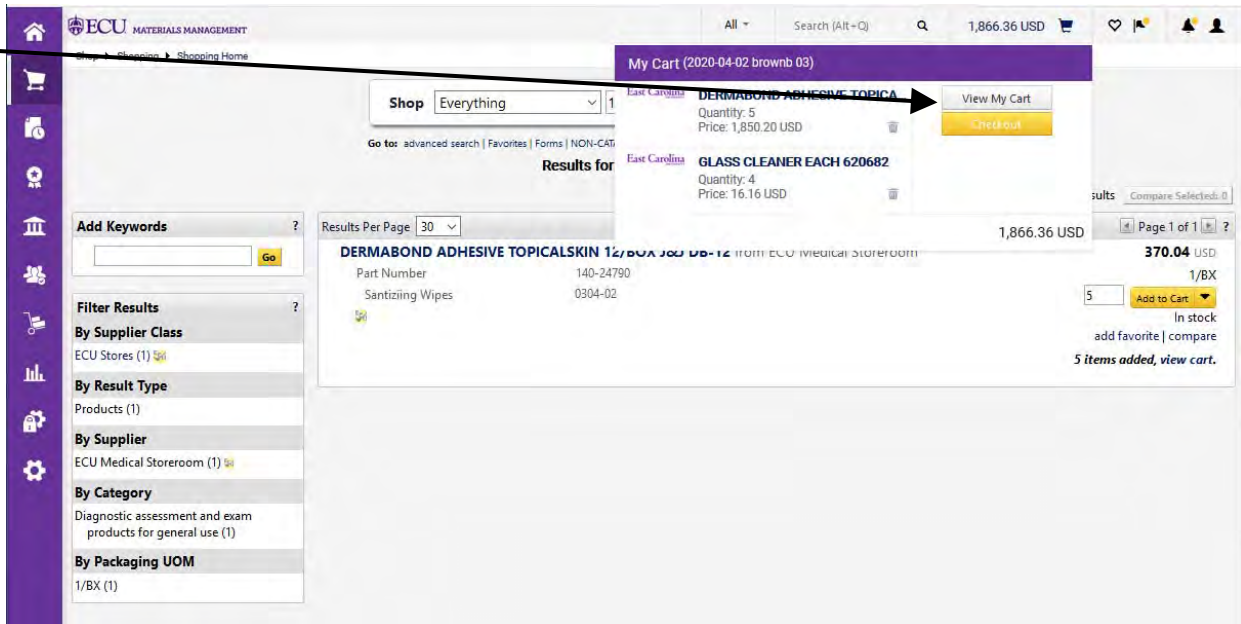
13. Enter quantity needed and click on **Add to Cart** button.

CREATE MY FAVORITE ITEMS

Last Updated on: 4/02/2020



14. Notice that your shopping cart has been updated with the items that were just added.



15. Click on **View My Cart**.

CREATE MY FAVORITE ITEMS

Last Updated on: 4/02/2020

17. Add to Favorites is the default For selected line items drop down box. Click on Go button to add selected item (s) to your favorites.

16. Click on the check box to select the 2nd item.

16. Click on the check box to select the 2nd item.

17. Add to Favorites is the default For selected line items drop down box. Click on Go button to add selected item (s) to your favorites.

18. The Add to Favorites pop-window is displayed.

19. Select the ECU Medical Supplies folder that you created in the Create Favorite Folder procedure.

20. Click on the Save Changes button. Note: This completes the 2nd method of adding an item to favorites from your shopping cart.

18. The Add to Favorites pop-window is displayed.

19. Select the ECU Medical Supplies folder that you created in the Create Favorite Folder procedure.

20. Click on the Save Changes button. Note: This completes the 2nd method of adding an item to favorites from your shopping cart.

CREATE MY FAVORITE ITEMS

Last Updated on: 4/02/2020

Shop > My Carts and Orders > Open My Active Shopping Cart > Cart - 2938360 - Draft Requisition

Almost ready to go! The list below needs to be addressed before the cart can be submitted.

- Required field: State Exempt

9 Item(s) for a total of **1,866.36** USD

Proceed to Checkout

Save

Priority: Normal
 Prepared by: Bridget Brown
 Prepared for: Bridget Brown
 Cart Name: 2020-04-02 brownb 03

Business Purpose / Note to Approvers: State Exempt

Backup Required:
 Special Instructions: None

Notes to Suppliers: add note...

Supplier / Line Item Details

ECU Medical Storeroom
 Medical Supplies
 600 Moye Blvd, Brody Som Gw-56, Greenville, NC 27834 US

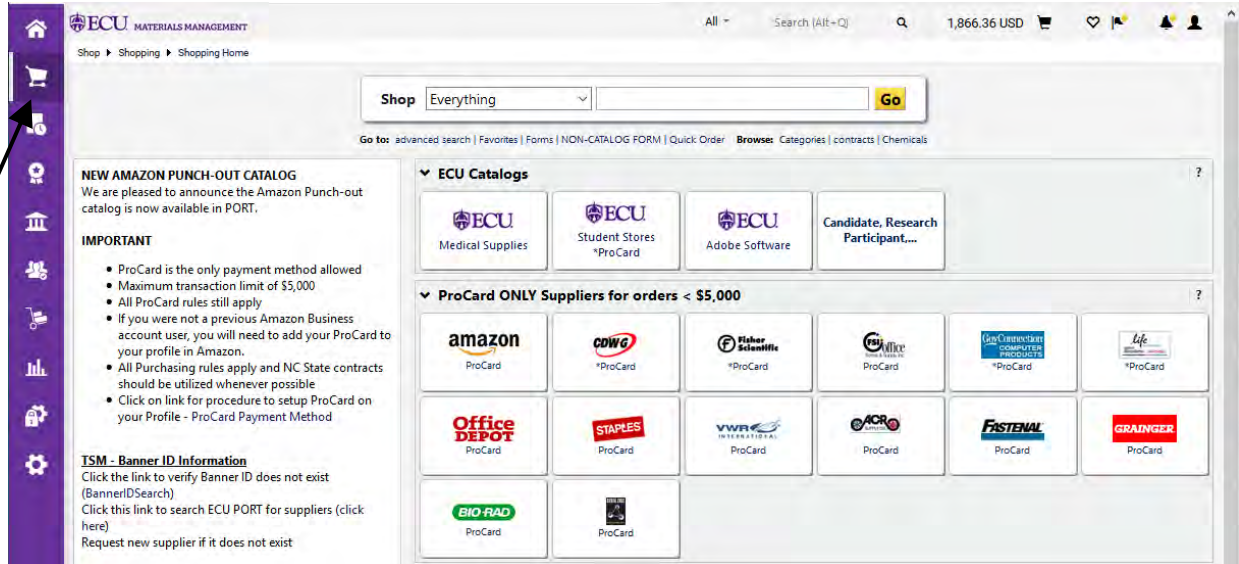
Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 GLASS CLEANER EACH 620682	235-06090	1/EA	4.04	4 EA	16.16 USD
2 DERMABOND ADHESIVE TOPICALSKIN 12/BOX J&J DB-12	140-24790	1/BX	370.04	5 BX	1,850.20 USD
Supplier subtotal					1,866.36 USD
Subtotal					1,866.36
Shipping					0.00
Handling					0.00
Total					1,866.36 USD

Save **Proceed to Checkout**

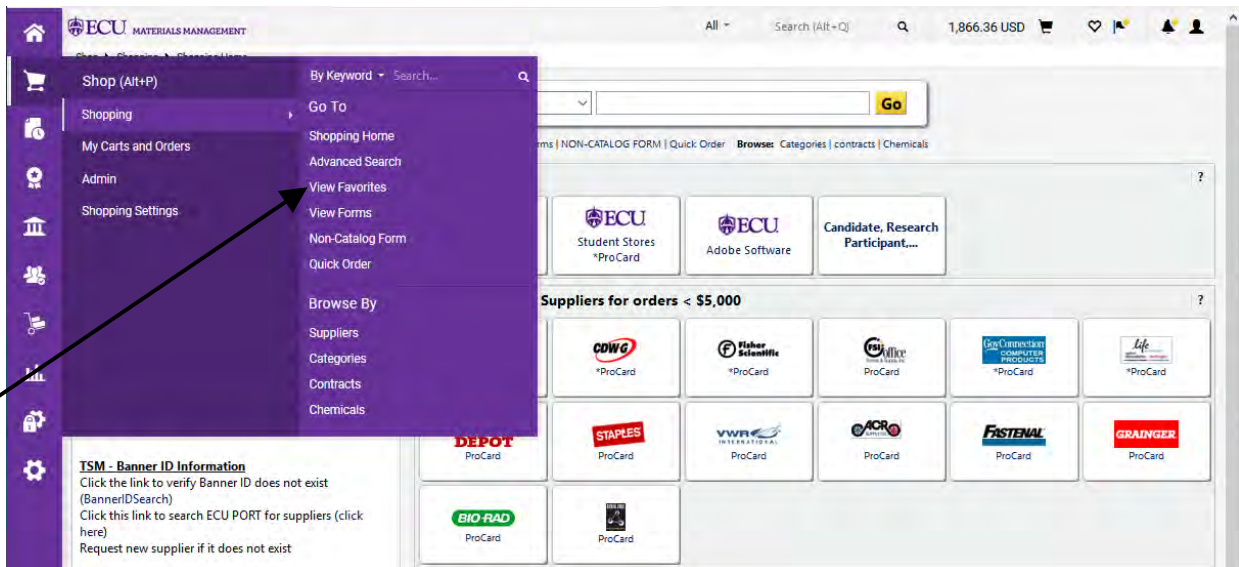
21. This completes the steps for adding items to favorites. **Note:** To learn how to use favorite items, see the **Use Favorite Item** procedures. See the **Edit Cart Header** procedure to continue the review process.

USE MY FAVORITE ITEMS

Last Updated on: 4/02/2020



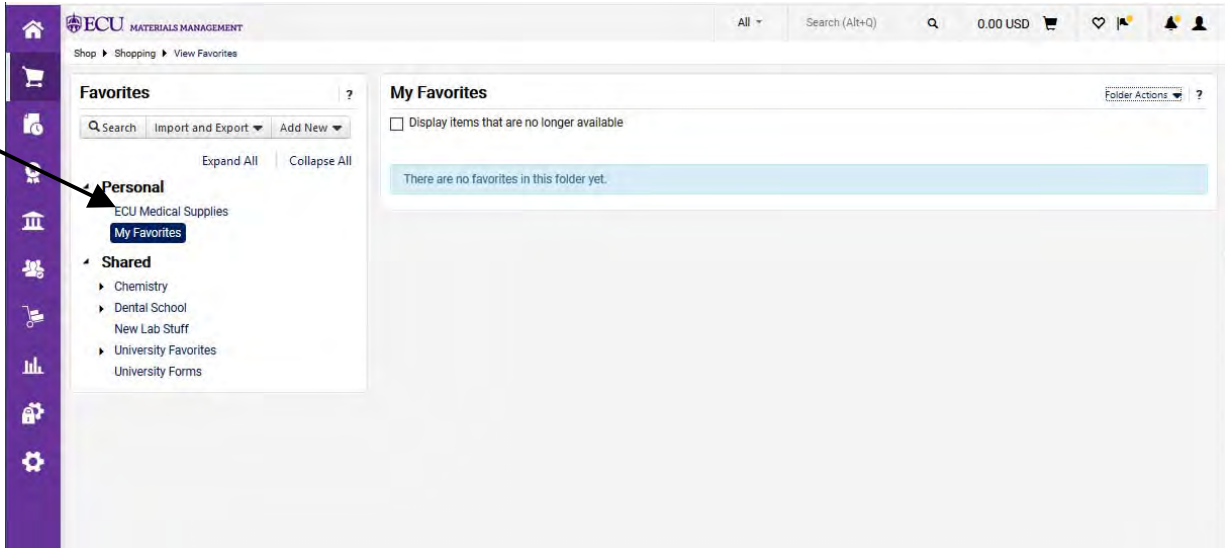
1. Click on **Shopping Cart** icon.



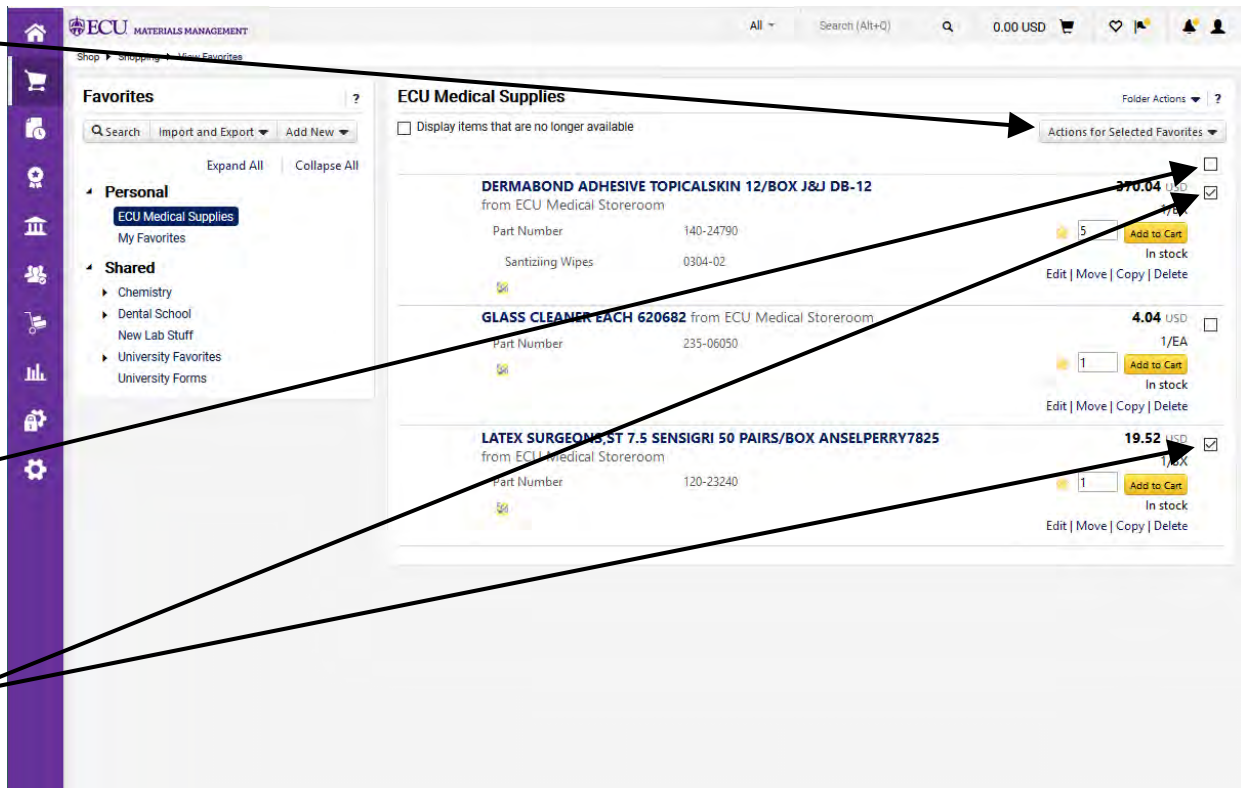
2. Click on **View Favorites** link.

USE MY FAVORITE ITEMS

Last Updated on: 4/02/2020



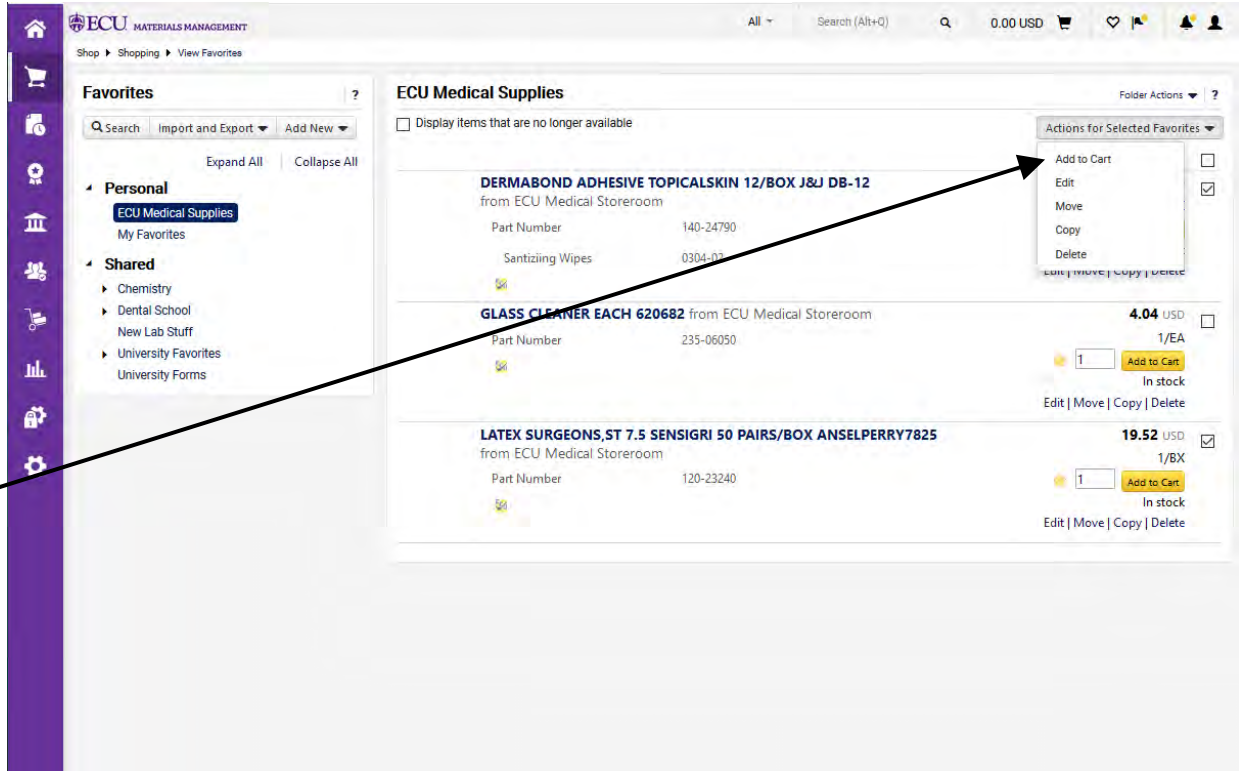
3. Click on **ECU Medical Supplies** folder to add items.



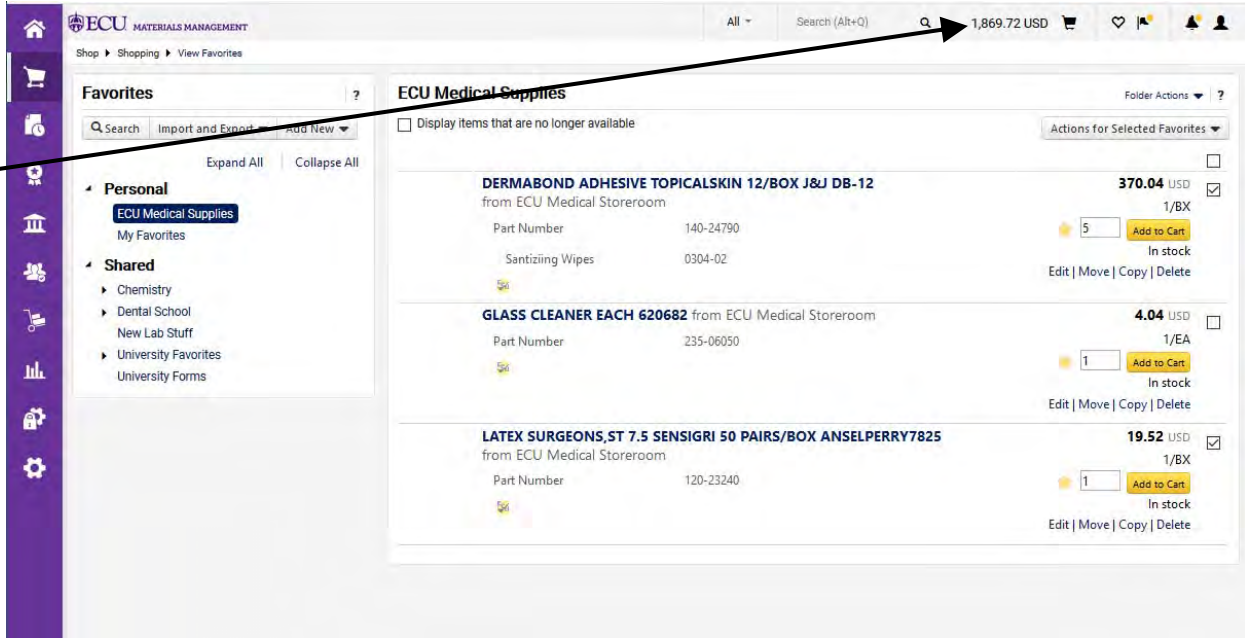
4. Selecting the check box at the top of list will select all items within **ECU Office Supplies** folder.
5. In this example, we will select 2 check boxes that correspond with the desired items. **Note:** You can also adjust quantity needed for each item. **If pricing has changed for one of your favorite ECU storeroom / hosted catalog items, pricing will update once item is added to shopping cart.**
6. Click on **Actions for Selected Favorites** dropdown menu to find options for multiple items. **Note:** Clicking an **Add to Cart** button will only add the item that corresponds with the button.

USE MY FAVORITE ITEMS

Last Updated on: 4/02/2020



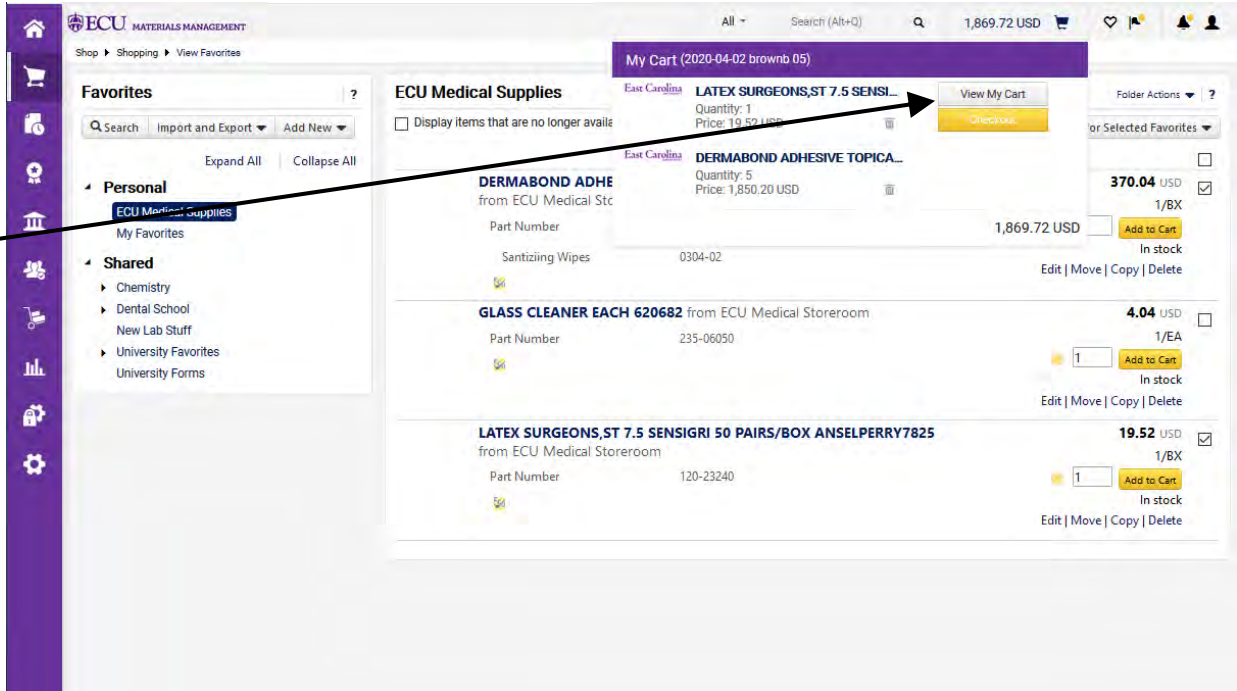
7. From the **Actions for Selected Favorites** dropdown click on Add to Cart.



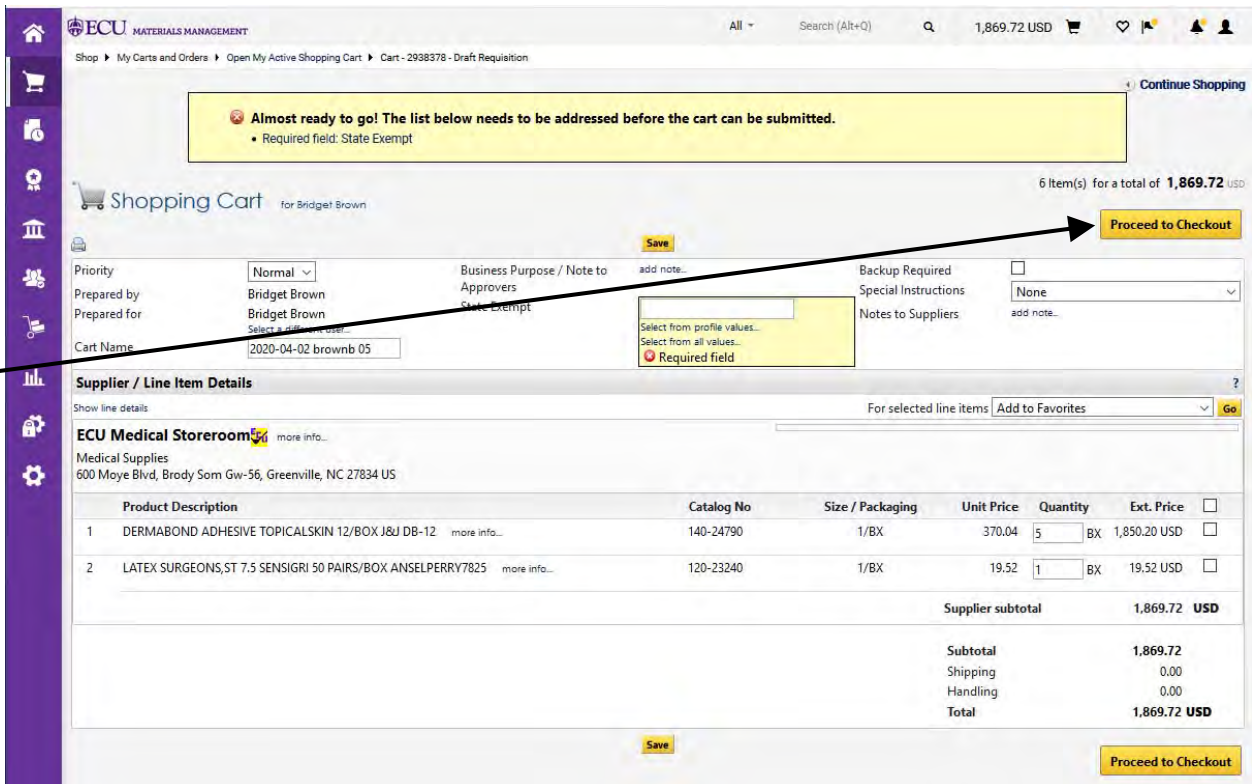
8. Notice the items were added to the shopping cart. Click on **Shopping Cart**.

USE MY FAVORITE ITEMS

Last Updated on: 4/02/2020



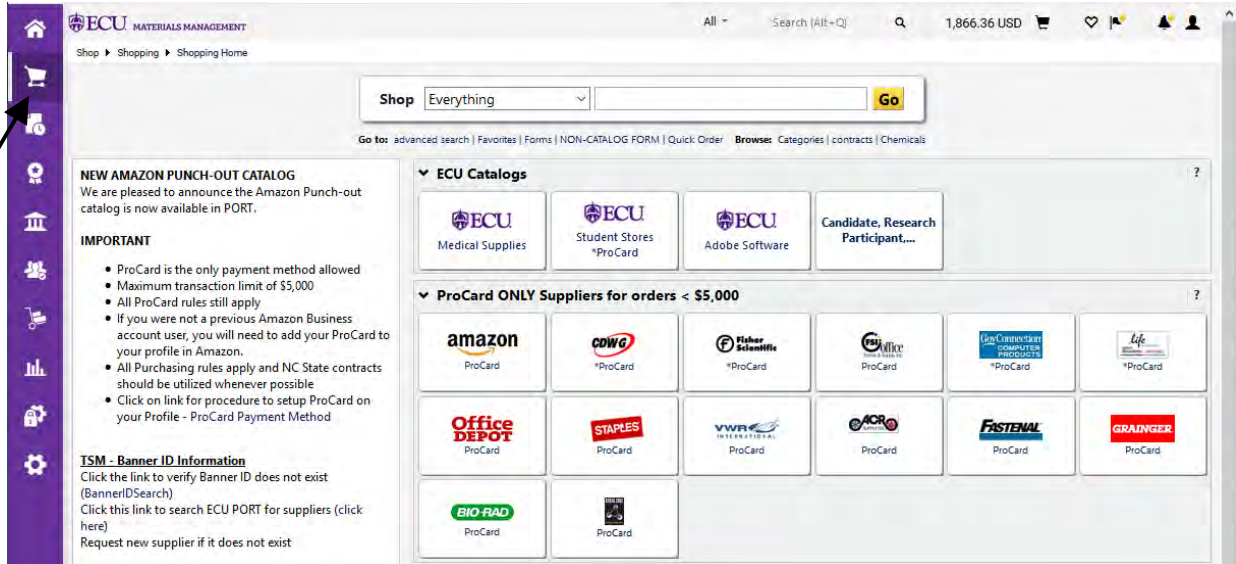
9. Click on **View My Cart**.



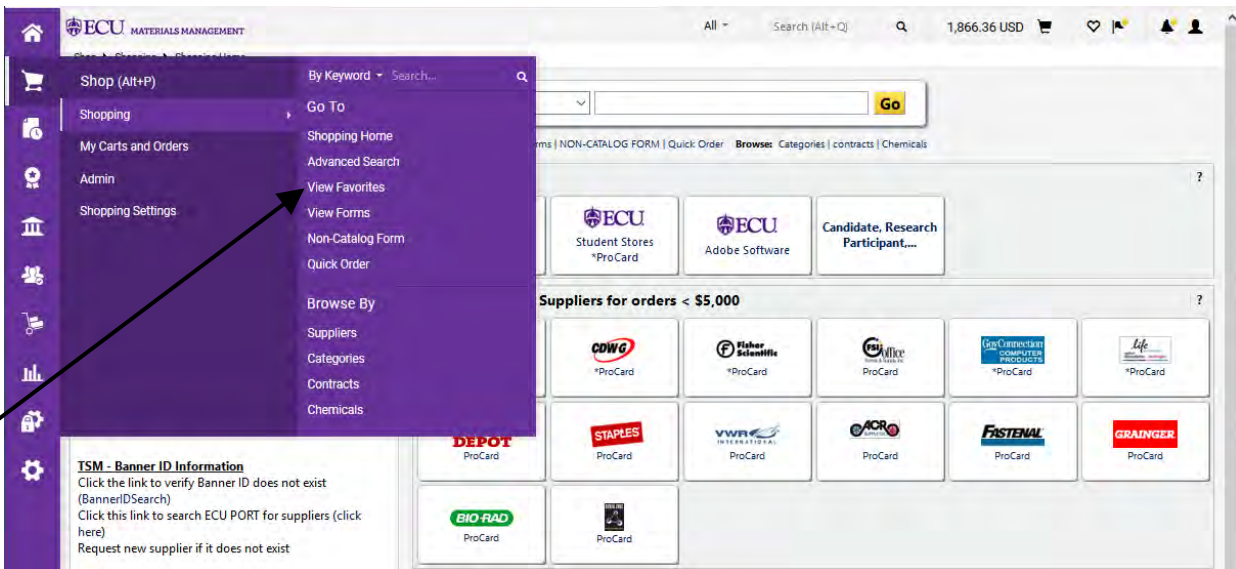
10. This completes the steps for using my favorites and brings you to the **New Shopping Cart** edit section. See the **Edit Cart Header** procedure to continue the review process.

USE UNIVERSITY FAVORITE ITEMS

Last Updated on: 4/02/2020



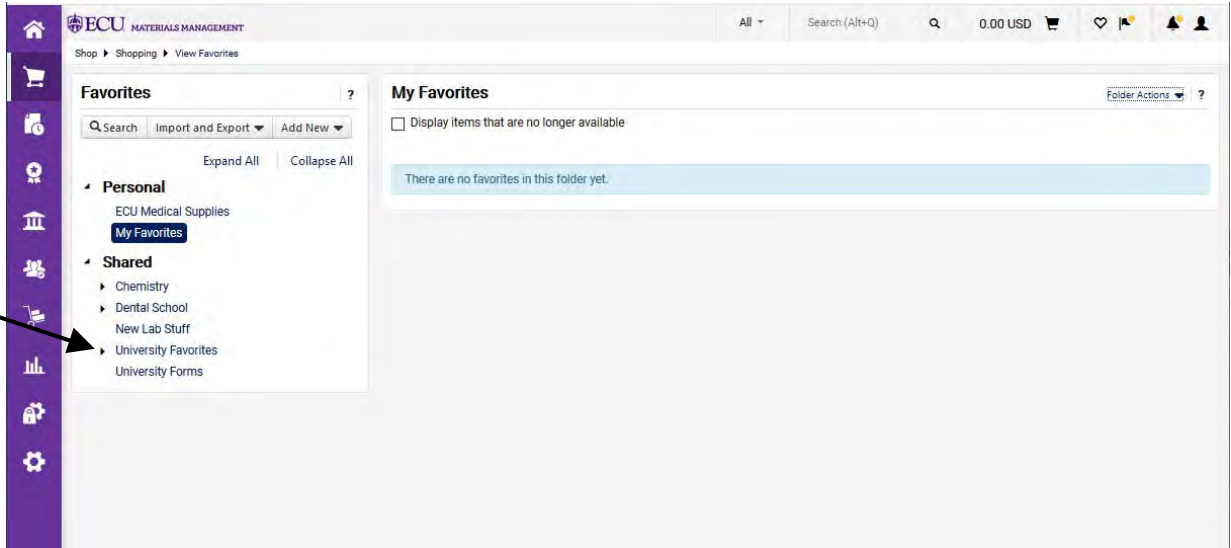
1. Click on **Shopping Cart** icon.



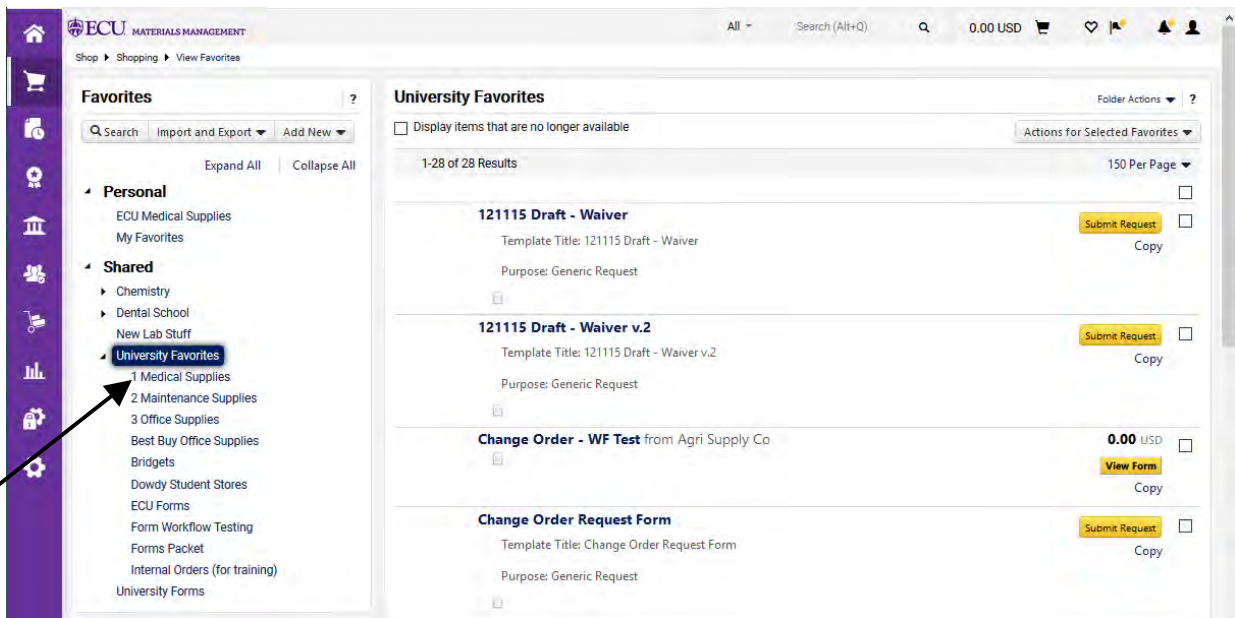
2. Click on **View Favorites**.

USE UNIVERSITY FAVORITE ITEMS

Last Updated on: 4/02/2020



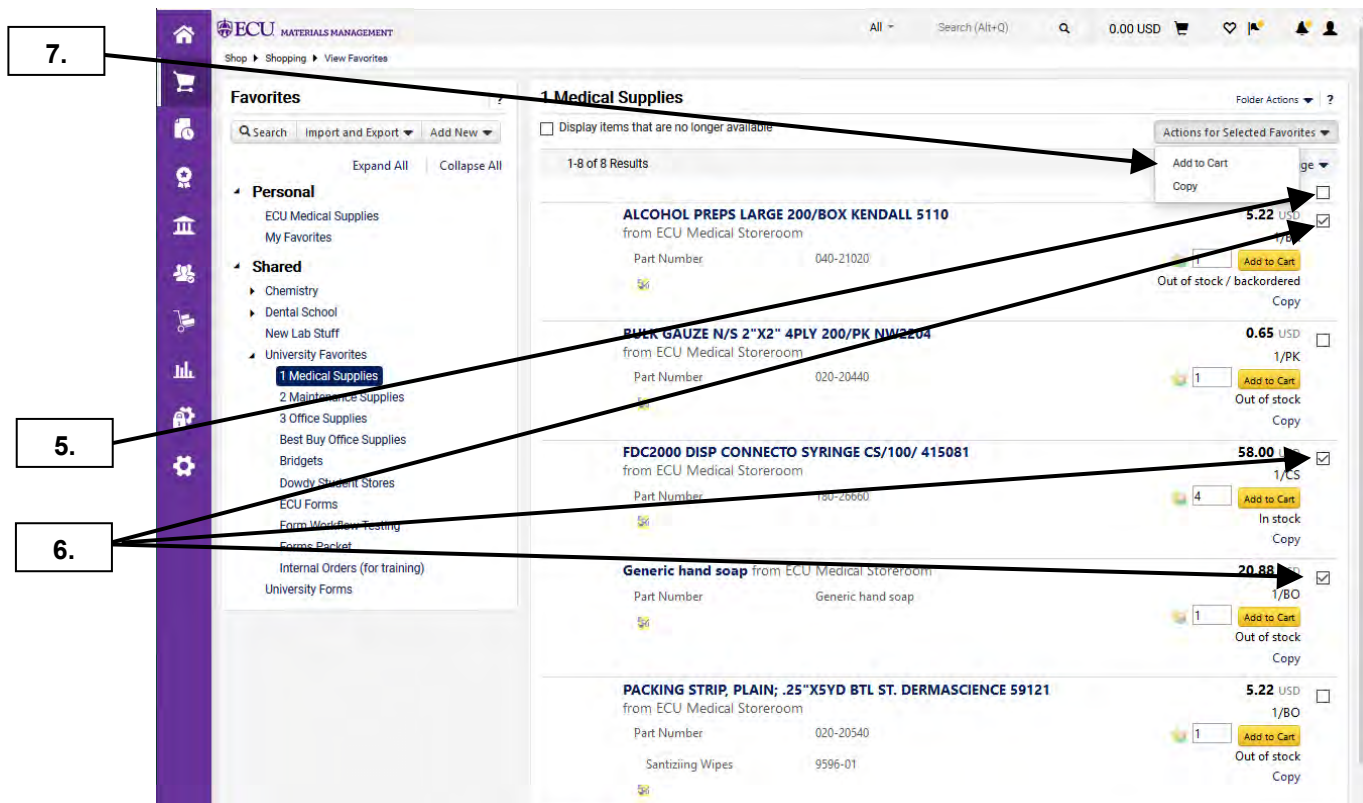
3. Click on expand/collapse icon beside **University Favorites**. In this example, we will use items from **1 Medical Supplies**, under **University Favorites**.



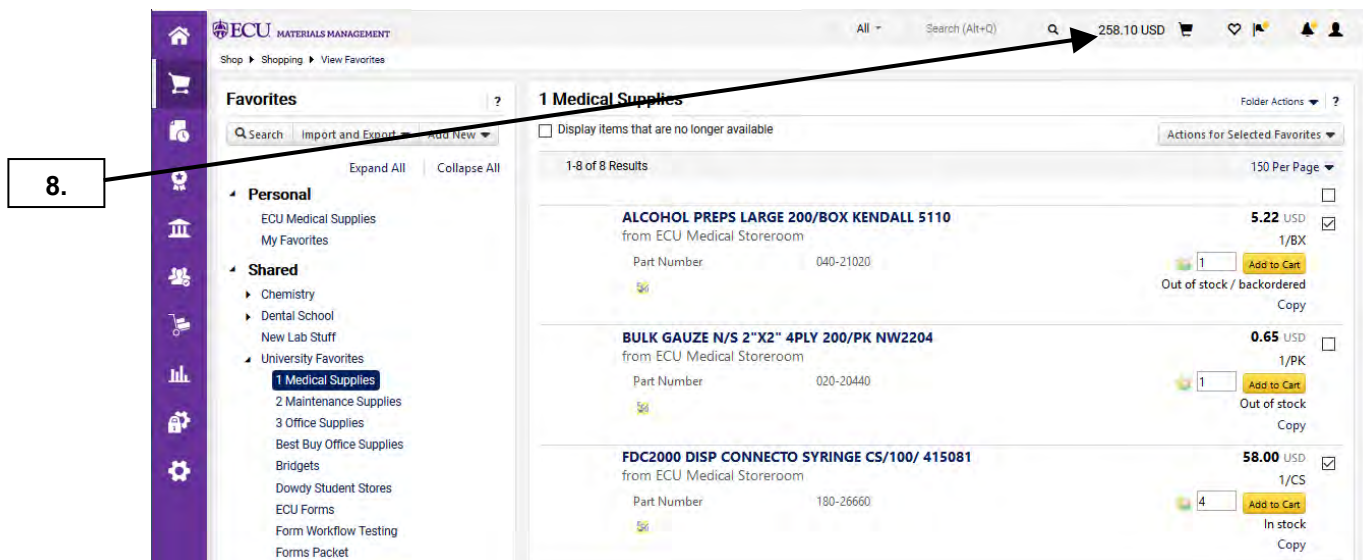
4. Select **1 Medical Supplies** folder.

USE UNIVERSITY FAVORITE ITEMS

Last Updated on: 4/02/2020



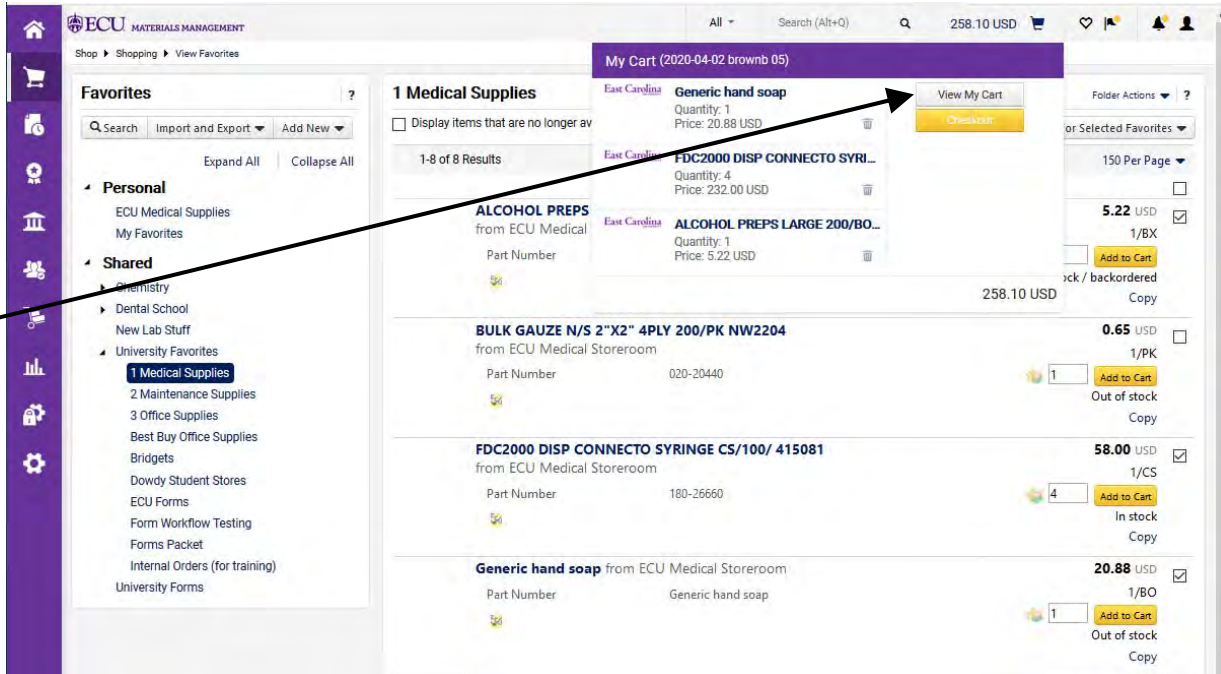
5. Selecting the check box at the top of list will select all items within **1 Medical Supplies** folder.
6. In this example, we will select just the 3 check boxes that correspond with the desired items.
Note: You can also adjust quantity needed for each item. **If pricing has changed for one of your favorite ECU storeroom / hosted catalog items, pricing will update once item is added to shopping cart.**
7. Click the **Actions for Selected Favorites** dropdown and then **Add to Cart** to add multiple items.
Note: Clicking on **Add to Cart** button will only add the item that corresponds with the button.



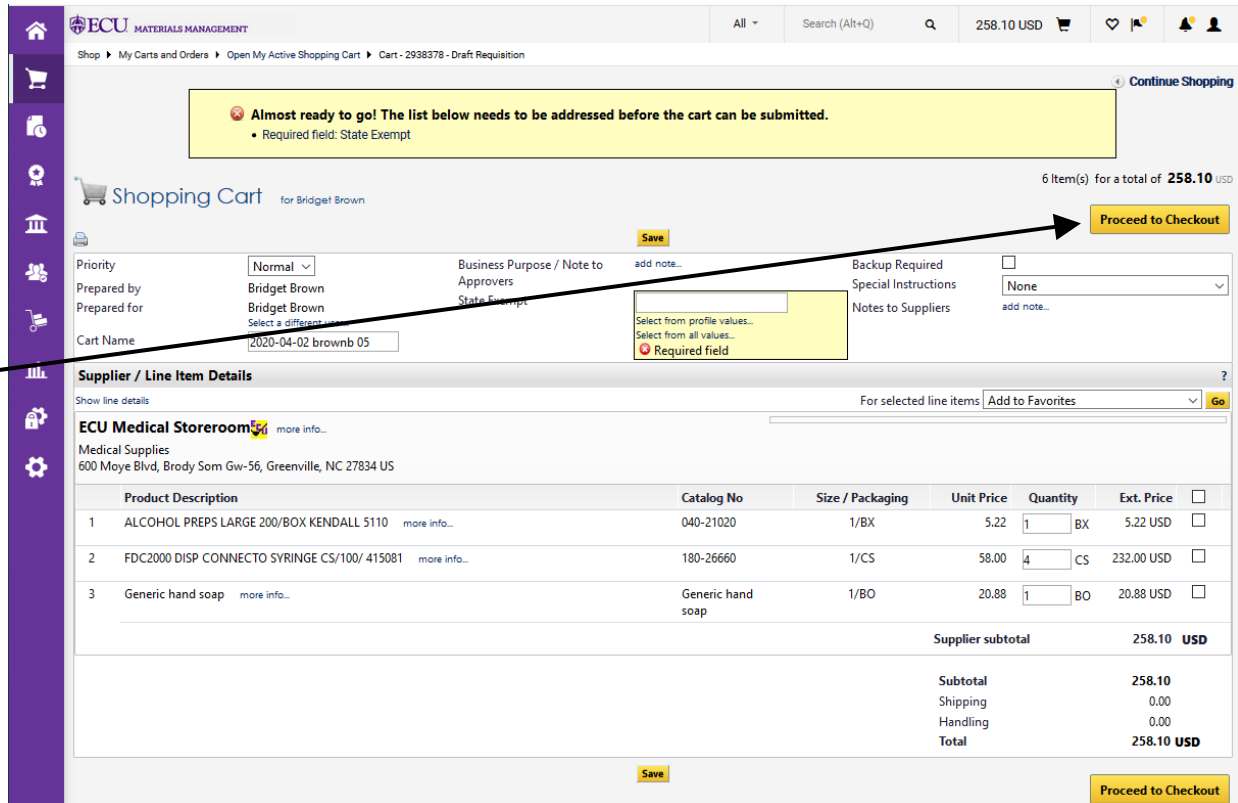
8. Notice the items were added to the shopping cart. Click on the **Shopping Cart**.

USE UNIVERSITY FAVORITE ITEMS

Last Updated on: 4/02/2020



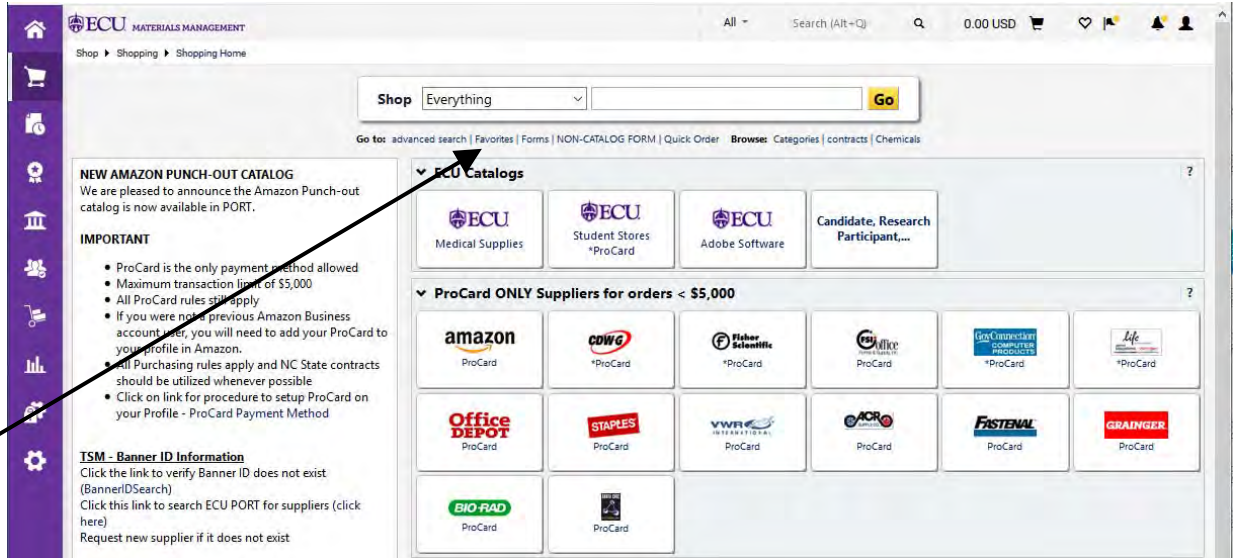
9. Click on **View My Cart**.



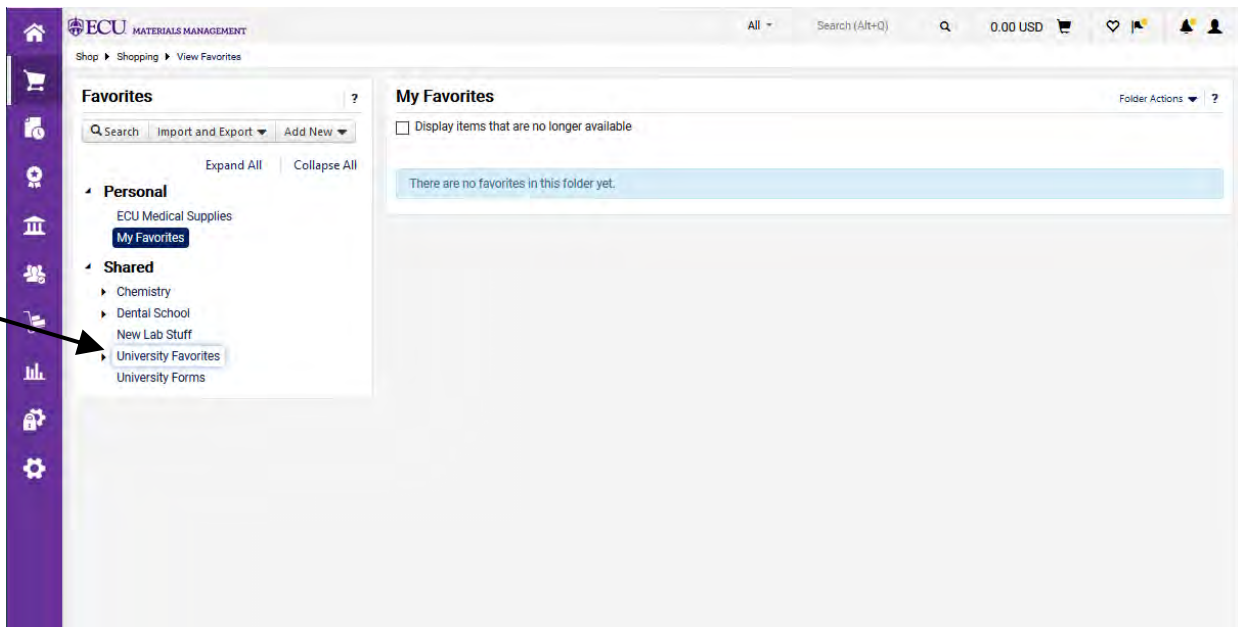
10. This completes the steps for using university favorites and brings you to the **New Shopping Cart** edit section. See the **Edit Cart Header** procedure to continue the review process.

COPY FAVORITE ITEMS

Last Updated on: 4/02/2020



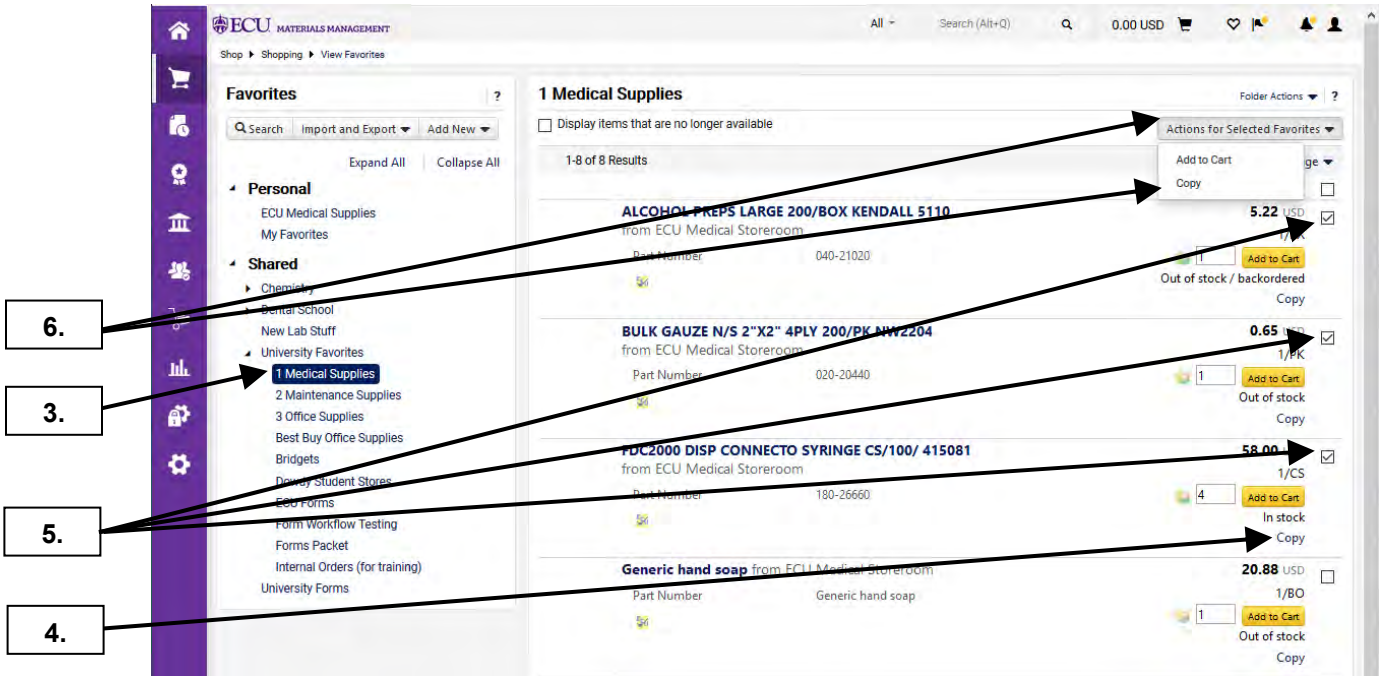
1. Click on **Favorites** link.



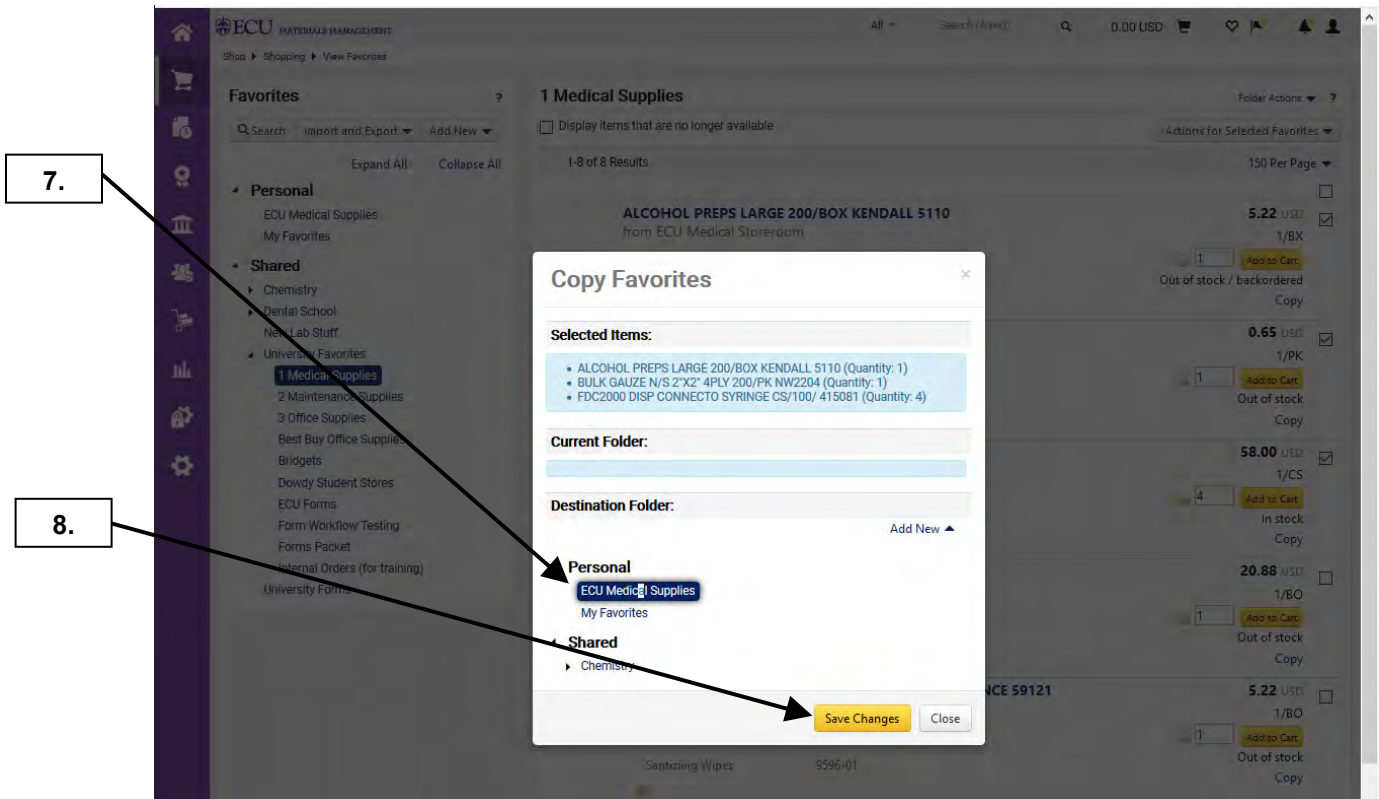
2. Click on **expand/collapse** icon beside **University Favorites**. In this example, we will copy favorites from **1 Medical Supplies** (under **University Favorites**) to **ECU Medical Supplies** (under **Personal**).

COPY FAVORITE ITEMS

Last Updated on: 4/02/2020



3. Select the **2 Maintenance Supplies** folder under University Favorites.
4. To copy only one item, you can select the **Copy** link that corresponds with the item.
5. In this example, we will copy the 1st three items in the **1 Medical Supplies** folder.
6. Click the **Actions for Selected Favorites** dropdown then click **Copy**.



7. Select **ECU Medical Supplies** folder.
8. Click on **Save Changes** button.

COPY FAVORITE ITEMS

Last Updated on: 4/02/2020

The screenshot shows the ECU Materials Management interface. On the left, a purple sidebar contains a navigation menu with icons. The main content area is titled 'ECU Medical Supplies' and displays a list of items. The items are:

- ALCOHOL PREPS LARGE 200/BOX KENDALL 5110** (5.22 USD, 1/BX, Out of stock / backordered)
- BULK GAUZE N/S 2"X2" 4PLY 200/PK NW2204** (0.65 USD, 1/PK, Out of stock)
- DERMABOND ADHESIVE TOPICALSKIN 12/BOX J&J DB-12** (370.04 USD, 1/BX, In stock)
- FDC2000 DISP CONNECTO SYRINGE CS/100/ 415081** (58.00 USD, 1/CS, In stock)
- GLASS CLEANER EACH 620682** (4.04 USD, 1/EA, In stock)
- LATEX SURGEONS, ST 7.5 SENSIGRI 50 PAIRS/BOX ANSELPERRY7825** (19.52 USD, 1/BX, In stock)

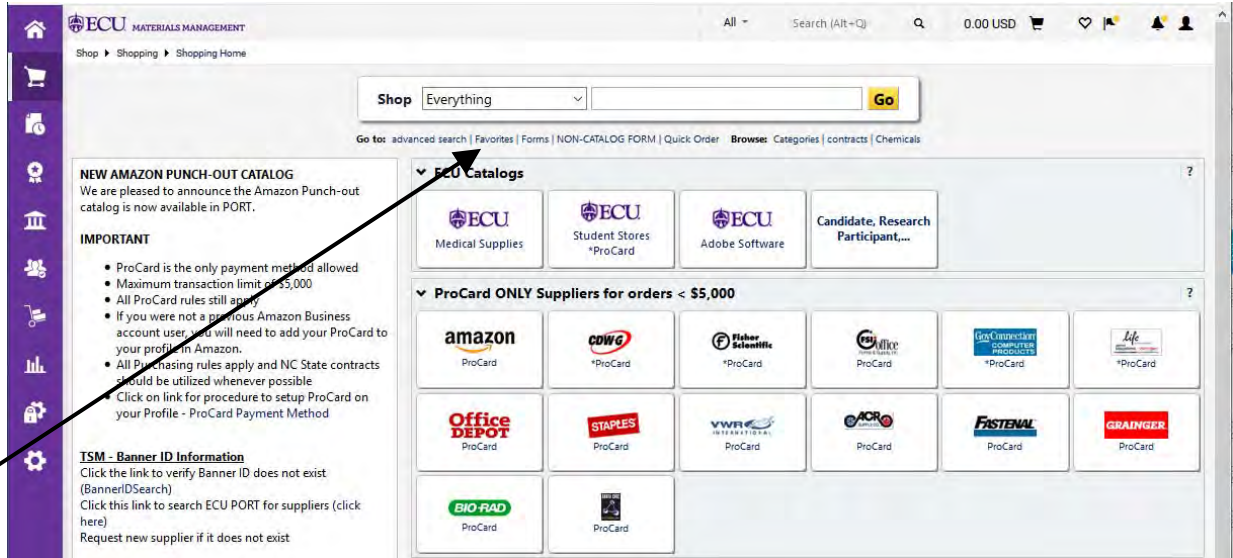
Arrows from numbered boxes indicate the following steps:

- 9.** Points to the 'ECU Medical Supplies' folder in the Favorites list.
- 10.** Points to the list of items in the 'ECU Medical Supplies' folder.
- 11.** Points to the 'ECU' icon in the sidebar navigation menu.

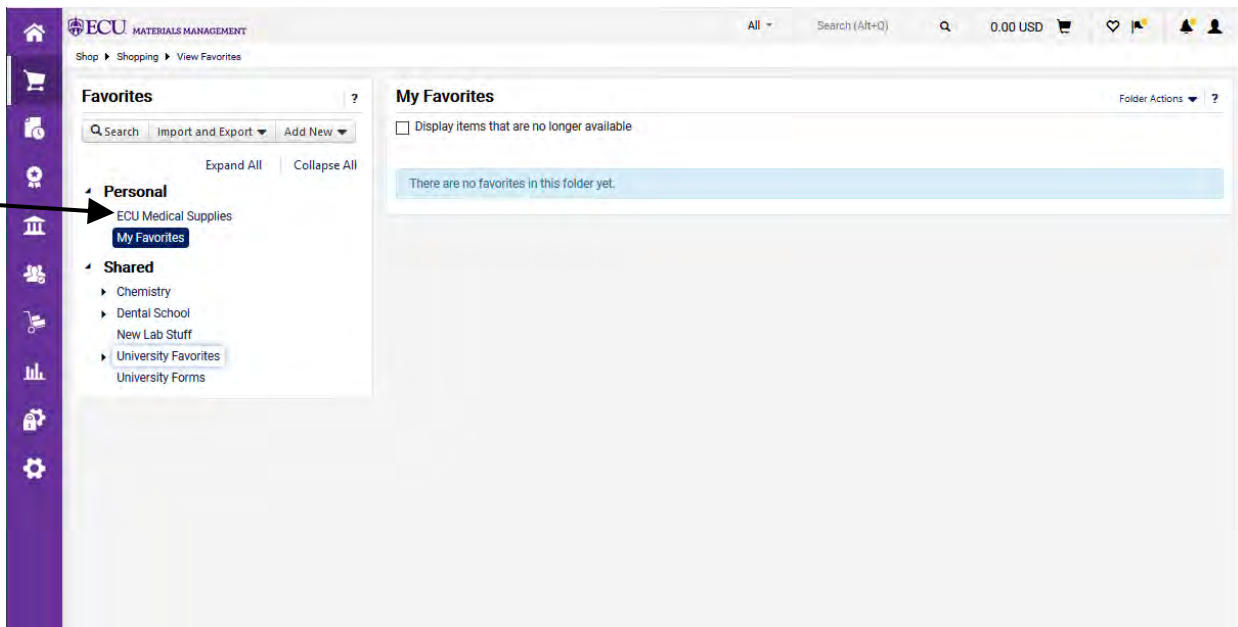
9. Check **ECU Medical Supplies** folder under Personal to confirm the items were moved from **1 Medical Supplies** folder
10. Notice the items were moved to **ECU Maintenance Supplies** folder.
11. This completes the steps for this procedure. Click on the **ECU** icon to return to the home page.

DELETE FAVORITE ITEMS

Last Updated on: 4/02/2020



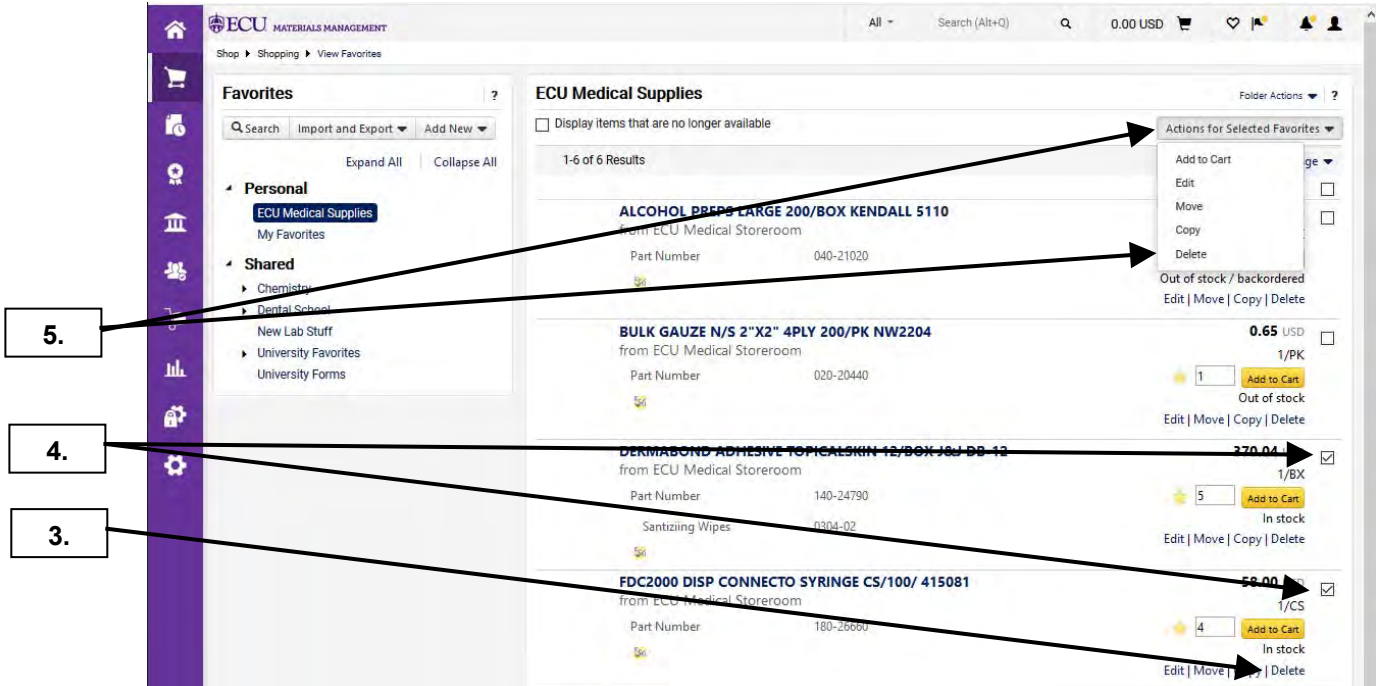
1. Click on **Favorites** link.



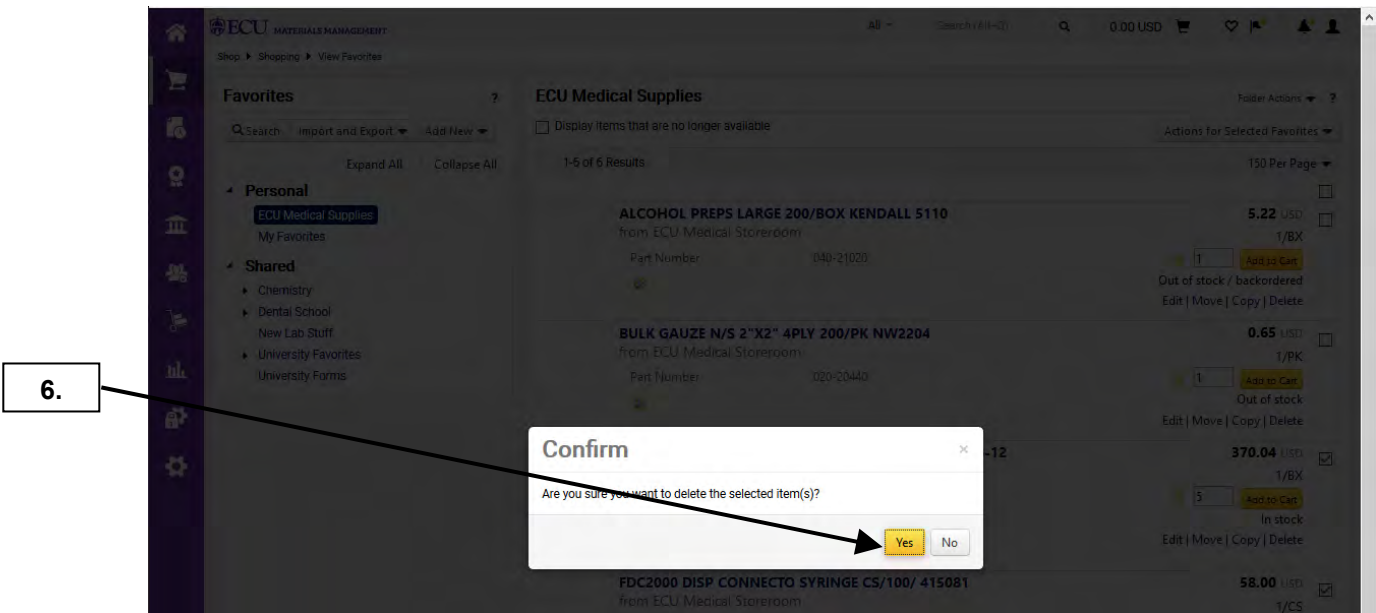
2. Click on the folder under **Personal** that contains the item (s) to delete from your favorites. In this example, we will be deleting items from the **ECU Medical Supplies** folder.

DELETE FAVORITE ITEMS

Last Updated on: 4/02/2020



3. To delete only one item, you can select the **delete** link that corresponds with the item.
4. In this example, we will delete multiple items by selecting the check box that corresponds with the items that need to be deleted.
5. Click **Actions for Selected Favorites** dropdown at the column header section then, click **delete**.



6. Click on the **Yes** button to confirm deleting the item(s).

DELETE FAVORITE ITEMS

Last Updated on: 4/02/2020

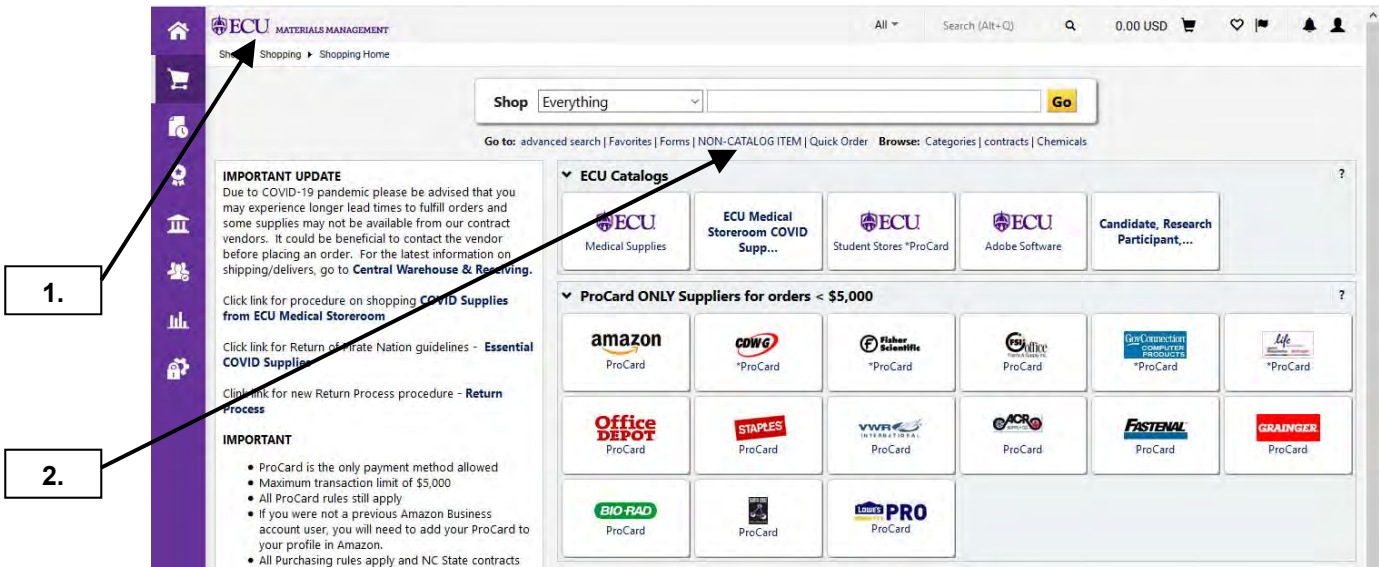
The screenshot shows the ECU Materials Management interface. On the left, a vertical sidebar contains various icons, with the 'ECU Medical Supplies' folder highlighted. Callout box 7 points to this folder. The main area displays a list of items under the 'ECU Medical Supplies' folder. Callout box 8 points to the first item, 'ALCOHOL PREPS LARGE 200/BOX KENDALL 5110'. The list includes the following items:

Item Name	Part Number	Price (USD)	Status
ALCOHOL PREPS LARGE 200/BOX KENDALL 5110	040-21020	5.22	Out of stock / backordered
BULK GAUZE N/S 2"X2" 4PLY 200/PK NW2204	020-20440	0.65	Out of stock
GLASS CLEANER EACH 620682	235-06050	4.04	In stock
LATEX SURGEONS,ST 7.5 SENSIGRI 50 PAIRS/BOX ANSELPERRY7825	120-23240	19.52	In stock

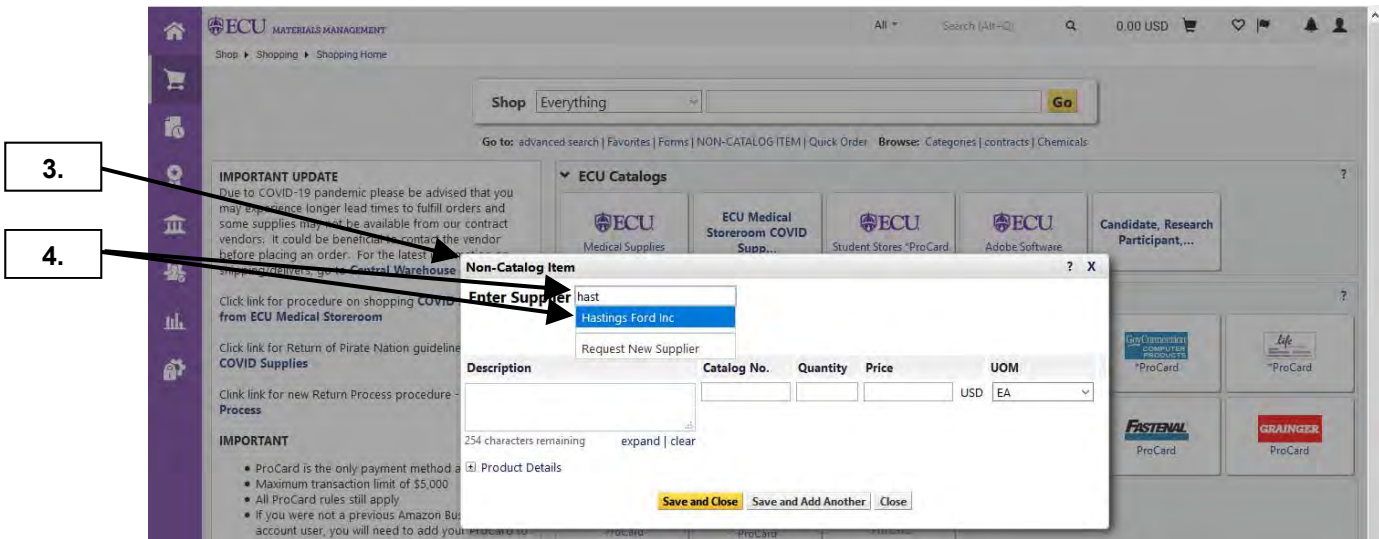
7. Notice that the item(s) has been removed from ECU Medical Supplies folder.
8. This completes the steps for this procedure. Click on **ECU** icon to return to the home page.

SHOPPING CART – NON-CATALOG ITEM

Last Updated on: 7/17/2020



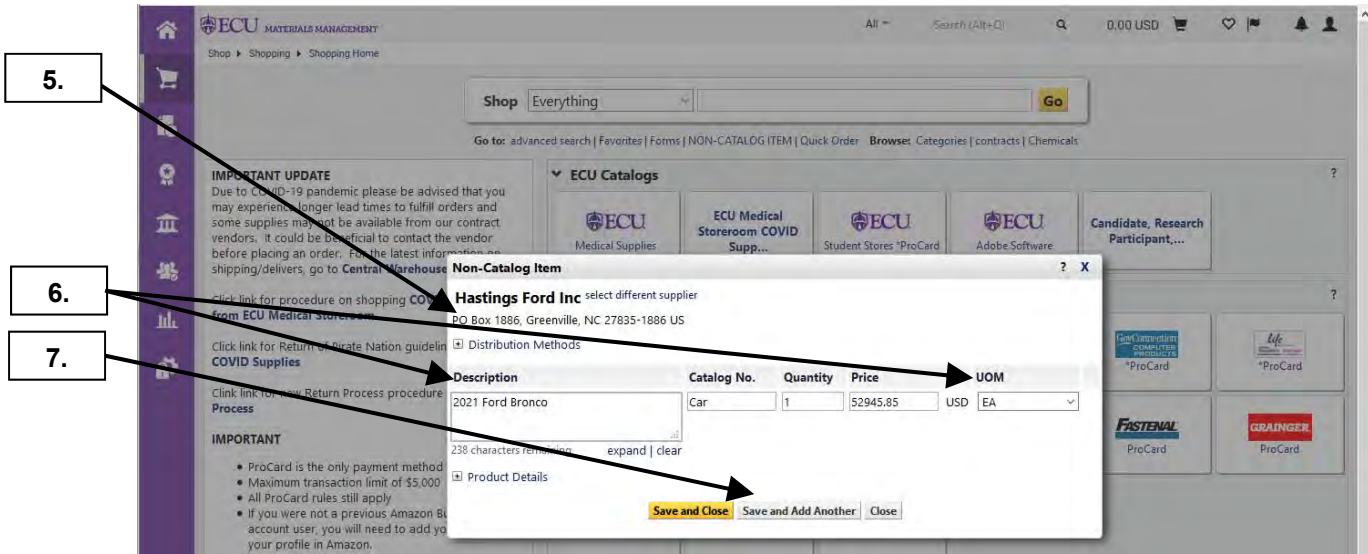
1. Ensure that you are on the **home/shop** page. **Important Note:** The Non-Catalog Item has replaced the non-Catalog Form with a cleaner interface for adding items to a cart.
2. Click on **NON-CATALOG ITEM** link.



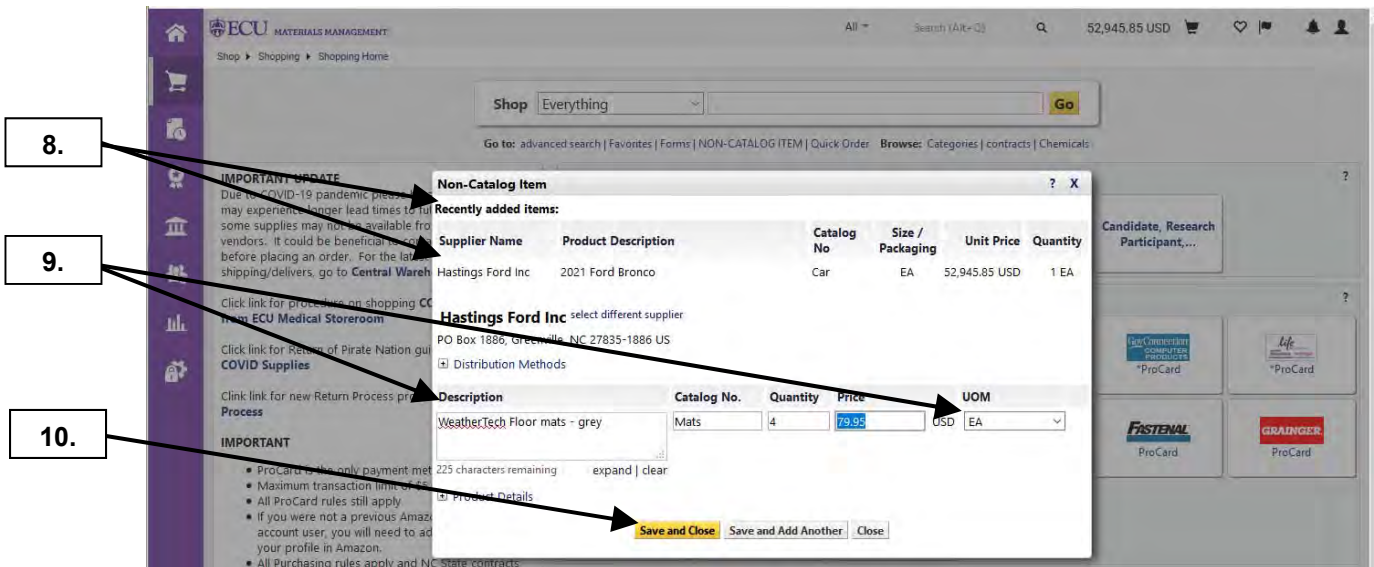
3. A new window pops up to display the **Non-Catalog Item**.
4. Type the Vendor's name in the **Enter Supplier** field. A drop-down list will automatically display and begin filtering based on the characters that you type. Select the appropriate supplier from the list.

SHOPPING CART – NON-CATALOG ITEM

Last Updated on: 7/17/2020



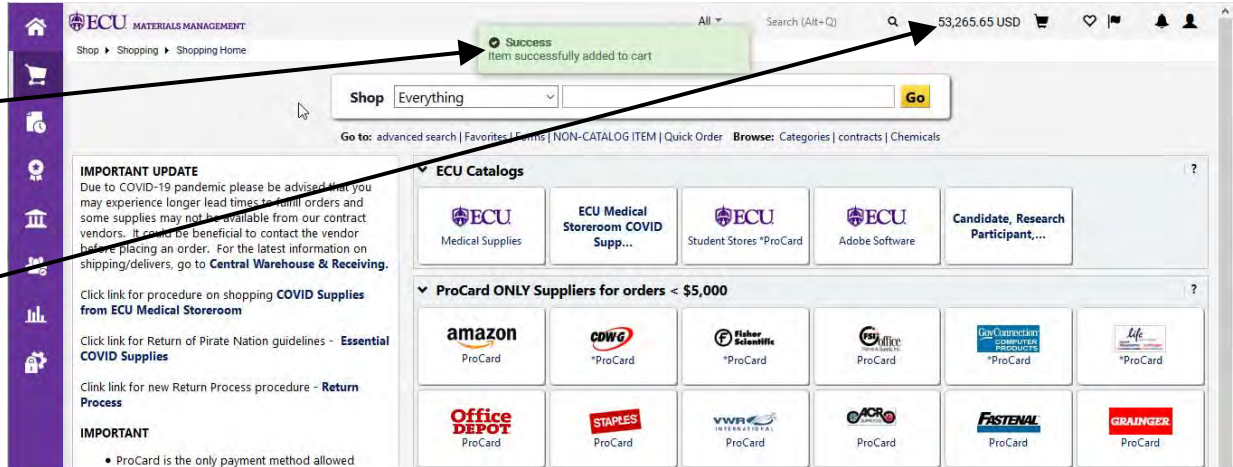
5. Note that the supplier **Fulfillment Address** has been populated.
6. Enter the appropriate information for the following fields: **Description, Catalog No., Quantity, Price, and Unit of Measure (UOM)**. **Note:** The information you are entering should be from supplier's quote. If you do not have a Catalog #, you can enter a descriptive term for the item.
7. If you only have one item, you will click **Save and Close** button and proceed to step 12. For this example, we will have 2 items and click on **Save and Add Another** button.



8. Note the 1st item was added to **Recently added items** section.
9. Enter the appropriate information for the following fields: **Description, Catalog No., Quantity, Price, and Unit of Measure (UOM)**. Repeat steps 6 & 7 until you get to the last line item.
10. Now that we have enter information for our last item, we will click **Save and Close** button.

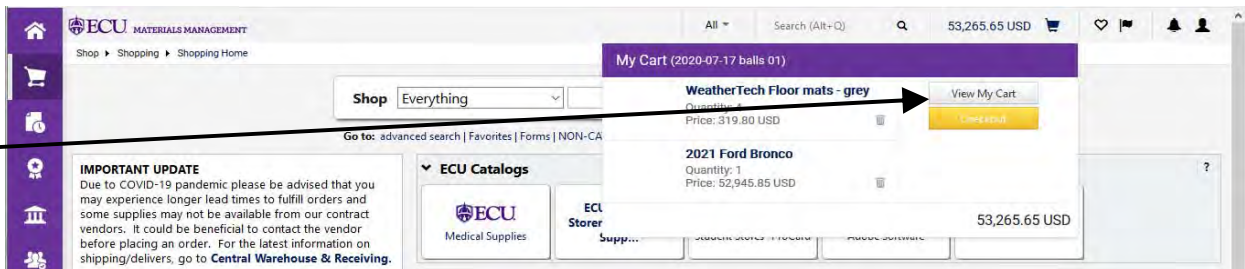
SHOPPING CART – NON-CATALOG ITEM

Last Updated on: 7/17/2020

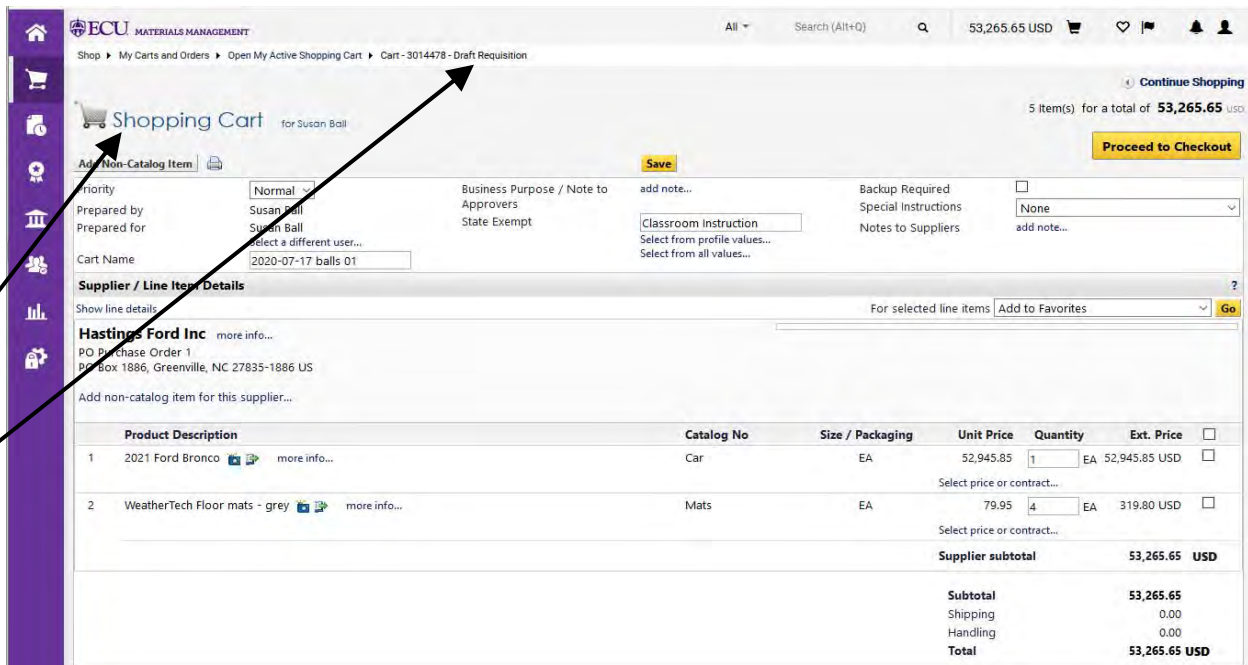


11. The items have been success added to the shopping cart.

12. Click on the shopping cart.



13. Click on **View My Cart** button.

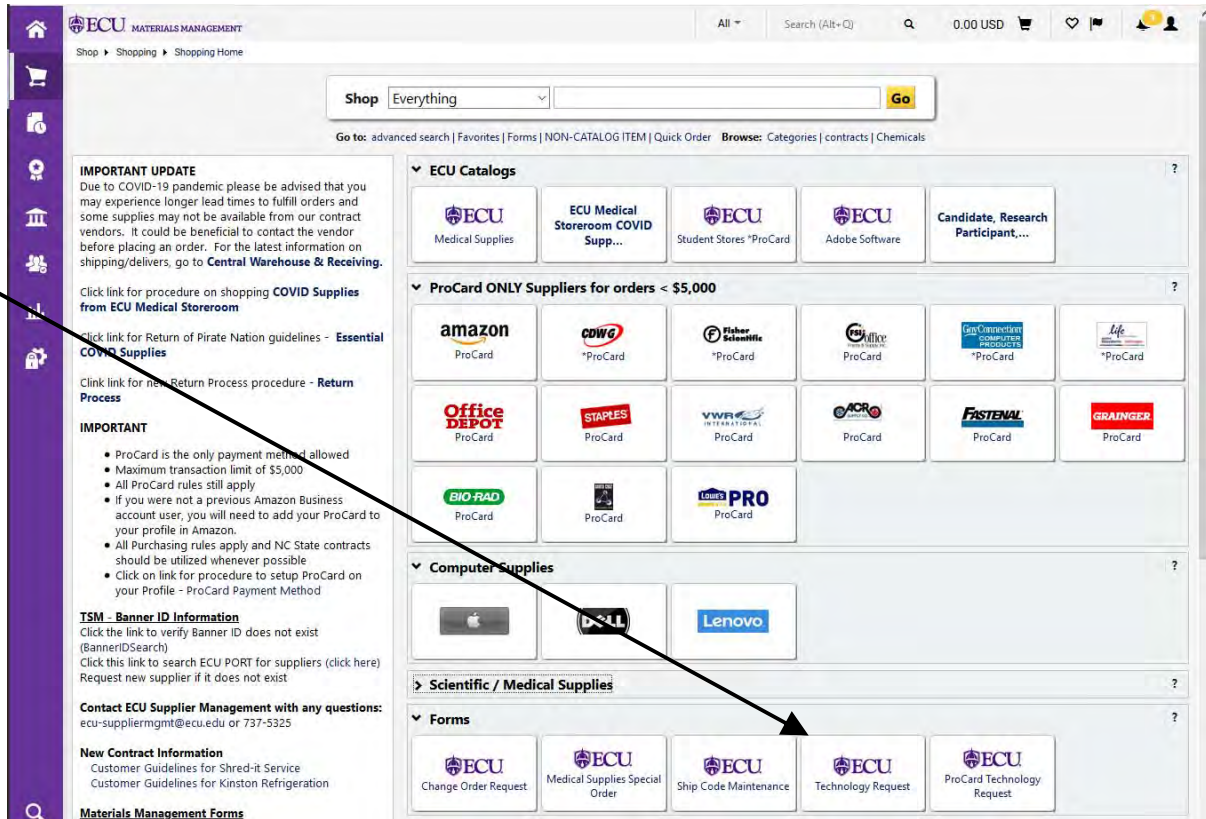


14. This brings you to the **Shopping Cart** review section.

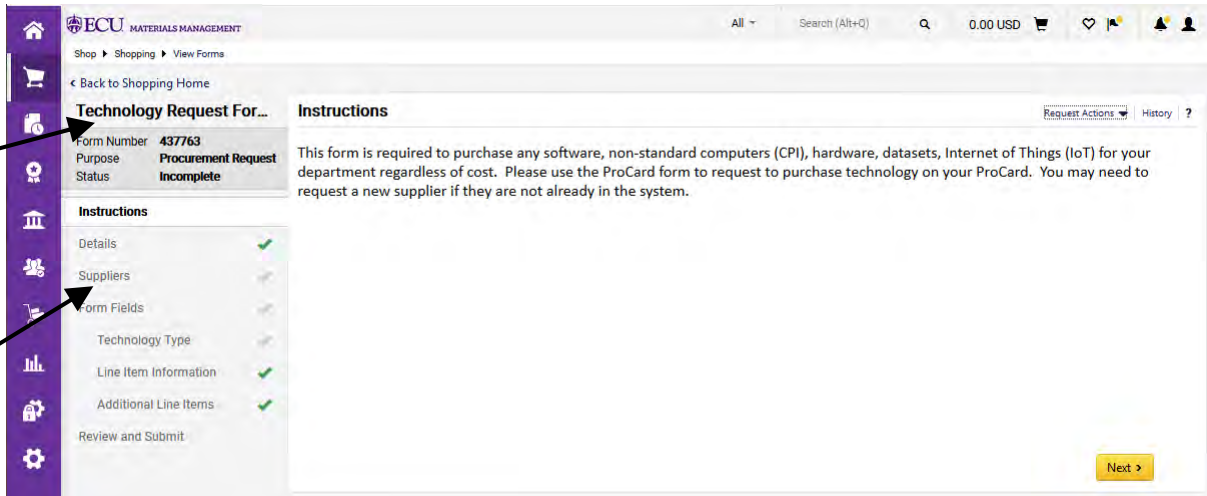
15. **Note:** You can now view future **Requisition #** before you submit the cart. Now if you have issues with a draft cart, you can call Materials Management with the draft **Requisition #** for assistance. See the **Edit Cart Header** procedure to continue the review process.

TECHNOLOGY REQUEST FORM

Last Updated on: 7/17/2020



1. From **Home** page scroll down to **Forms** showcase and select **Technology Request** sticker.



2. The **Technology Request Form** is for software, non-standard computers (Non-CPI), hardware (with software), hardware only, datasets, Internet of Things (IoT), services to generate a PORT Requisition. The **ProCard Technology Request Form** is almost identical with ProCard specific question and required for ITCS approval before completing ProCard transaction. The scope of this form had to evolve to include above technology to allow ITCS to vet potential risk/compliance for the University.
3. Read **Instructions** and proceed by clicking **Suppliers**.

TECHNOLOGY REQUEST FORM

Last Updated on: 7/17/2020

The screenshot shows the 'Suppliers' section of the Technology Request Form. The search criteria are: Supplier: Dell, Relationship: All, and Zip Code: Within 5 Miles. A search button is located at the bottom right of the search area.

4.

4. Enter the Supplier Name or other parameters and press Enter or click **Search** button.

The screenshot shows the search results for suppliers. The results table is as follows:

Supplier Name	Doing Business As	Fulfillment Centers	Action
Dell Marketing LP		PO Purchase Order 9 One Dell Way, Bldg RR8, Round Rock, TX 78682-0384 US	Select
		PO Purchase Order 7 451 Main St, Greenville, NC 27858 US	Select
		PO Purchase Order 5 1482 Capital Blvd, Greenville, NC 278990 US	Select
		PO Purchase Order 6 1522 Winstead Ave, Richmond, VA 20390 US	Select
		PO Purchase Order 2 Warranty Parts Direct, 1 Dell Way Bldg RR8, Round Rock, TX 78682-0384 US	Select
		PO Purchase Order 104 1285 Greenville Blvd, Greenville, NC 27858 US	Select
		PO Purchase Order 8 1450 Main St, Greenville, NC 27858 US	Select
		PO Purchase Order 1: (preferred) One Dell Way, Bldg RR8, Round Rock, TX 78682-0384 US	Select
		PO Purchase Order 10 9286 Winstead Ave, Raleigh, NC 27920 US	Select
		PO Purchase Order 3 1242 Greenville Blvd, Greenville, NC 27858 US	Select
		PO Purchase Order 9 1590 Capital Blvd, Raleigh, NC 27985 US	Select

5.

5. Supplier search may result in multiple options. Select the appropriate Supplier and Fulfillment Center. **Note:** Verify the correct Fulfillment address with a representative from the supplier.

TECHNOLOGY REQUEST FORM

Last Updated on: 7/17/2020

Form Number: 437763
Purpose: Procurement Request
Status: Incomplete

Supplier: Dell Marketing LP
PO Purchase Order 1: One Dell Way, Bldg RR8, Round Rock, TX 78682-0384 US

Supplier Name	Doing Business As	Fulfillment Centers	Action
Dell Marketing LP		PO Purchase Order 9 One Dell Way, Bldg RR8, Round Rock, TX 78682-0384 US	Select
		PO Purchase Order 7 451 Main St, Greenville, NC 27858 US	Select
		PO Purchase Order 5 1482 Capital Blvd, Greenville, NC 27890 US	Select
		PO Purchase Order 6 1522 Winstead Ave, Richmond, VA 20390 US	Select
		PO Purchase Order 2 Warranty Parts Direct, 1 Dell Way Bldg RR8, Round Rock, TX 78682-0384 US	Select
		PO Purchase Order 101 1285 Greenville Blvd, Greenville, NC 27858 US	Select
		PO Purchase Order 8 1450 Main St, Greenville, NC 27858 US	Select
		PO Purchase Order 1: (preferred) One Dell Way, Bldg RR8, Round Rock, TX 78682-0384 US	Select

- Note: Selecting the correct **Fulfillment Center** will populate your form with this selection and be indicated by a green check mark.
- This will complete **Supplier** section of your form. Click **Technology Type** to proceed.

Form Number: 463185
Purpose: Procurement Request
Status: Incomplete

Technology Determination

This Technology Request form is required for the procurement of software, non-standard computers (CPI), hardware, datasets, and Internet of Things (IoT). This form has evolved to be more inclusive to capture other sorts of technology other than software. By changing the name to **Technology Request Form** our goal is to help users across campus realize that the purchase request review process does not only involve software but other forms of technology. The options for the Technology and their respective definitions are indicated below:

- Software - new software, license, or renewals
- Computer (Non-CPI) - desktop, laptop, or windows tablet
- Hardware - equipment with software
- Hardware Only - servers, network switches, printers
- Datasets - collection of data for research
- Internet of Things (IoT) - computing devices embedded in everyday objects, enabling them to send and receive data (ex: smart TVs, HVAC controls, credit card readers, etc.)
- Services - services designed to facilitate the use of technology by the university enterprise and/or end users

Type of Technology Request *

- Review the information and definitions of the 6 types of technology.
- Click Type of Technology Request drop-down box.

TECHNOLOGY REQUEST FORM

Last Updated on: 7/17/2020

The screenshot shows the 'Form Fields - Technology Type' section of the Technology Request Form. The 'Type of Technology Request' dropdown menu is open, displaying the following options: Software, Computer (Non-CPI), Hardware (highlighted in blue), Hardware Only, Datasets, Internet of Things (IoT), and Services. The 'Save Progress' button is highlighted in yellow. Callout box 10 points to the dropdown menu, and callout box 11 points to the 'Save Progress' button.

10. Select appropriate technology for your request. For this example, we'll select **Hardware**.
11. Click **Save Progress** button.

The screenshot shows the 'Form Fields - Technology Type' section of the Technology Request Form. The 'Type of Technology Request' dropdown menu is set to 'Hardware'. The 'Questions' section is visible, indicating that the 'Hardware' selection has triggered the display of this section. Callout box 12 points to the 'Questions' section, and callout box 13 points to the 'Next' button.

12. The **Hardware** (equipment with software) technology is a conditional question that now displays **Question** section that is specific to software. **Note:** Selecting **Software**, **Hardware**, **Datasets**, or **Internet of Things (IoT)** will display this **Question** section of the form. This is required to answer software related questions for these types of technology. Selecting **Computer (Non-CPI)**, **Hardware Only**, or **Services** will not display the **Question** section of this form. If you select **Computer (Non-CPI)**, there will be additional questions within the **Technology Type** section.
13. You can click on **Question** section or **Next** button.

TECHNOLOGY REQUEST FORM

Last Updated on: 7/17/2020

The screenshot shows the 'Technology Request Form' interface. On the left is a purple navigation sidebar with icons for Home, Shopping, and various request types. The main content area is titled 'Technology Request For...' and includes a 'Form Fields - Questions' section. Callout 14 points to a star icon next to the text 'Response Is Required'. Callout 15 points to a dropdown menu showing '2-10'. Callout 16 points to a checkbox labeled 'Enterprise (all faculty/staff/students)'. Callout 17 points to radio buttons for 'Yes' and 'No', and a text input field containing 'ACCT 2245'.

14. **Note:** Required fields are indicated by a star symbol. Some responses are conditional and may populate additional required fields.

15. Select the appropriate quantity of users for each license of the software.

Note: Selecting more than 1 user will require you to answer **ADA questions (Step 21)**.

16. Select **Who will use this product?**

17. Indicate if software is used for academic course. Selecting **Yes** will display conditional field for entering **course ID/name**.

TECHNOLOGY REQUEST FORM

Last Updated on: 7/17/2020

The screenshot shows a web form titled "Where will the software data reside? *". It has two radio button options: "ECU (on a local university server/computer)" which is selected, and "Vendor (on an external (outside of ECU) server/computer, cloud based)". Below this is a section for "Data Use Identification - Classify the type of sensitive data this system will use (see definitions below)". It lists several categories with definitions: Financial (GLBA), Protected Health Information (HIPAA), Academic (FERPA), Credit Card Numbers (PCI), Human Subject Research (IRB), SSN/PII (ITPA), Employment (HR), and General Data Protection Regulation (GDPR). At the bottom, there is a section "Select appropriate option(s) for data: *" with a grid of checkboxes. The "Credit Card Numbers (PCI)" checkbox is checked. Other checkboxes include "No Sensitive Data", "Human Research Subjects (IRB)", "Academic (FERPA)", "Internal Data", "Financial (GLBA)", "Protected Health Information (HIPAA)", "Employment (HR)", and "General Data Protection Regulation (GDPR)".

18.

19.

18. Scroll down the page and click the radio button corresponding to the accurate location where the data will be stored.

19. **Note** the definitions for the various data types. Check all appropriate classifications of data involving this software purchase use.

The screenshot shows a section titled "Sensitive data - 'Information that if disclosed without authorization would have an adverse effect on the operations, assets or reputation of the University.'" Below this is a text area containing a certification statement: "Data Identification Compliance: I hereby certify that the information provided in this request is true and accurate. I understand that it is my responsibility to determine if sensitive data is either transmitted or stored within the proposed system. *". Below the text area is a checkbox labeled "I certify this is correct". At the bottom right of the form, there are three buttons: "Previous", "Save Progress" (highlighted in yellow), and "Next".

20.

20. Select the required **check box** to certify the information provided and click **Next** button to proceed to the next form section.

TECHNOLOGY REQUEST FORM

Last Updated on: 7/17/2020

The screenshot shows the 'Form Fields - ADA Compliance' section of the Technology Request Form. The left sidebar contains a navigation menu with items: Home, Shopping, View Forms, Back to Shopping Home, Technology Request For..., Form Number 437763, Purpose Procurement Request, Status Incomplete, Instructions, Details, Suppliers, Form Fields, Technology Type, Questions, ADA Compliance (highlighted), Line Item Information, Additional Line Items, and Review and Submit. The main content area is titled 'Form Fields - ADA Compliance' and includes a 'Response Is Required' star icon. Under the 'Instructions' section, it says 'To avoid delays in processing, please read all instructions carefully'. The 'Accessibility Section' contains the text: 'Response Is Required. To avoid delays in processing, please read all instructions carefully. What is IT Accessibility? - East Carolina University is committed to providing accessible technology and educational resources. For compliance and purchasing, ECU follows the Section 508 Standards - Software Applications and Operating Systems.' Below this, it states: 'To ensure Section 508 compliance and accessibility to all users, the following outlines specific details related to each option:'. Callout 21 points to the 'ADA Compliance' menu item, and callout 22 points to the 'Accessibility Section' text.

- 21. If more than 1 user was selected in **Step 15** then the **ADA Compliance** section was triggered, and responses will be required to complete the form.
- 22. Information regarding IT Accessibility Standards can be found through the link provided.
Note: Scroll down the page to complete the questions.

The screenshot shows the 'ADA Compliance' section of the Technology Request Form. The left sidebar contains a navigation menu with items: Home, Shopping, View Forms, Questions, ADA Compliance (highlighted), Line Item Information, Additional Line Items, and Review and Submit. The main content area contains the text: 'What is IT Accessibility? - East Carolina University is committed to providing accessible technology and educational resources. For compliance and purchasing, ECU follows the Section 508 Standards - Software Applications and Operating Systems.' Below this, it states: 'To ensure Section 508 compliance and accessibility to all users, the following outlines specific details related to each option:'. The options are:

1. There is a VPAT or vendor affirmation that demonstrates how the software meets Section 508 requirements (Visit VPAT Explained for more information).
A VPAT is a vendor-generated statement that provides relevant information on how a vendor's product or service claims to conform to the Section 508 Standards. The vendor should provide this information to you in either a document or a URL. Please provide copy of VPAT if you have received a copy from the vendor. (upload and continue purchase process)
2. The software qualifies for one of the following exceptions: Back Office, Technical and Programmatic Standards, or Assistive Technology (visit IT Purchasing - Accessibility Hardware Exemptions and Software Exceptions for more information).
These exceptions do not require an Equally Effective Alternative Access Plan for an accommodation.
3. The software qualifies for a Commercially Unavailable exception or Fundamental Alteration (these exceptions are rare - visit IT Purchasing - Accessibility Hardware Exemptions and Software Exceptions for more information), or the software does not meet Section 508 requirements.
In this instance, an Equally Effective Alternative Access Plan is required for any inaccessible portions of the product and must be approved by the ADA Coordinator. By making this selection, an IT Accessibility Consultant will be notified to contact you to assist with the creation of an Equally Effective Alternative Access Plan.
4. If you are not sure, need assistance, or the software you are purchasing will be used Enterprise-wide, we recommend you consult with the IT Accessibility Consultant. By making this selection, an IT Accessibility Consultant will be notified to contact you to assist with an IT accessibility review of the software. TD request for IT Accessibility Consultation.

Below the options, it says: 'Select one option that applies to your purchase: *'. The radio button options are:

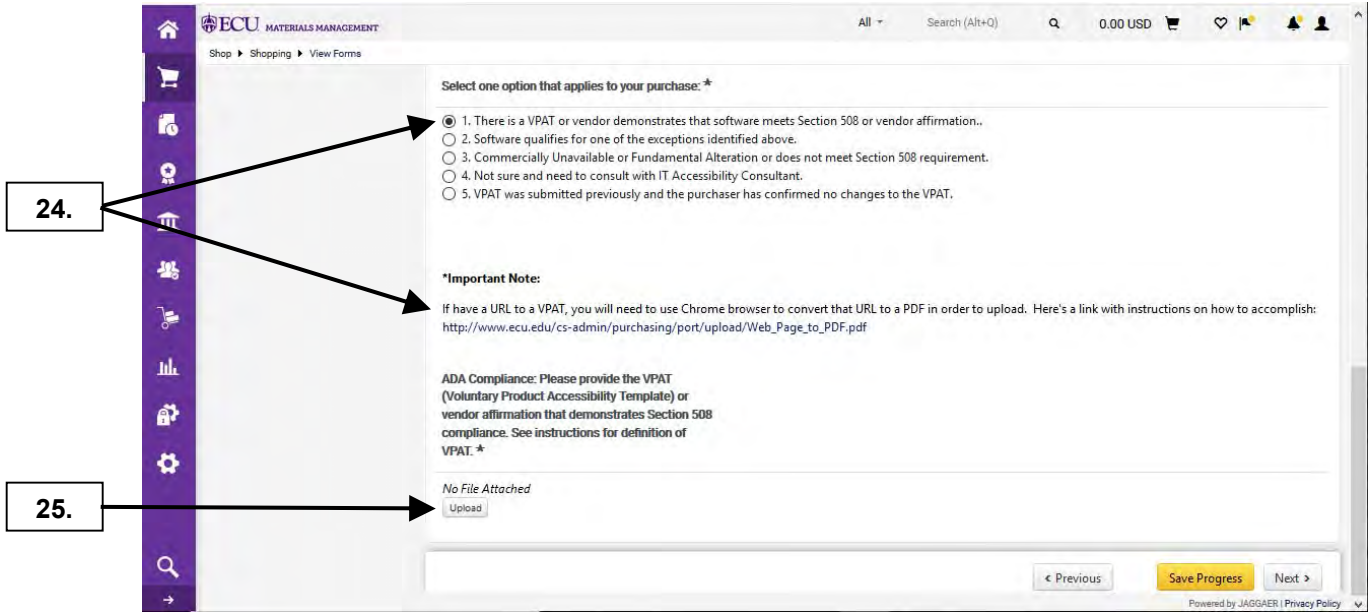
- 1. There is a VPAT or vendor demonstrates that software meets Section 508 or vendor affirmation..
- 2. Software qualifies for one of the exceptions identified above.
- 3. Commercially Unavailable or Fundamental Alteration or does not meet Section 508 requirement.
- 4. Not sure and need to consult with IT Accessibility Consultant.
- 5. VPAT was submitted previously and the purchaser has confirmed no changes to the VPAT.

Callout 23 points to the radio button options.

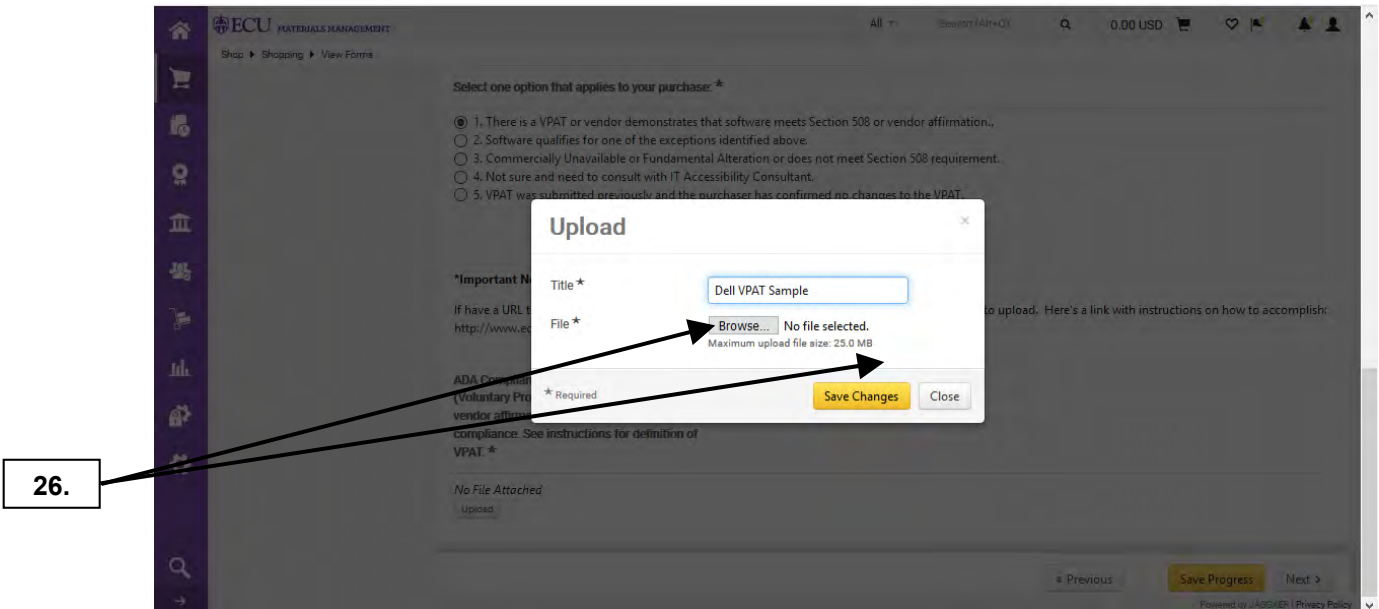
- 23. Details related to the required **Radio Button** options are provided in the **ADA Compliance** section of the Technology Request Form. **Note:** Selections are conditional and additional required fields may populate. Read each option thoroughly and select the **Radio Button** corresponding with the appropriate response. Additional information is provided by following the **links** in each detailed option.

TECHNOLOGY REQUEST FORM

Last Updated on: 7/17/2020



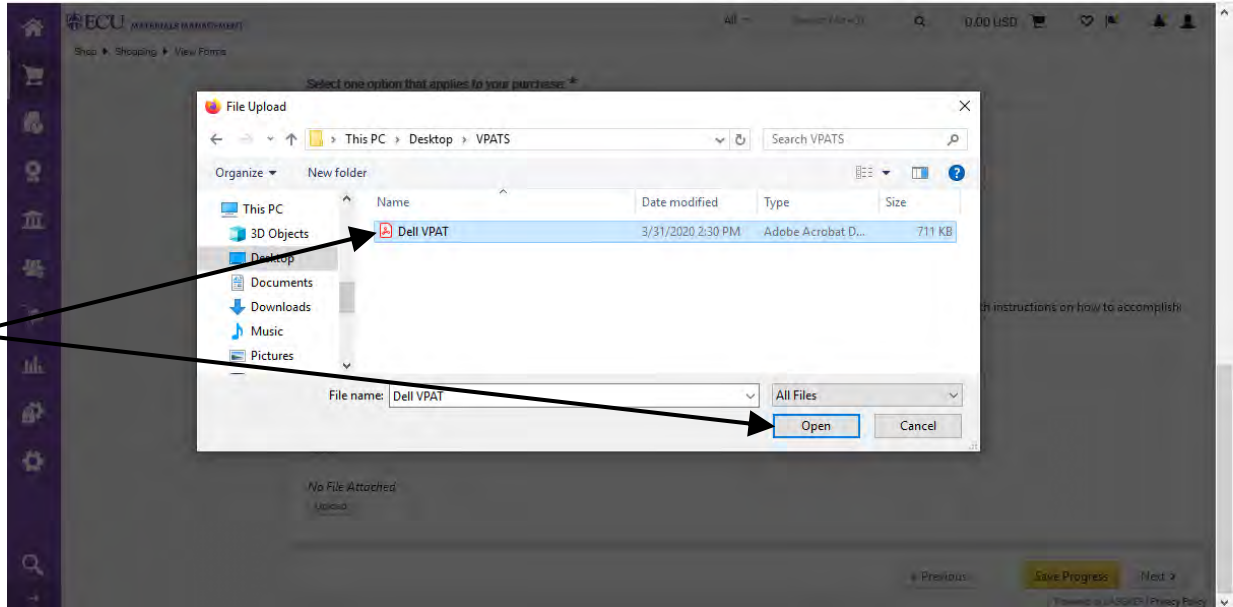
- 24. Selecting Option 1 will require a **VPAT** document to be loaded to the Technology Request Form. **Note:** VPAT documents are provided by the supplier. A procedure to create this document from a supplier's website is provided using Chrome browser.
- 25. Once the VPAT document is obtained, upload the file from your computer by selecting the Upload button.



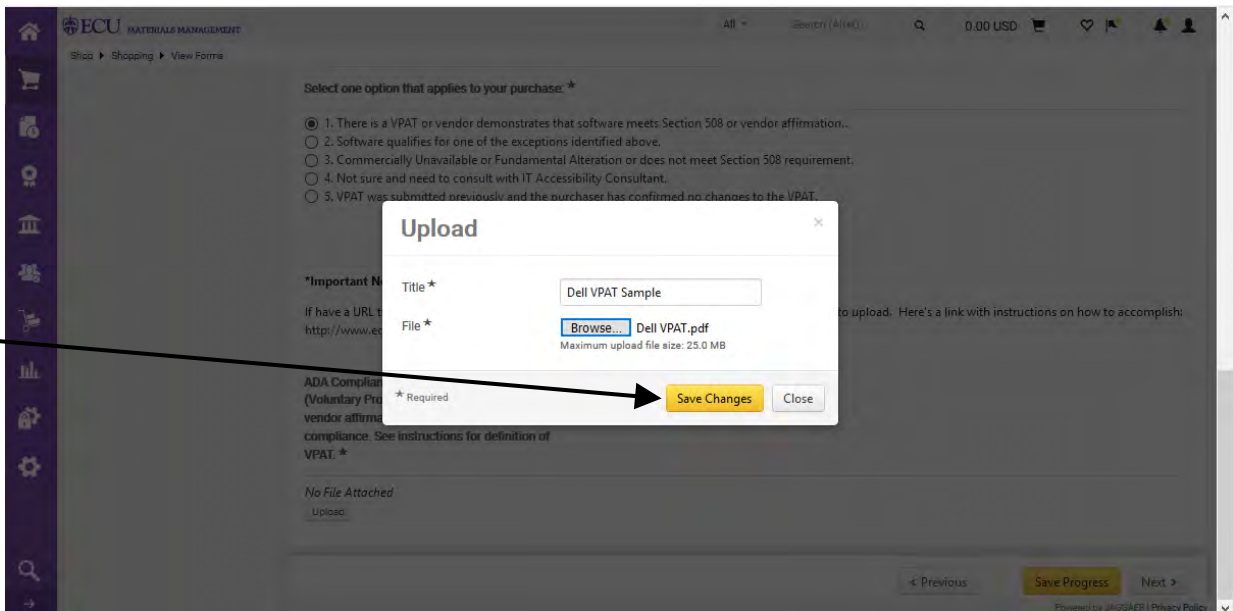
- 26. Name your upload appropriately and click Browse to find your file.

TECHNOLOGY REQUEST FORM

Last Updated on: 7/17/2020



27. Browse to, select the file, and click **Open**.



28. Click **Save Changes** to upload the file.

TECHNOLOGY REQUEST FORM

Last Updated on: 7/17/2020

The screenshot shows a web form titled "ECU MATERIALS MANAGEMENT" with a navigation menu on the left. The main content area has a heading "Select one option that applies to your purchase: *". Below this are five radio button options: 1. There is a VPAT or vendor demonstrates that software meets Section 508 or vendor affirmation.. (selected), 2. Software qualifies for one of the exceptions identified above., 3. Commercially Unavailable or Fundamental Alteration or does not meet Section 508 requirement., 4. Not sure and need to consult with IT Accessibility Consultant., 5. VPAT was submitted previously and the purchaser has confirmed no changes to the VPAT. Below the options is an "Important Note" section with a URL: http://www.ecu.edu/cs-admin/purchasing/port/upload/Web_Page_to_PDF.pdf. Underneath is an "ADA Compliance" section with a link to "Dell VPAT Sample" and an "Upload" button. At the bottom right, there are "Previous", "Save Progress", and "Next" buttons. A box labeled "29." has arrows pointing to the "Dell VPAT Sample" link and the "Next" button.

29. The VPAT file has been attached to your Technology Request Form. Click **Next** to proceed to the **Line Item Information** section of your request. You can proceed to step 41 for instructions for adding line items if you only select option 1. Steps 31 – 40 will go through remaining ADA selections.

The screenshot shows the same web form as above, but with different content. The heading is "Standards. The vendor should provide this information to you in either a document or a URL. Please provide copy of VPAT if you have received a copy from the vendor, (upload and continue purchase process)". Below this are two main sections. The first section has a heading "2. The software qualifies for one of the following exceptions: Back Office, Technical and Programmatic Standards, or Assistive Technology (visit IT Purchasing - Accessibility Hardware Exemptions and Software Exceptions for more information)." followed by "These exceptions do not require an Equally Effective Alternative Access Plan for an accommodation." and "3. The software qualifies for a Commercially Unavailable exception or Fundamental Alteration (these exceptions are rare – visit IT Purchasing - Accessibility Hardware Exemptions and Software Exceptions for more information), or the software does not meet Section 508 requirements." followed by "In this instance, an Equally Effective Alternative Access Plan is required for any inaccessible portions of the product and must be approved by the ADA Coordinator. By making this selection, an IT Accessibility Consultant will be notified to contact you to assist with the creation of an Equally Effective Alternative Access Plan." and "4. If you are not sure, need assistance, or the software you are purchasing will be used Enterprise-wide, we recommend you consult with the IT Accessibility Consultant. By making this selection, an IT Accessibility Consultant will be notified to contact you to assist with an IT accessibility review of the software. TD request for IT Accessibility Consultation." Below this is another "Select one option that applies to your purchase: *" section with five radio button options: 1. There is a VPAT or vendor demonstrates that software meets Section 508 or vendor affirmation.., 2. Software qualifies for one of the exceptions identified above. (selected), 3. Commercially Unavailable or Fundamental Alteration or does not meet Section 508 requirement., 4. Not sure and need to consult with IT Accessibility Consultant., 5. VPAT was submitted previously and the purchaser has confirmed no changes to the VPAT. Below this is a "Select the exception for which the software qualifies *" section with four radio button options: Back Office, Programmatic and Technical Academic Standards, Assistive Technology, Work Productivity. At the bottom is an "Enter justification for exception: *" section with a text input field. At the bottom right, there are "Previous", "Save Progress", and "Next" buttons. A box labeled "30." has arrows pointing to the "2. The software qualifies for one of the following exceptions..." section, the "2. Software qualifies for one of the exceptions identified above." radio button, and the "Enter justification for exception: *" text input field. A box labeled "31." has an arrow pointing to the "2. The software qualifies for one of the following exceptions..." section.

30. Selecting option 2 will require you to identify the qualifying exception. Click the Radio button corresponding with the exception identified above.

31. Open the Accessibility information link for details.

TECHNOLOGY REQUEST FORM

Last Updated on: 7/17/2020

32. Selecting an exception to the review will require a **justification**. Type the justification in the provided box.

33. Click **Next** to continue to the **Line Item Information** section of the form (step 41).

34. Select option 3 if the software **does not** meet Section 508 requirements. Click the **Accessibility Information** link for additional information regarding this exception.

35. Select the corresponding exception by clicking the Radio button
Note: By selecting this option an **IT Accessibility Consultant** will contact you.

36. Click **Next** to proceed to the **Line Item Information** section of your form (step 41).

TECHNOLOGY REQUEST FORM

Last Updated on: 7/17/2020

Shop > Shopping > View Forms

In this instance, an Equally Effective Alternative Access Plan is required for any inaccessible portions of the product and must be approved by the ADA Coordinator. By making this selection, an IT Accessibility Consultant will be notified to contact you to assist with the creation of an Equally Effective Alternative Access Plan.

4. If you are not sure, need assistance, or the software you are purchasing will be used Enterprise-wide, we recommend you consult with the IT Accessibility Consultant. By making this selection, an IT Accessibility Consultant will be notified to contact you to assist with an IT accessibility review of the software. TD request for IT Accessibility Consultation.

Select one option that applies to your purchase: *

- 1. There is a VPAT or vendor demonstrates that software meets Section 508 or vendor affirmation..
- 2. Software qualifies for one of the exceptions identified above.
- 3. Commercially Unavailable or Fundamental Alteration or does not meet Section 508 requirement.
- 4. Not sure and need to consult with IT Accessibility Consultant.
- 5. VPAT was submitted previously and the purchaser has confirmed no changes to the VPAT.

< Previous Save Progress Next >

- 37. Select option 4 if assistance from an **IT Accessibility Consultant** is necessary.
- 38. Click **Next** to continue to the **Line Item Information** section of your form (step 41).

Shop > Shopping > View Forms

Details ✓
Suppliers ✓
Form Fields ✓
Technology Type ✓
Questions ✓
ADA Compliance ✓
Line Item Information ✓
Additional Line Items ✓
Review and Submit

Accessibility Section

Accessibility Section
Response Is Required. To avoid delays in processing, please read all instructions carefully.

What is IT Accessibility? - East Carolina University is committed to providing accessible technology and educational resources. For compliance and purchasing, ECU follows the Section 508 Standards - Software Applications and Operating Systems.

To ensure Section 508 compliance and accessibility to all users, the following outlines specific details related to each option:

1. There is a VPAT or vendor affirmation that demonstrates how the software meets Section 508 requirements (Visit VPAT Explained for more information).
A VPAT is a vendor-generated statement that provides relevant information on how a vendor's product or service claims to conform to the Section 508 Standards. The vendor should provide this information to you in either a document or a URL. Please provide copy of VPAT if you have received a copy from the vendor. (upload and continue purchase process)
2. The software qualifies for one of the following exceptions: Back Office, Technical and Programmatic Standards, or Assistive Technology (visit IT Purchasing - Accessibility Hardware Exemptions and Software Exceptions for more information).
These exceptions do not require an Equally Effective Alternative Access Plan for an accommodation.
3. The software qualifies for a Commercially Unavailable exception or Fundamental Alteration (these exceptions are rare – visit IT Purchasing - Accessibility Hardware Exemptions and Software Exceptions for more information), or the software does not meet Section 508 requirements.
In this instance, an Equally Effective Alternative Access Plan is required for any inaccessible portions of the product and must be approved by the ADA Coordinator. By making this selection, an IT Accessibility Consultant will be notified to contact you to assist with the creation of an Equally Effective Alternative Access Plan.
4. If you are not sure, need assistance, or the software you are purchasing will be used Enterprise-wide, we recommend you consult with the IT Accessibility Consultant. By making this selection, an IT Accessibility Consultant will be notified to contact you to assist with an IT accessibility review of the software. TD request for IT Accessibility Consultation.

Select one option that applies to your purchase: *

- 1. There is a VPAT or vendor demonstrates that software meets Section 508 or vendor affirmation..
- 2. Software qualifies for one of the exceptions identified above.
- 3. Commercially Unavailable or Fundamental Alteration or does not meet Section 508 requirement.
- 4. Not sure and need to consult with IT Accessibility Consultant.
- 5. VPAT was submitted previously and the purchaser has confirmed no changes to the VPAT.

< Previous Save Progress Next >

- 39. Select option 5 only when the **VPAT** document has previously been submitted and no changes have been verified.
- 40. Click **Next** to proceed to the **Line Item Information** section of your form.

TECHNOLOGY REQUEST FORM

Last Updated on: 7/17/2020

The screenshot shows the 'Form Fields - Line Item Information' section of the ECU Materials Management system. It displays three line items with the following details:

Item	Unit Price	Unit of Measure	Quantity	Total
Item 1	1295.95	EA - Each	1.0000	0.00 USD
Item 2	2278.95	EA - Each	1.0000	0.00 USD
Item 3		EA - Each		0.00 USD

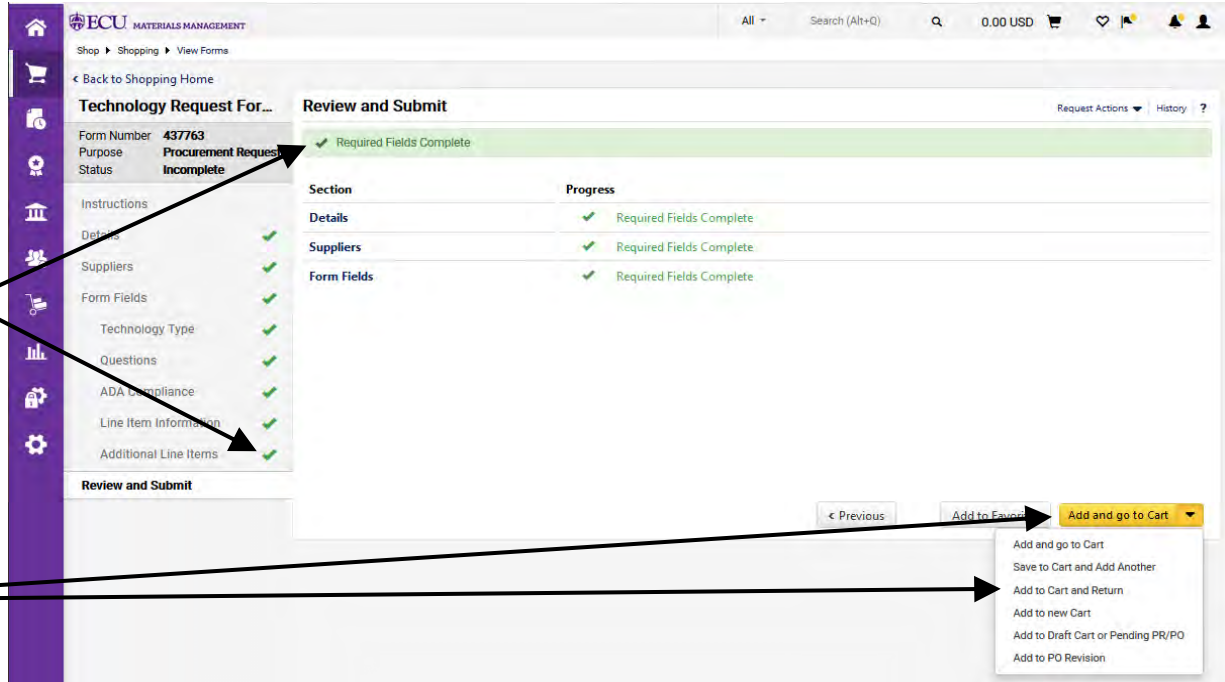
Callout boxes indicate the following fields and actions:

- 41.** Points to the Unit Price and Quantity input fields for Item 1.
- 42.** Points to the Product Description and Catalog No. input fields for Item 1.
- 43.** Points to the 'Next >' button at the bottom right of the form.

- 41.** In the **Line Item Information** section enter the **Unit Price** and **Quantity** for each line item.
Note: A dollar sign is not required in the Unit Price field. A minimum quantity of 1 is required. This information will populate on your **Requisition**.
- 42.** Enter the **Product Description** and **Catalog No.** as given on any quotation from the supplier.
Note: You may enter up to 10 line items on each Technology Request Form. If your order requires more than 10 line items an additional Technology Request Form can be added to your **shopping cart**.
- 43.** If your order has between 5 – 10 items, click **Next**. Otherwise, you can click **Review and Submit** section of your form.

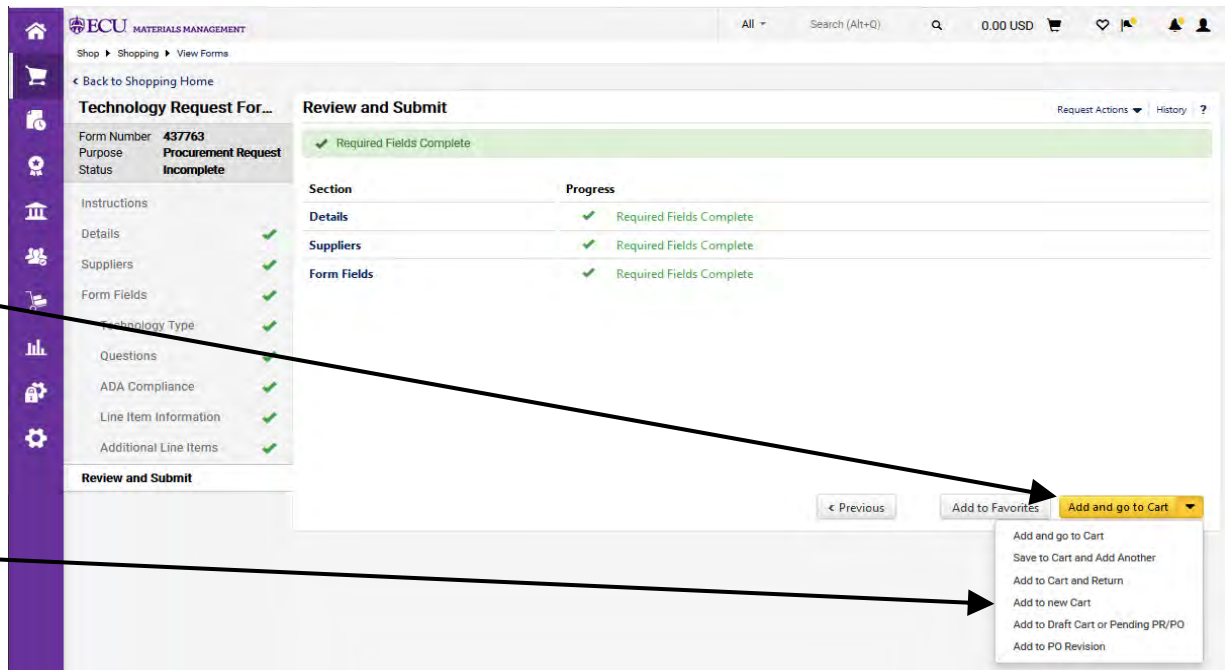
TECHNOLOGY REQUEST FORM

Last Updated on: 7/17/2020



44. You may review each section of the Technology Request Form from the navigation pane. A Green Check will indicate the required fields have been satisfied.

45. If you have more than 10 items, you can click the drop-down box and select **Add to Cart and Return**. This will add your cart and bring you back to beginning of Technology Request form. On the last group of 10 items, you would click **Add and go to Cart**.



46. The Technology Request Form is a “Do Not Mix” form. The **Add and go to Cart** action will create an error if there are items or other forms currently in your active Cart. **Important Note:** Selecting the action **Add to new Cart** if your active cart has another form type or items from another supplier.

47. **Add and go to Cart** is the default selection and we will click to proceed with your purchase request.

TECHNOLOGY REQUEST FORM

Last Updated on: 7/17/2020

ECU MATERIALS MANAGEMENT

Shop > My Carts and Orders > Open My Active Shopping Cart > Cart - 2938670 - Draft Requisition

3,574.90 USD

Continue Shopping

Almost ready to go! The list below needs to be addressed before the cart can be submitted.

- Required field: State Exempt

Shopping Cart for Bridget Brown

2 Item(s) for a total of 3,574.90 USD

Proceed to Checkout

Save

Priority: Normal

Prepared by: Bridget Brown

Prepared for: Bridget Brown

Cart Name: 2020-04-02 brownb 06

Business Purpose / Note to Approvers: State Exempt

Backup Required:

Special Instructions: None

Notes to Suppliers:

Supplier / Line Item Details

Show line details

For selected line items: Add to Favorites Go

Dell Marketing LP

PO Purchase Order 1

One Dell Way, Bldg RR8, Round Rock, TX 78682-0384 US

Free Shipping over 50.00 USD

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
Technology Request Form - 8/2019					
1 Sample equipment for Patient treatment Procurement Request: Technology Request Form - 8/2019	2E345-553335	EA	1,295.95	1	1,295.95 USD
2 Sample software for equipment Procurement Request: Technology Request Form - 8/2019	4D098-223489	EA	2,278.95	1	2,278.95 USD
Form Total:			3,574.90		
Supplier subtotal					3,574.90 USD
Subtotal					3,574.90
Shipping					0.00
Handling					0.00
Total					3,574.90 USD

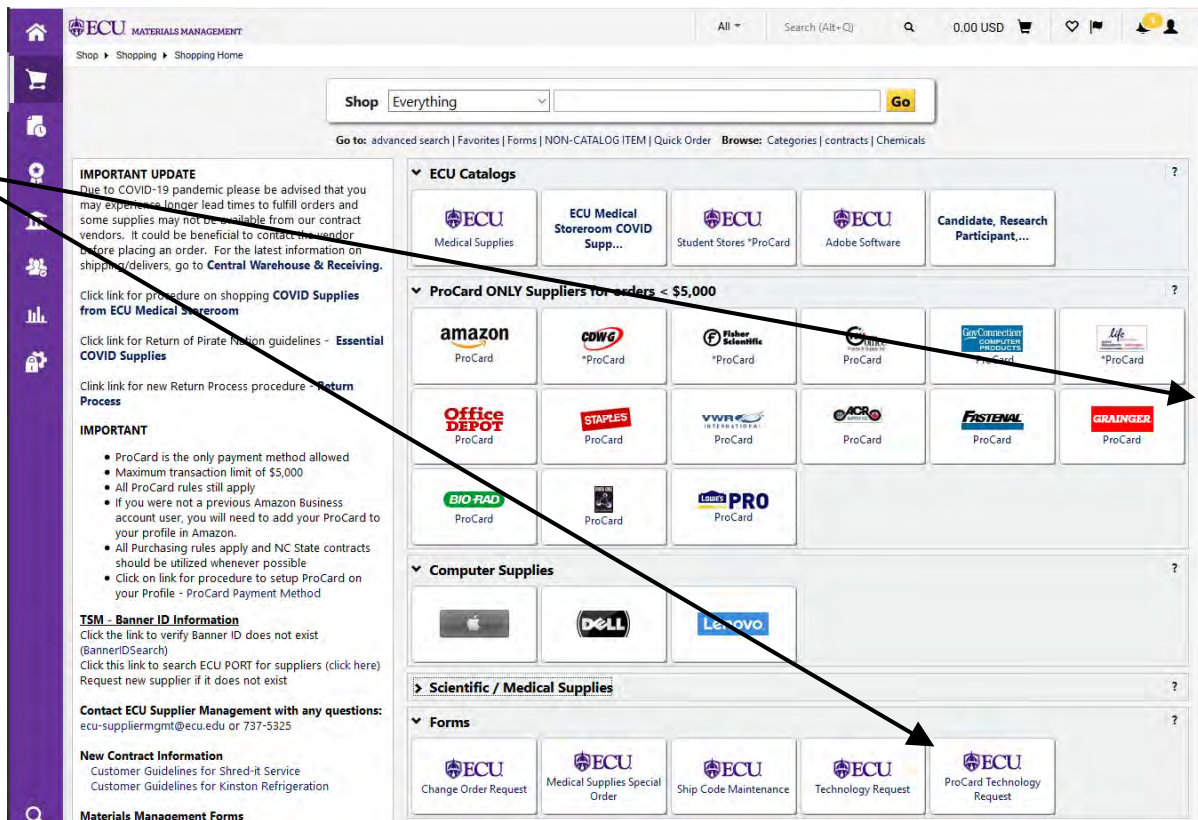
Save

Proceed to Checkout

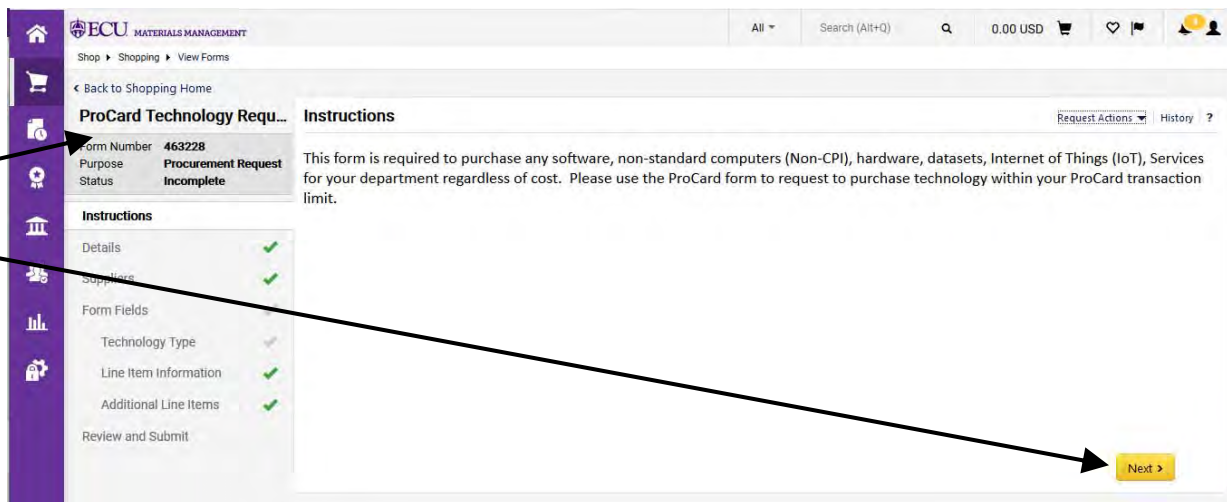
48. Your **Technology Request Form** has now been added to a Cart and is indicated by the **Form Name** and **Form Image Icon**.
49. **Note:** You can now view the future Requisition # before you submit the cart. Now if you have issues with a draft cart, you can call Materials Management with the future Requisition # for assistance.
50. See the Edit Cart Header procedure to continue the review process.

PROCARD TECHNOLOGY REQUEST FORM

Last Updated on: 7/17/2020



1. From the **PORT** home page, scroll down to **Forms** showcase and click on the **ProCard Technology Request** sticker.



2. **ProCard Technology Request** is for ProCard payment only. This form is completed to receive ITCS approval prior to completing ProCard transaction for Technology Requested items.
3. Read the **Instructions** and proceed by clicking **Next**.

PROCARD TECHNOLOGY REQUEST FORM

Last Updated on: 7/17/2020

ECU MATERIALS MANAGEMENT

Shop > Shopping > View Forms

< Back to Shopping Home

ProCard Technology Requ... Details

Form Number 463228
Purpose Procurement Request
Status Incomplete

Form Name * ProCard Technology Request Form

Purpose Procurement Request

Template Title ProCard Technology Request Form - 7/2020

Form Type Purchase Request

Currency USD

★ Required

< Previous Save Progress Next >

4. Name the form with your desired title for ease of access.
5. Click **Save Progress** button then **Next** button to proceed.

ECU MATERIALS MANAGEMENT

Shop > Shopping > View Forms

< Back to Shopping Home

ProCard Technology Requ... Suppliers

Form Number 463228
Purpose Procurement Request
Status Incomplete

Supplier ECU Materials Management
PO 1: 200 E 1st St, Greenville, NC 27858-4353 US

Supplier Name	Doing Business As	Fulfillment Centers	Additional Supplier Distribution Data	Action
ECU Materials Management		PO 1: (preferred) 200 E 1st St, Greenville, NC 27858-4353 US		Selected

Technology Type

< Previous Next >

6. ECU Materials Management is the default supplier for the **ProCard Technology Request**. **Note:** This is due to the fact that not all ProCard Suppliers exist in Banner/PORT. Click **Technology Type** to proceed.

PROCARD TECHNOLOGY REQUEST FORM

Last Updated on: 7/17/2020

The screenshot shows the 'ProCard Technology Request Form' in a web browser. The page title is 'Form Fields - Technology Type'. The form includes a sidebar with navigation options like 'Details', 'Suppliers', 'Form Fields', 'Technology Type', 'Line Item Information', 'Additional Line Items', and 'Review and Submit'. The main content area is titled 'Technology Determination' and contains a paragraph explaining the form's purpose and a bulleted list of technology types: Software, Computer (CPI), Hardware, Hardware Only, Datasets, Internet of Things (IoT), and Services. Below this list is a dropdown menu labeled 'Type of Technology Request *' with 'Software' selected. At the bottom right, there are buttons for '< Previous', 'Save Progress', and 'Next >'. Three numbered callouts are present: '7.' points to the 'Technology Determination' section header, '8.' points to the dropdown menu, and '9.' points to the 'Save Progress' button.

7. Review the information and definitions of the 7 types of technology.
8. When you select the drop-down box for **Types of Technology Request**, you will see the options from above definitions. Select the appropriate technology for your request. For this example, we will select **Software**.
9. Click **Save Progress** button.

PROCARD TECHNOLOGY REQUEST FORM

Last Updated on: 7/17/2020

The screenshot shows the 'Form Fields - Technology Type' section of the ProCard Technology Request Form. The left sidebar contains a navigation menu with a 'Questions' section highlighted by a box labeled '10.'. The main content area displays the 'Technology Determination' section, which includes a list of technology types: Software, Computer (CPI), Hardware, Hardware Only, Datasets, Internet of Things (IoT), and Services. A dropdown menu for 'Type of Technology Request' is set to 'Software'. A 'Next' button is highlighted with a box labeled '11.'. The form also shows a 'Response Is Required' indicator and a 'Save Progress' button.

10. The **Software** technology is a conditional question that now displays **Question** section that is specific to software. **Note:** Selecting **Software**, **Hardware**, **Datasets**, or **Internet of Things (IoT)** will display this **Questions** section of the form. This is required to answer software related questions for these types of technology. Selecting **Computer (Non-CPI)**, **Hardware Only**, or **Services** will not display **Questions** section of this form. If you select **Computer (Non-CPI)**, there will be additional questions within **Technology Type** section.

11. You can click on **Questions** section or **Next** button.

The screenshot shows the 'Form Fields - Questions' section of the ProCard Technology Request Form. The left sidebar contains a navigation menu with a 'Questions' section highlighted by a box labeled '12.'. The main content area displays the 'Software Questions' section, which includes a list of questions and a text input field for 'Cardholder Name (if different than user submitting form request)'. A box labeled '13.' highlights the 'Cardholder Name' field. The form also shows a 'Response Is Required' indicator and a 'Save Progress' button.

12. Under the Questions section of Form Fields all fields with a star require a response. Your request for software purchase will not be complete until all information in this section is provided.

13. Enter **Cardholder Name** (if different than user submitting form request), **Name of Vendor**, and scroll down to continue with **Form Fields – Questions**.

PROCARD TECHNOLOGY REQUEST FORM

Last Updated on: 7/17/2020

The screenshot shows a web form titled "ECU MATERIALS MANAGEMENT". The form is titled "Approximately how many people will use the software? (A re-evaluation of the software may be needed as the number of users increases)*". Field 14 points to a dropdown menu with "2-10" selected. Field 15 points to the "Who will use the product? (Check all that apply)*" section, which includes checkboxes for "Enterprise (all faculty/staff/students)", "Students", "General Public", "Faculty/Staff", and "Departmental Use". Field 16 points to the "Is this purchase for an academic course?*" section, where "Yes" is selected, and a text input field below contains "ENG 1122". Field 17 points to the "Where will the software data reside?*" section, where "Vendor (on an external (outside of ECU) server/computer, cloud based)" is selected.

14. Select the appropriate quantity for your software.

Note: Selecting more than 1 user will require you to answer ADA questions.

15. Select **Who will use this product**, check **All that apply**.

16. If your software purchase will be used in conjunction with an academic course, select **Yes** and a field will populate to the list requiring the course **ID/name**. If the purchase is not for a course, select **No** and proceed.

17. Click the radio button corresponding to the accurate location where the data will be stored. **Note:** Data which resides outside of ECU may require additional documentation, **Memorandums of Understanding (MOU)**, before your request can be processed.

The screenshot shows the "Data Use Identification - Classify the type of sensitive data this system will use (see definitions below)." section. Field 18 points to the definitions and the selection checkboxes. The definitions include: Financial (GLBA), Protected Health Information (HIPAA), Academic (FERPA), Credit Card Numbers (PCI), Human Subject Research (IRB), SSN/PII (ITPA), Employment (HR), and General Data Protection Regulation (GDPR). The selection checkboxes at the bottom include: "No Sensitive Data" (checked), "Credit Card Numbers (PCI)", "Financial (GLBA)", "Human Research Subjects (IRB)", "Protected Health Information (HIPAA)", "SSN/PII (ITPC)", "Academic (FERPA)", "Employment (HR)", and "Internal Data".

18. **Note** the definitions for the various data types. Check all appropriate classifications of data involving the use of this software purchase.

PROCARD TECHNOLOGY REQUEST FORM

Last Updated on: 7/17/2020

19. I certify this is correct

20. Will this be an annual renewal? *

Yes No

Sensitive data - "Information that if disclosed without authorization would have an adverse effect on the operations, assets or reputation of the University."

Data Identification Compliance: I hereby certify that the information provided in this request is true and accurate. I understand that it is my responsibility to determine if sensitive data is either transmitted or stored within the proposed system. *

19. Click the required check box to certify the information provided.

20. Click the appropriate radio button to indicate if this will be an annual renewal.

21. Yes No

Is the vendor a foreign supplier? *

Is this a purchase of all substantial rights to use the product?

Yes No

Is there a server providing the software service? If so, where is the server located?

2000 characters remaining

Is this a payment for the use of a software product?

2000 characters remaining

Will anyone from abroad come to East Carolina University to install the software? *

Yes No

22. [Text input fields for server location and software product details]

23. [Text input field for software product details]

24. [Next >](#)

Save Progress

21. If you select the **Yes** radio button, more conditional questions will display for entering further details about the vendor. For this example, we will select **No**.

22. Provide as much detail about rights, storage location, and product details to avoid delays in processing.

23. Indicate whether anyone abroad will come to ECU to install software.

24. Click the **Next** button.

PROCARD TECHNOLOGY REQUEST FORM

Last Updated on: 7/17/2020

The screenshot shows the 'ProCard Technology Request' form in the 'MATERIALS MANAGEMENT' system. The form is titled 'Form Fields - ADA Compliance' and includes a sidebar with navigation options. The main content area is divided into sections: 'Instructions' (To avoid delays in processing, please read all instructions carefully), 'Accessibility Section' (Response Is Required. To avoid delays in processing, please read all instructions carefully. What is IT Accessibility? - East Carolina University is committed to providing accessible technology and educational resources. For compliance and purchasing, ECU follows the Section 508 Standards - Software Applications and Operating Systems.), and 'ADA Compliance' (Line Item Information, Additional Line Items). A callout box labeled '25.' points to the 'ADA Compliance' section in the sidebar and the 'Accessibility Section' in the main content area.

25. The **ADA Compliance** portion of this form has been triggered by answers provided in the **Questions** portion of your form. A link with further details of **Section 508 Standards** has been provided here.

The screenshot shows the 'Section 508 compliance and accessibility' section of the form. It includes a sidebar with navigation options and a main content area with four numbered options. A callout box labeled '26.' points to the first option, '26.' points to the second option, '27.' points to the third option, and '28.' points to the fourth option. The options are: 1. There is a VPAT or vendor affirmation that demonstrates how the software meets Section 508 requirements (Visit VPAT Explained for more information). 2. The software qualifies for one of the following exceptions: Back Office, Technical and Programmatic Standards, or Assistive Technology (visit IT Purchasing - Accessibility Hardware Exemptions and Software Exceptions for more information). 3. The software qualifies for a Commercially Unavailable exception or Fundamental Alteration (these exceptions are rare - visit IT Purchasing - Accessibility Hardware Exemptions and Software Exceptions for more information), or the software does not meet Section 508 requirements. 4. If you are not sure, need assistance, or the software you are purchasing will be used Enterprise-wide, we recommend you consult with the IT Accessibility Consultant. By making this selection, an IT Accessibility Consultant will be notified to contact you to assist with the creation of an Equally Effective Alternative Access Plan.

26. A brief description of **Voluntary Product Accessibility Templates (VPATs)** with links containing more details have been provided.

27. This link provides details regarding requested software that may have exceptions from the VPAT requirement.

28. Choosing options 3 or 4 will result in a request for an **IT Accessibility Consultant's** assistance.

PROCARD TECHNOLOGY REQUEST FORM

Last Updated on: 7/17/2020

The screenshot shows the 'PROCARD TECHNOLOGY REQUEST FORM' interface. At the top, it says 'ECU MATERIALS MANAGEMENT' and 'Supplier Profile'. Below that, there's a search bar and a currency indicator '0.00 USD'. The main content area is titled 'Select one option that applies to your purchase: *'. There are five radio button options. Option 1 is selected. Below the options is an 'Important Note' section with a link to a PDF. Underneath is an 'ADA Compliance' section. At the bottom of the form, there is a 'No File Attached' message and an 'Upload' button. A yellow 'Save Progress' button is also visible.

29.

30.

29. For this example, we will select option 1. This will require a VPAT to be uploaded to the ProCard Technology Request form. **Note:** VPAT documents are provided by the supplier. A procedure to create this document from a supplier's website is provided using Chrome browser.
30. Once the VPAT document is obtained, upload the file from the supplier by clicking the **Upload** button.

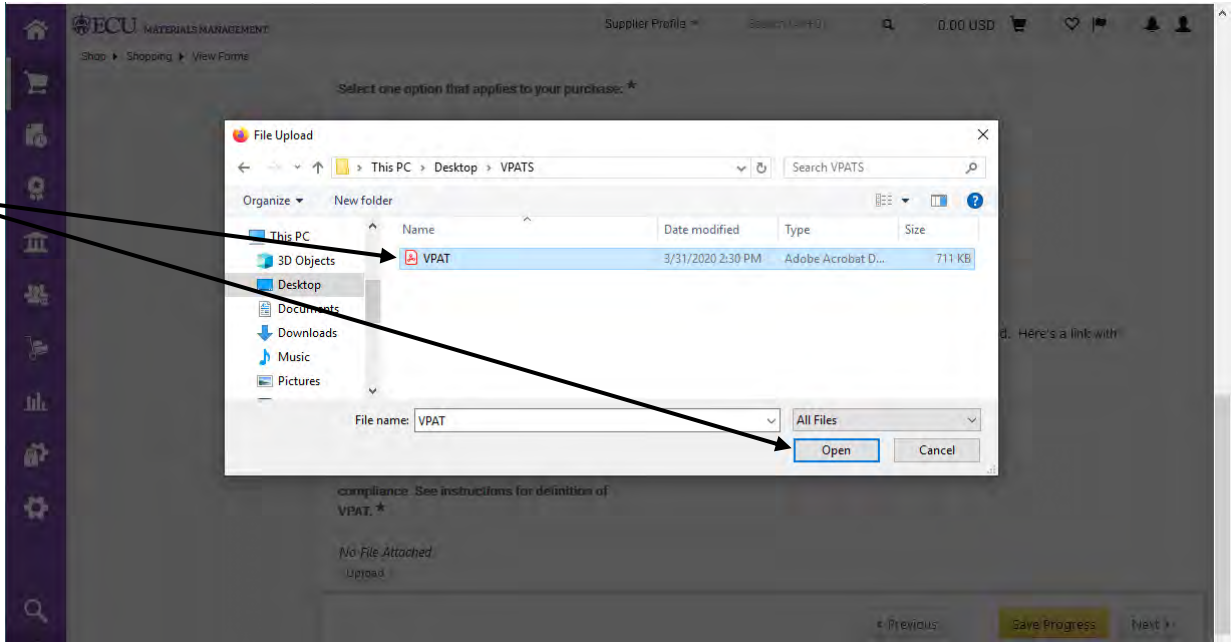
This screenshot shows the same form as above, but with an 'Upload' dialog box open in the foreground. The dialog box has a title bar 'Upload' and a close button. It contains two fields: 'Title *' with the value 'VPAT Sample' and 'File *' with a 'Browse...' button and the text 'No file selected. Maximum upload file size: 25.0 MB'. There are 'Save Changes' and 'Close' buttons at the bottom of the dialog. The background form is dimmed.

31.

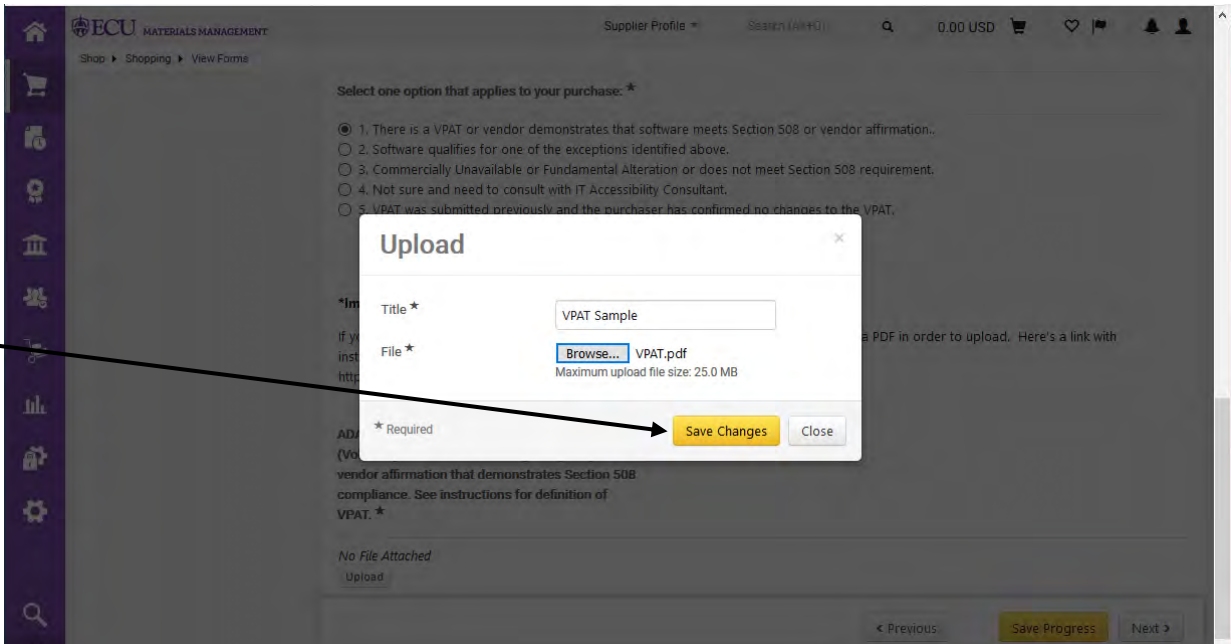
31. Name your upload file appropriately and click Browse to find your file.

PROCARD TECHNOLOGY REQUEST FORM

Last Updated on: 7/17/2020



32. Browse to, select the file, and click **Open** button.



33. Click **Save Changes** to upload the file.

PROCARD TECHNOLOGY REQUEST FORM

Last Updated on: 7/17/2020

ECU MATERIALS MANAGEMENT

Supplier Profile Search (Alt+Q) 0.00 USD

Shop Shopping View Forms

Select one option that applies to your purchase: *

- 1. There is a VPAT or vendor demonstrates that software meets Section 508 or vendor affirmation..
- 2. Software qualifies for one of the exceptions identified above.
- 3. Commercially Unavailable or Fundamental Alteration or does not meet Section 508 requirement.
- 4. Not sure and need to consult with IT Accessibility Consultant.
- 5. VPAT was submitted previously and the purchaser has confirmed no changes to the VPAT.

***Important Note:**

If you have a URL to a VPAT, you will need to use Chrome browser to convert that URL to a PDF in order to upload. Here's a link with instructions on how to accomplish:
http://www.ecu.edu/cs-admin/purchasing/port/upload/Web_Page_to_PDF.pdf

ADA Compliance: Please provide the VPAT (Voluntary Product Accessibility Template) or vendor affirmation that demonstrates Section 508 compliance. See instructions for definition of VPAT. *

VPAT Sample
Upload

< Previous Save Progress Next >

34. The VPAT has been attached to your **ProCard Technology Request Form**. **Note:** For step-by-step instructions on selecting options 2 – 5, see the **Technology Request Form** procedure (steps 30 – 40).
35. For this example, we will proceed to entering **Line Item Information** by clicking **Next** button.

PROCARD TECHNOLOGY REQUEST FORM

Last Updated on: 7/17/2020

The screenshot displays the 'Form Fields - Line Item Information' section of the ProCard Technology Request Form. The form is for a request with Form Number 440554 and Purpose Procurement Request. The status is 'Incomplete'. The interface includes a sidebar with navigation options like 'Instructions', 'Details', 'Suppliers', 'Form Fields', 'Technology Type', 'Questions', 'ADA Compliance', 'Line Item Information', 'Additional Line Items', and 'Review and Submit'. The main content area shows 'Line Item Information' for Item 1, with fields for Unit Price (69.95 USD), Quantity (2.0000), Unit of Measure (EA - Each), Product Description (Acrobat Profession DC), and Catalog No. (345353566). A 'Save Progress' button is highlighted at the bottom right.

36.

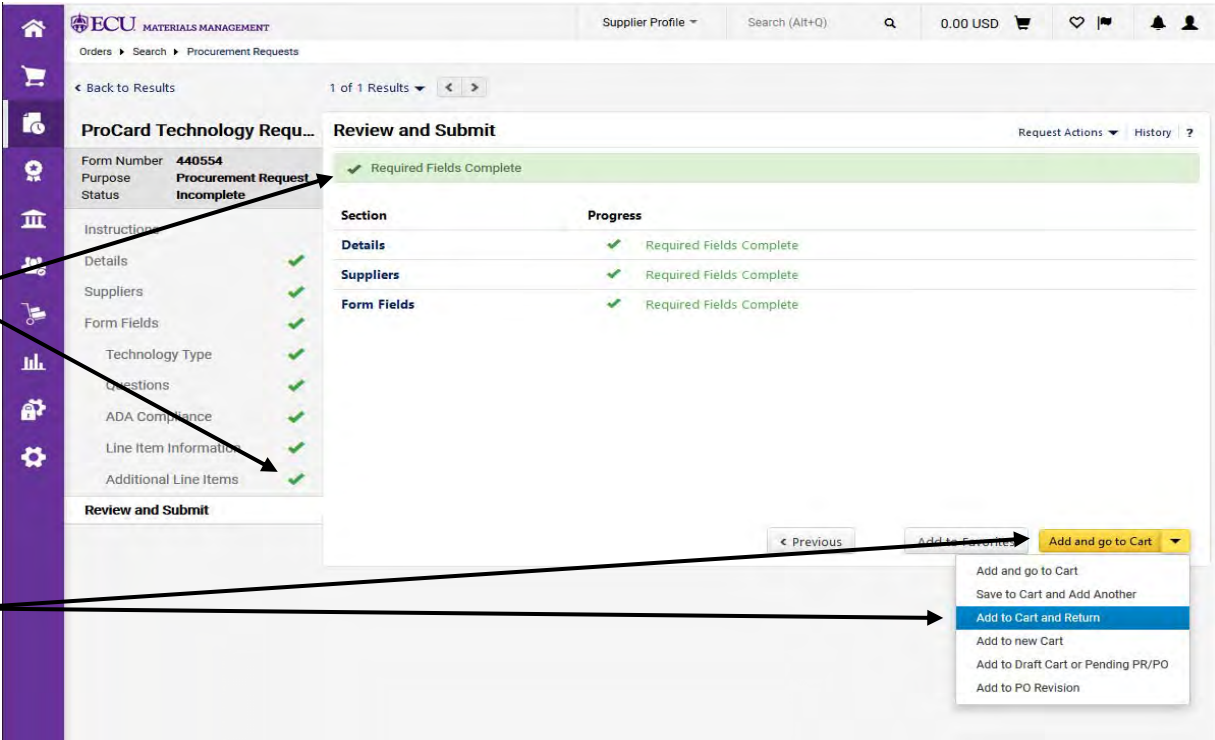
37.

38.

36. Follow the instructions to enter data for your requested software. Include as much detail as possible to avoid delays. Enter the **Unit Price** and **Quantity** for each line item.
Note: The total cost of Line Items will be reflected on your requisition. The quantity entry field will allow zero or a negative input. Do not leave zero or negative quantities in this field to avoid Banner order failure for invalid value.
37. Enter **Product Description** and **Catalog No.** as given on the quotation from supplier. **Note:** You may enter up to 10 items on each **ProCard Technology Request Form**. If your order requires more than 10 items an additional **ProCard Technology Request Form** can be added to your **shopping cart**.
38. If your order has between 5 – 10 items, click **Next**. Otherwise, you can click **Review and Submit** section of your form. For this example, we will click **Review and Submit** section.

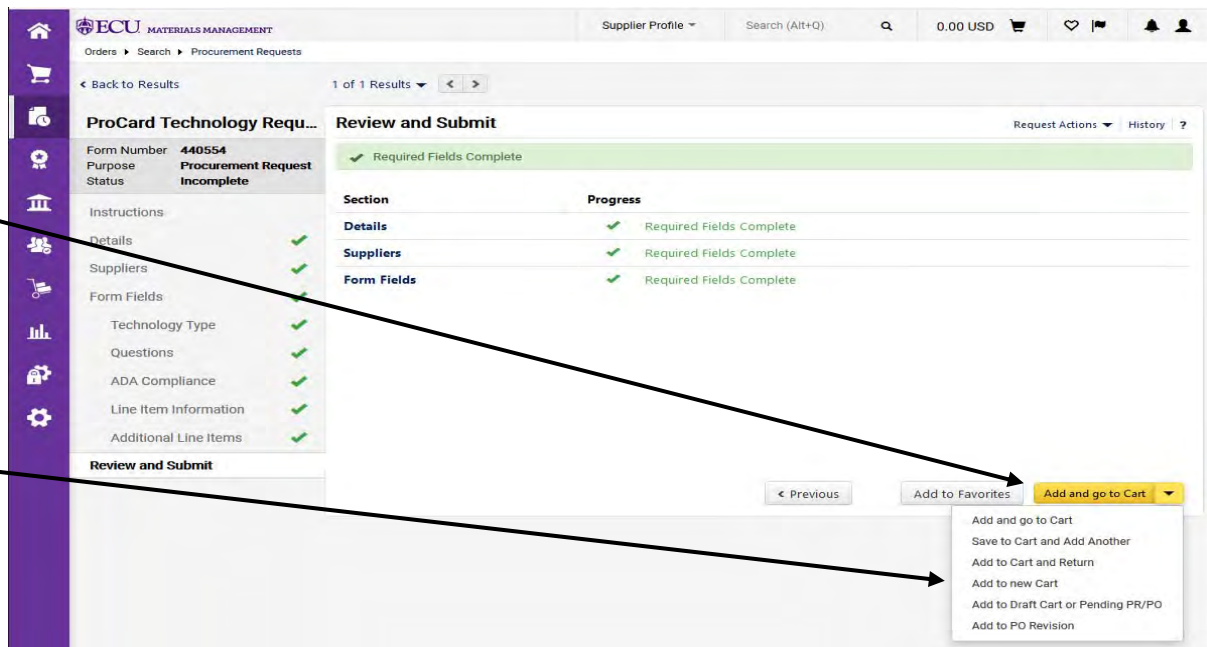
PROCARD TECHNOLOGY REQUEST FORM

Last Updated on: 7/17/2020



39. You may review each section of the ProCard Technology Request Form from the navigation pane. A Green Check will indicate the required fields have been satisfied.

40. If you have more than 10 items, you can click the drop-down box and select **Add to Cart and Return**. This will add your cart and bring you back to beginning of ProCard Technology Request form. On the last group of 10 items, you would click **Add and go to Cart**.



41. ProCard Technology Request Form is a “Do Not Mix” form. The **Add and go to Cart** action will create an error if there are items or other forms currently in your active cart. **Note:** Selecting the action **Add to new Cart** if your active cart has another form type or items from another supplier.

42. **Add and go to Cart** is the default option and we will click it to proceed with the purchase request.

PROCARD TECHNOLOGY REQUEST FORM

Last Updated on: 7/17/2020

Shop > My Carts and Orders > Open My Active Shopping Cart > Cart - 3015082 - Draft Requisition

Continue Shopping
1 Item(s) for a total of 0.00 USD
Proceed to Checkout

Add Non-Catalog Item Save

Priority Normal Business Purpose / Note to Approvers add note... Backup Required
Prepared by Susan Ball State Exempt Classroom Instruction Special Instructions None
Prepared for Susan Ball Select a different user... Notes to Suppliers add note...
Cart Name 2020-07-17 balls 02 Select from profile values... Select from all values...

Supplier / Line Item Details ?
Show line details For selected line items Add to Favorites Go

ECU Materials Management more info...
PO 1
200 E. 13th St. Greenville, NC 27858-4353 US

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	<input type="checkbox"/>
ProCard Technology Request Form - 7/2020 more info...						<input type="checkbox"/>
1 Summarized form fields Procurement Request: ProCard Technology Request Form - 7/2020			0.00	1	0.00 USD	
Supplier subtotal					0.00	USD
Subtotal					0.00	
Shipping					0.00	
Handling					0.00	
Total					0.00	USD

Save Proceed to Checkout

44.

43.

43. Your **ProCard Technology Request Form** has now been added to a cart and is indicated by the **Form Name** and **Form Image** icon.
44. **Note:** You can now view the future Requisition # before you submit the cart. Now if you have issues with a draft cart, you can call Materials Management with the future Requisition # for assistance.

Important Note: If your software request did not require ADA Accessibility Review, you will receive a PORT comment from ITCS on your approval to proceed with purchase. If your software request requires ADA Accessibility Review, an IT Accessibility Consultant may have additional questions for your request. Once the review is completed/approve, the IT Accessibility Consultant will email your approval to proceed with purchase.

45. See the Edit Cart Header procedure to continue the review process.

SHOPPING CART – SPECIAL ORDERS FORM

Last Updated on: 4/3/2020

The screenshot shows the ECU Materials Management website. The top navigation bar includes the ECU logo, 'MATERIALS MANAGEMENT', and a search bar with '3,574.90 USD' and a shopping cart icon. Below the search bar is a 'Shop' dropdown menu set to 'Everything' and a 'Go' button. The main content area is divided into several sections:

- NEW AMAZON PUNCH-OUT CATALOG:** A notice about the availability of the Amazon Punch-out catalog in PORT.
- IMPORTANT:** A list of key policies, including ProCard as the only payment method, a \$5,000 transaction limit, and the application of Amazon Business account rules.
- TSM - Banner ID Information:** Instructions on how to verify Banner IDs and search for suppliers.
- Contact ECU Supplier Management:** Contact information for supplier management.
- New Contract Information:** Links to customer guidelines for Shred-it Service and Kingston Refrigeration.
- Materials Management Forms:** A list of forms including State Term Contracts, Materials Management Web Page, Basic Purchasing Procedures, Guide to Materials Management, Promotional Items, and Contract Delegation of Authority.
- ECU Student Stores Catalog:** Information on how to search for Apple products in the Student Stores.
- ECU Catalogs:** A grid of supplier logos including ECU Medical Supplies, ECU Student Stores, Adobe Software, and Candidate, Research Participant.
- ProCard ONLY Suppliers for orders < \$5,000:** A grid of supplier logos including Amazon, CDWG, Fisher Scientific, Miltex, GrayConnect, Life, Office Depot, Staples, VWR International, ACR, Fastenal, and Grainger.
- Computer Supplies:** A grid of supplier logos including Apple, Dell, and Lenovo.
- Scientific / Medical Supplies:** A grid of supplier logos including Henschel Dental.
- Forms:** A grid of form logos including ECU Change Order Request, ECU Medical Supplies Special Order, ECU Ship Code Maintenance, ECU Technology Request, and ECU ProCard Technology Request.

A red box with the number '1.' is positioned to the left of the 'Forms' section, with an arrow pointing to the 'Medical Supplies Special Order' form.

1. Click on the appropriate sticker within the **Forms** showcase for **Medical Supplies Special Orders**.
Note: These forms are used for non-inventory items only.

SHOPPING CART – SPECIAL ORDERS FORM

Last Updated on: 4/3/2020

Medical Supplies Special Orders - Mozilla Firefox

https://usertest.sciquest.com/apps/Router/FavoritesFormEdit?&FavoriteProductId=225902&wantReloadOnC 90%

Medical Supplies Special Orders Available Actions: Add and go to Cart Go Close

Supplier Info

Supplier: ECU Medical Storeroom more info...

Fulfillment Address: Medical Supplies: (preferred)
600 Moye Blvd
Brody Som Gw-56
Greenville, NC 27834 US

Currency: USD

Distribution

The system will distribute purchase orders using the method(s) indicated below:

Email (HTML Body): boulineauc@mail.ecu.edu

Manual

General Info

Non-Configurable Fields

General Info Instructions: **This form is for non-inventory items only.** Use this form to enter medical info. Note that if shipping applies, you will need to enter on a separate line item. Special orders can take up to 10 days to process, depending on the item.

Form Type: Medical Supplies Special Orders

Catalog No.: 4567644

Product Description: 3M n95 Particulate Respirator
225 characters remaining expand | clear

Quantity: 4

UOM: EA - Each

Estimated Price: 29.95

2. A new window pops up to display the **Medical Supplies Special Order** form.
3. Enter the appropriate information for the following fields: **Catalog #, Product Description, Quantity, Unit of Measure (UOM), and Unit Price.** **Note:** If you do not have a Catalog # for the item, you enter either N/A or a descriptive term for the item
4. Click on the **Go** button to add the item to an active cart.

ECU MATERIALS MANAGEMENT

Shop > My Carts and Orders > Open My Active Shopping Cart > Cart - 2938670 - Draft Requisition

119.80 USD

Continue Shopping

Almost ready to go! The list below needs to be addressed before the cart can be submitted.

- Required field: State Exempt

Shopping Cart for Bridget Brown 4 Item(s) for a total of 119.80 USD

Proceed to Checkout

Save

Priority: Normal

Prepared by: Bridget Brown

Prepared for: Bridget Brown

Cart Name: 2020-04-02 brownb 06

Business Purpose / Note to Approvers: State Exempt

Backup Required:

Special Instructions: None

Notes to Suppliers:

Supplier / Line Item Details

Show line details For selected line items Add to Favorites Go

ECU Medical Storeroom more info...

Medical Supplies
600 Moye Blvd, Brody Som Gw-56, Greenville, NC 27834 US

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 3M n95 Particulate Respirator more info...	4567644	EA	29.95	4 EA	119.80 USD
Supplier subtotal					119.80 USD
Subtotal					119.80
Shipping					0.00
Handling					0.00
Total					119.80 USD

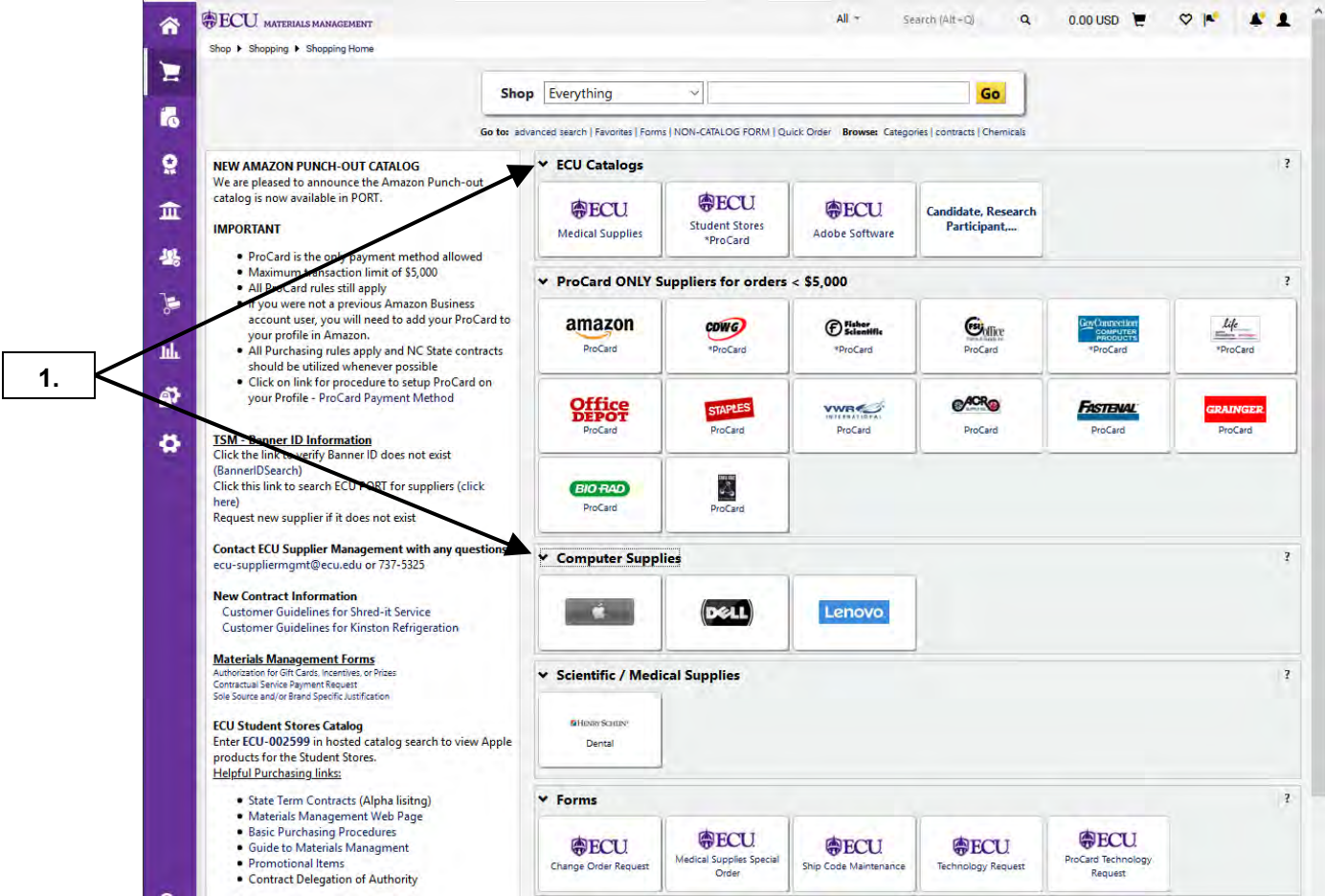
Save

Proceed to Checkout

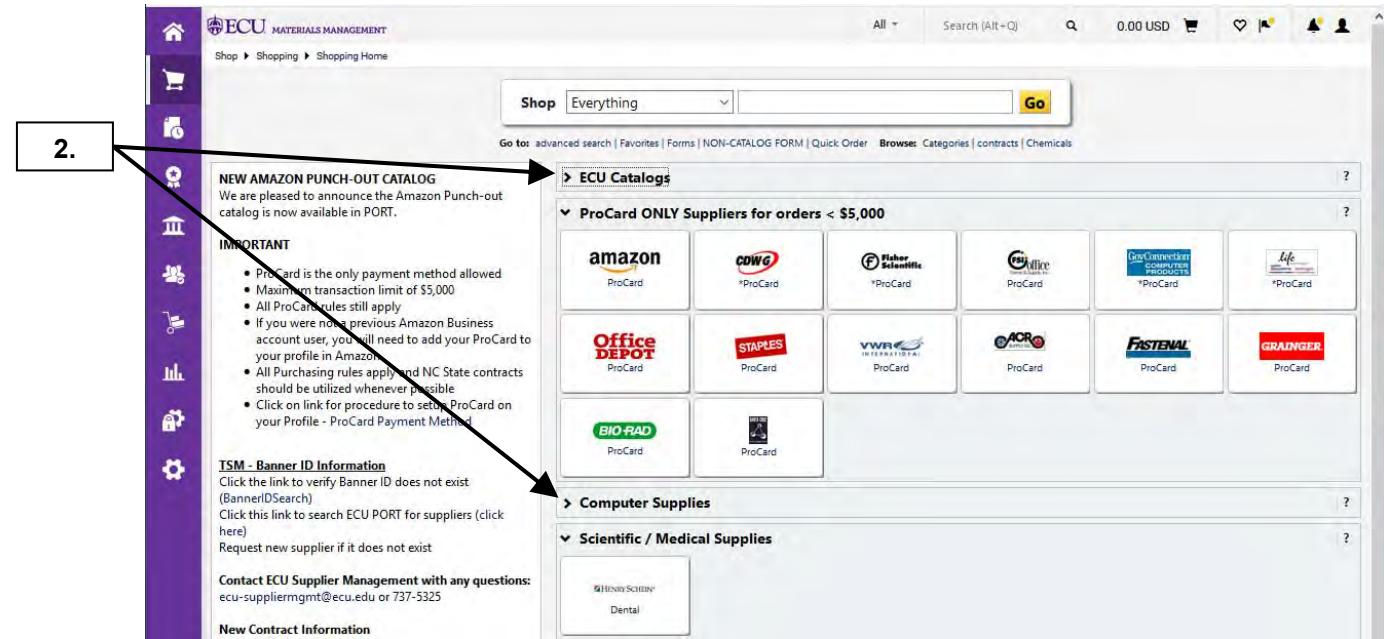
5. This brings you to **Shopping Cart** edit section. See the **Edit Cart Header** procedure to continue the review process.

COLLAPSE PRODUCT SHOWCASE

Last Updated on: 4/03/2020



1. To collapse a showcase, click on “V” symbol next to desired showcase.



2. Notice that ECU Catalogs and Scientific / Medical Suppliers showcases collapsed.

COLLAPSE PRODUCT SHOWCASE

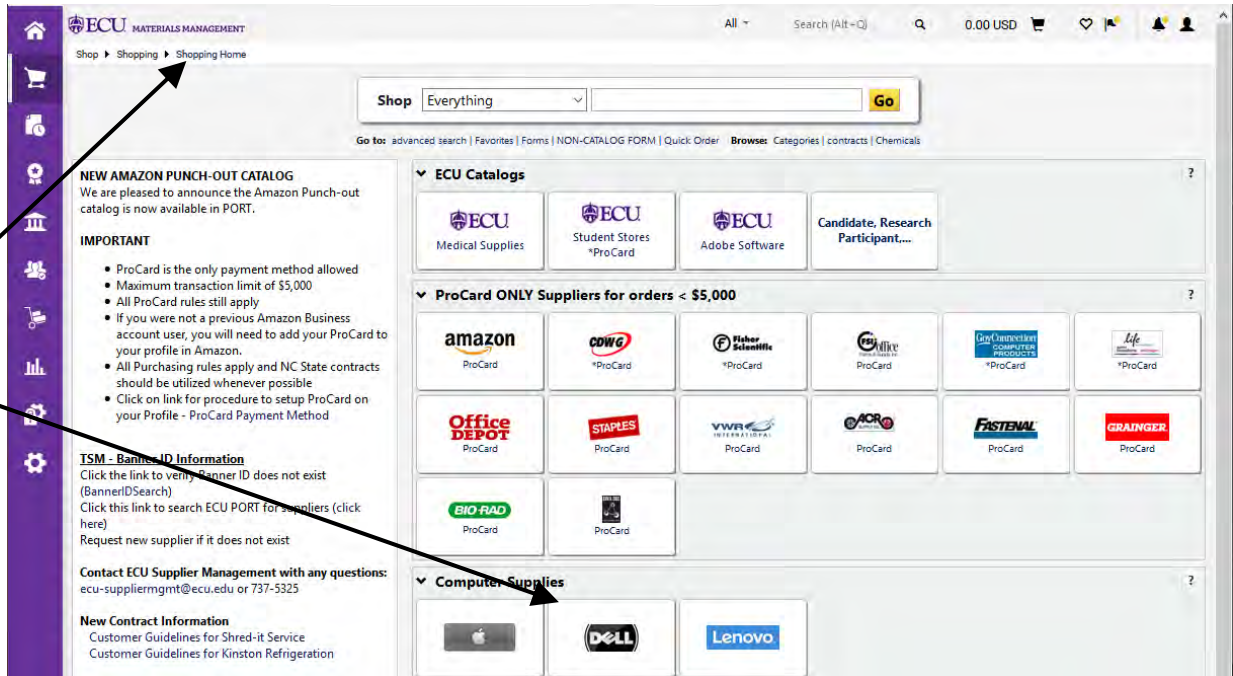
Last Updated on: 4/03/2020

The screenshot shows the ECU Materials Management website interface. On the left is a purple navigation sidebar with icons. The main content area is titled 'NEW AMAZON PUNCH-OUT CATALOG' and includes an 'IMPORTANT' section with bullet points about ProCard usage. Below this are sections for 'TSM - Banner ID Information', 'Contact ECU Supplier Management with any questions', 'New Contract Information', 'Materials Management Forms', and 'ECU Student Stores Catalog'. On the right, there are expandable sections: 'ECU Catalogs', 'ProCard ONLY Suppliers for orders < \$5,000' (listing suppliers like Amazon, Office Depot, Staples, etc.), 'Computer Supplies', 'Scientific / Medical Supplies', and 'Forms'. Three callout boxes are present: '5.' points to the ECU logo in the top left; '4.' points to the right-pointing arrow next to the 'ECU Catalogs' section header; '3.' points to the right-pointing arrow next to the 'Forms' section header.

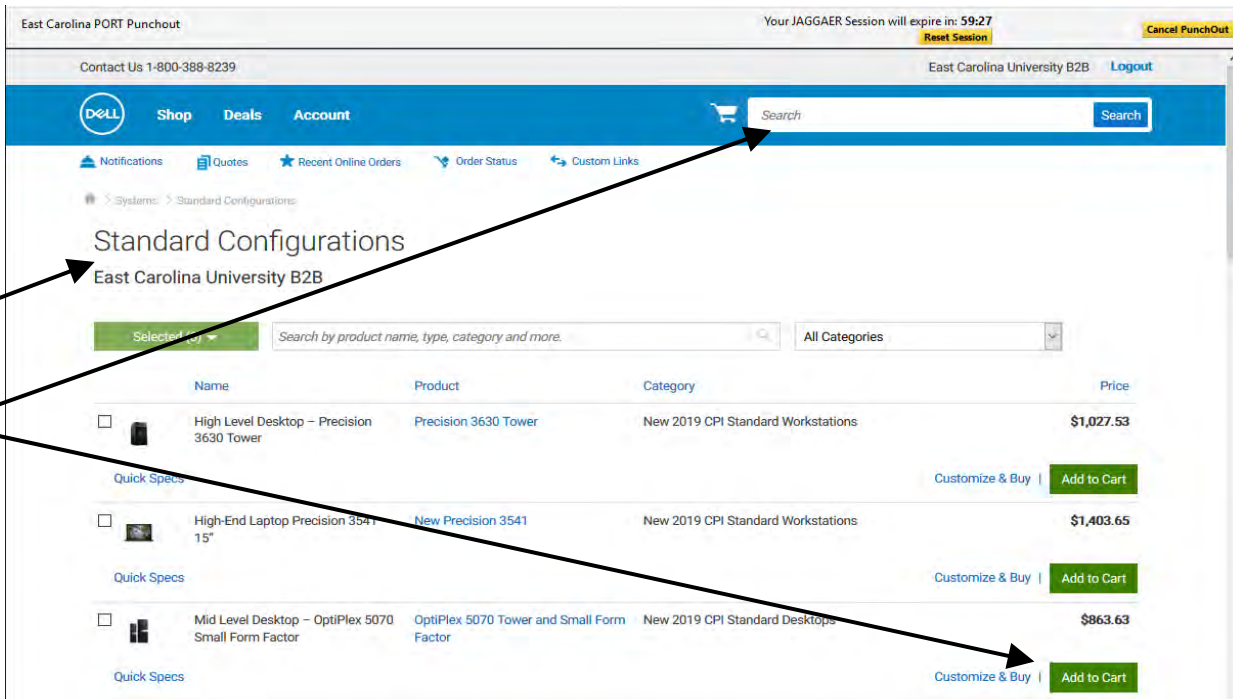
- 3. Notice that more showcased are now visible without scrolling down page.
- 4. If you need to open a collapsed showcase, just click on “>” symbol for desired showcase
- 5. This completes the steps for this procedure. Click on **ECU** icon to return to home page.

SHOPPING CART – PUNCHOUT CATALOG

Last Updated on: 4/03/2020



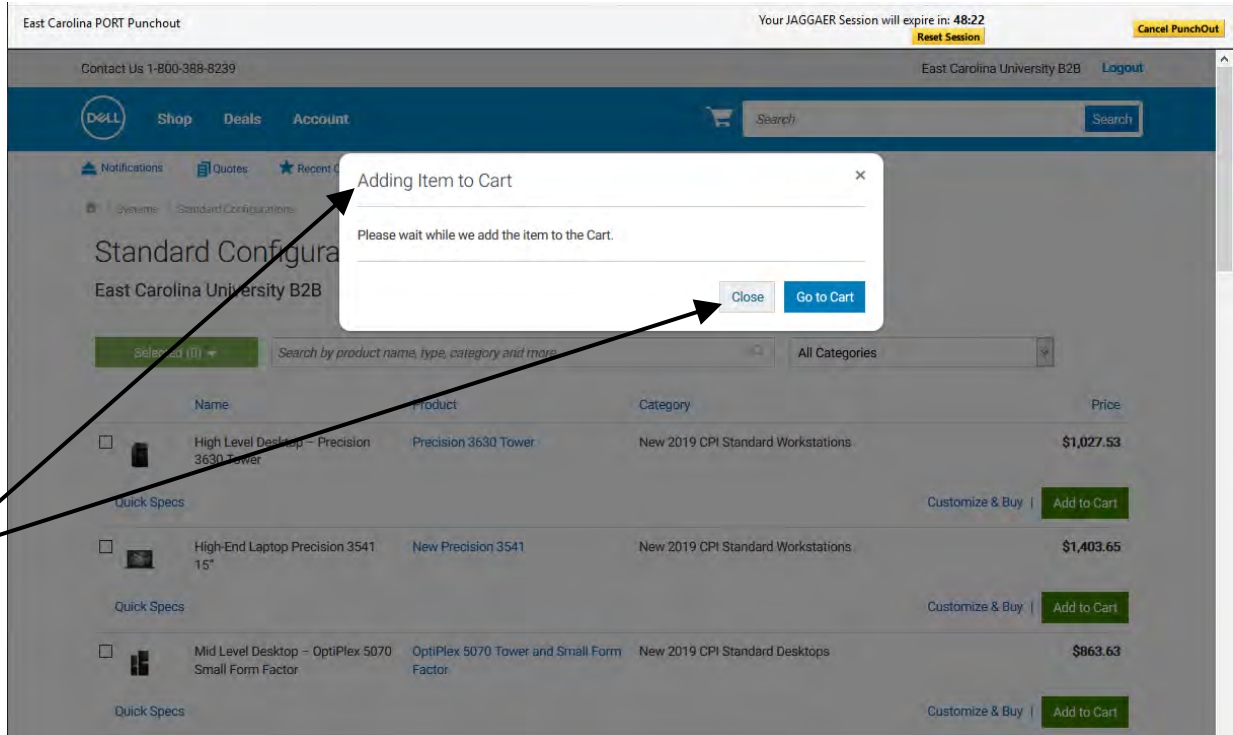
1. Ensure that you are on the **Shopping Home** page.
2. Click on **Dell** sticker in the **Computer Supplies** showcase. **Note:** A **Punch-out Catalog** allows you to shop directly from a website created and maintained by the Supplier. Creating carts from one of these types of suppliers will automatically populate a new **PORT** shopping cart once it has been submitted. Each Punch-out Supplier will have a different shopping experience.



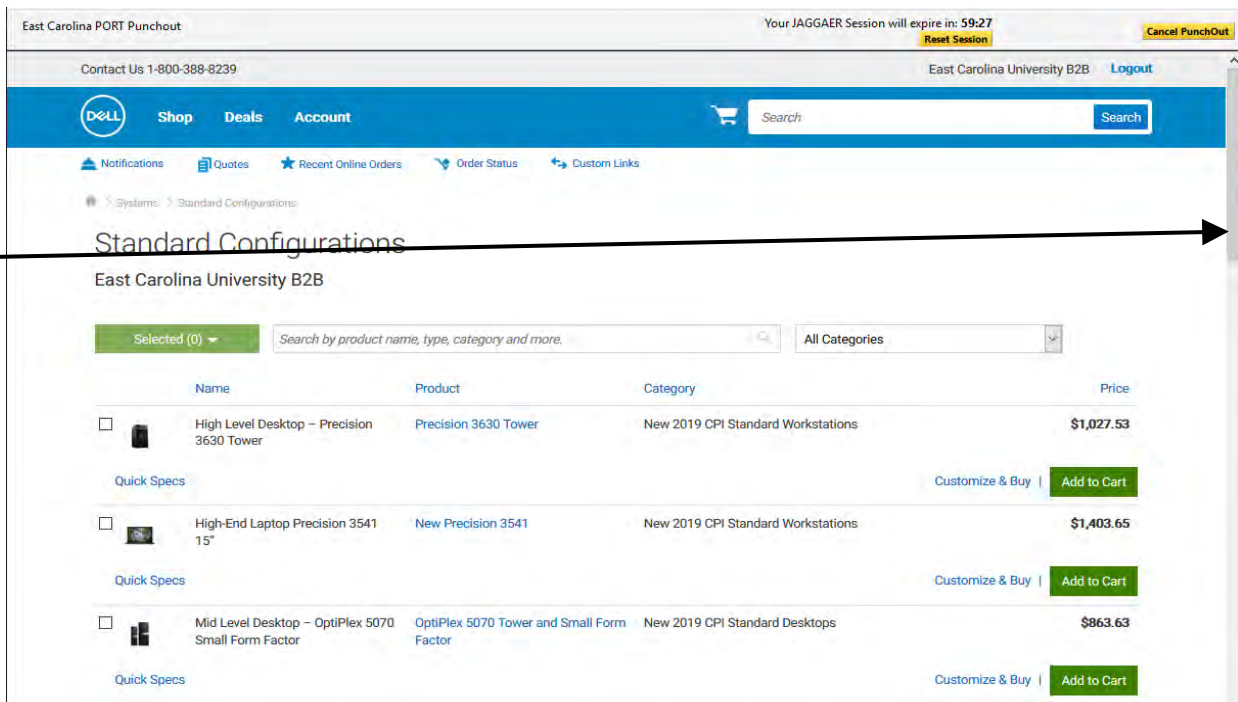
3. The home page brings you to the **Standard Configurations** for computers with ECU image. **Important Note:** You do not have to complete a Technology Request Form for Dell or Lenovo standard configuration computers with ECU image.
4. For the 1st item, we will add a Mid-Level OptiPlex 5070 to our shopping cart. You can also search for items of interest by entering description in search box at the top of browser.

SHOPPING CART – PUNCHOUT CATALOG

Last Updated on: 4/03/2020



5. Notice **Adding Item to Cart** pop-up window. In this example, we will add more items and will select **Close** button. If you only need this one item, you would click **Go to Cart** button to begin checkout.



6. Scroll down the page to view the remaining desktops, all-in-ones, laptops, tablets, and monitors.

SHOPPING CART – PUNCHOUT CATALOG

Last Updated on: 4/03/2020

East Carolina PORT Punchout Your JAGGAER Session will expire in: 49:07
[Reset Session](#) [Cancel PunchOut](#)

Selected (0) Search by product name, type, category and more. All Categories

	Name	Product	Category	Price
<input type="checkbox"/>	Mid-Level Laptop - Latitude 5400 (14")	Latitude 5400	New 2019 CPI Standard Notebooks	\$1,041.12
	Quick Specs		Customize & Buy Add to Cart	
<input type="checkbox"/>	Hybrid Laptop - XPS 2-in-1 (13")	New XPS 13 2-in-1	New 2019 CPI Standard Notebooks	\$1,874.03
	Quick Specs		Customize & Buy Add to Cart	
<input type="checkbox"/>	Tablet - 7200 2-in-1 (12")	Latitude 7200 2-in-1	New 2019 CPI Standard Notebooks	\$1,325.72
	Quick Specs		Customize & Buy Add to Cart	
<input type="checkbox"/>	Laptop - Latitude 3390 2in1 (14")	Latitude 3390 2-in-1	New 2019 CPI Standard Notebooks	\$1,009.67
	Quick Specs		Customize & Buy Add to Cart	
<input type="checkbox"/>	Laptop - Latitude 5424 Rugged	Latitude 5424 Rugged	New 2019 CPI Standard Notebooks	\$2,158.99
	Quick Specs		Customize & Buy Add to Cart	
<input type="checkbox"/>	22" Monitor - P2219H with 3 year warranty	P2219H Monitor	Monitors (Includes Approved Options)	\$143.28
	Quick Specs		Customize & Buy Add to Cart	

7. For the 2nd item, click on **Add to Cart** button for 22" monitor to go with the desktop computer.

East Carolina PORT Punchout Your JAGGAER Session will expire in: 44:14
[Reset Session](#) [Cancel PunchOut](#)

Selected (0) Search by product name, type, category and more. All Categories

	Name	Product	Category	Price
<input type="checkbox"/>	Mid-Level Laptop - Latitude 5400 (14")	Latitude 5400	New 2019 CPI Standard Notebooks	\$1,041.12
	Quick Specs		Customize & Buy Add to Cart	
<input type="checkbox"/>	Hybrid Laptop - XPS 2-in-1 (13")	New XPS 13 2-in-1	New 2019 CPI Standard Notebooks	\$1,874.03
	Quick Specs		Customize & Buy Add to Cart	
<input type="checkbox"/>	Tablet - 7200 2-in-1 (12")	Latitude 7200 2-in-1	New 2019 CPI Standard Notebooks	\$1,325.72
	Quick Specs		Customize & Buy Add to Cart	
<input type="checkbox"/>	Laptop - Latitude 3390 2in1 (14")	Latitude 3390 2-in-1	New 2019 CPI Standard Notebooks	\$1,009.67
	Quick Specs		Customize & Buy Add to Cart	

Adding Item to Cart

Please wait while we add the item to the Cart.

[Close](#) [Go to Cart](#)

8. Click **Close** button in the **Adding item to Cart** pop-up, since we will be adding one more item.

SHOPPING CART – PUNCHOUT CATALOG

Last Updated on: 4/03/2020

East Carolina PORT Punchout Your JAGGAER Session will expire in: 49:07
[Reset Session](#) [Cancel PunchOut](#)

Selected (0) Search by product name, type, category and more. All Categories

Name	Product	Category	Price
<input type="checkbox"/> Mid-Level Laptop - Latitude 5400 (14")	Latitude 5400	New 2019 CPI Standard Notebooks	\$1,041.12
Quick Specs Customize & Buy Add to Cart			
<input type="checkbox"/> Hybrid Laptop - XPS 2-in-1 (13")	New XPS 13 2-in-1	New 2019 CPI Standard Notebooks	\$1,874.03
Quick Specs Customize & Buy Add to Cart			
<input type="checkbox"/> Tablet - 7200 2-in-1 (12")	Latitude 7200 2-in-1	New 2019 CPI Standard Notebooks	\$1,325.72
Quick Specs Customize & Buy Add to Cart			
<input type="checkbox"/> Laptop - Latitude 3390 2in1 (14")	Latitude 3390 2-in-1	New 2019 CPI Standard Notebooks	\$1,009.67
Quick Specs Customize & Buy Add to Cart			
<input type="checkbox"/> Laptop - Latitude 5424 Rugged	Latitude 5424 Rugged	New 2019 CPI Standard Notebooks	\$2,158.99
Quick Specs Customize & Buy Add to Cart			
<input type="checkbox"/> 22" Monitor - P2219H with 3 year warranty	P2219H Monitor	Monitors (Includes Approved Options)	\$143.28
Quick Specs Customize & Buy Add to Cart			

9. For the 3rd item, click on **Add to Cart** button for Latitude 5400 laptop.

East Carolina PORT Punchout Your JAGGAER Session will expire in: 37:15
[Reset Session](#) [Cancel PunchOut](#)

Selected (0) Search by product name, type, category and more. All Categories

Adding Item to Cart ×

Please wait while we add the item to the Cart.

[Go to Cart](#)

Name	Product	Category	Price
<input type="checkbox"/> Mid-Level Laptop - Latitude (14")	Latitude 5400	New 2019 CPI Standard Notebooks	\$1,041.12
Quick Specs Customize & Buy Add to Cart			
<input type="checkbox"/> Hybrid Laptop - XPS 2-in-	New XPS 13 2-in-1	New 2019 CPI Standard Notebooks	\$1,874.03
Quick Specs Customize & Buy Add to Cart			
<input type="checkbox"/> Tablet - 7200 2-in-1 (12")	Latitude 7200 2-in-1	New 2019 CPI Standard Notebooks	\$1,325.72
Quick Specs Customize & Buy Add to Cart			
<input type="checkbox"/> Laptop - Latitude 3390 2in1 (14")	Latitude 3390 2-in-1	New 2019 CPI Standard Notebooks	\$1,009.67
Quick Specs Customize & Buy Add to Cart			
<input type="checkbox"/> Laptop - Latitude 5424 Rugged	Latitude 5424 Rugged	New 2019 CPI Standard Notebooks	\$2,158.99
Quick Specs Customize & Buy Add to Cart			

10. Click **Go to Cart** button in the **Adding item to Cart** pop-up window. This will be the final item for this punch-out order.

SHOPPING CART – PUNCHOUT CATALOG

Last Updated on: 4/03/2020

The screenshot shows a Dell shopping cart page. At the top, it says 'East Carolina PORT Punchout' and 'Your JAGGAER Session will expire in: 27:21'. There are buttons for 'Reset Session' and 'Cancel PunchOut'. The Dell logo is in the top left. The main heading is 'Cart'. Below it, there's a contract code and customer agreement number. A table lists items with columns for 'Items', 'Quantity', 'Unit Price', and 'Item total'. The first item is 'Mid Level Desktop - OptiPlex 5070 Small Form Factor' with a quantity of 1, unit price of \$1,522.41, and item total of \$1,522.41. The second item is '22" Monitor - P2219H with 3 year warranty' with a quantity of 1, unit price of \$209.99, and item total of \$209.99. On the right side, there's a summary box showing 'Savings \$1,968.07' and 'Subtotal (3) \$2,048.03'. Below the subtotal are buttons for 'Create Order Requisition', 'Save as eQuote', and 'Continue shopping'. There's also a 'Print' button and a 'Norton SECURED' logo. Three callout boxes are present: '11.' points to the quantity adjustment buttons for the first item, '12.' points to the bottom of the page, and '13.' points to the 'Create Order Requisition' button.

11. Within the shopping cart, you can adjust your quantities for each item. **Important Note:** Adding/removing items or adjusting quantity must be done in the punch-out catalog.
12. You may need to scroll down the page to see all the items in your cart.
13. Click **Create Order Requisition** button to continue to checkout.

SHOPPING CART – PUNCHOUT CATALOG

Last Updated on: 4/03/2020

East Carolina PORT Punchout Your JAGGAER Session will expire in: 17:36
Reset Session Cancel PunchOut

Checkout

Shipping and Payment Review Requisition Initiated

Review and confirm your order


Terms of sale
When you place your order, please be mindful that we will need people on site at your shipping destination to receive the product. If anything changes in your ability to receive the order prior to its delivery, please contact [Customer Care](#).

Unless you have a separate agreement with you and Dell that specifically applies to this order, by clicking "Order and Confirm Payment", you agree to Dell's [TERMS OF SALE](#) and will not export the order outside of the United States. [Change export preference.](#)

Order information

Delivery Method Estimated delivery date: **May 22, 2020** Change
no charge delivery

Items [Change](#)


Items	Quantity	Unit Price	Item total
 Mid Level Desktop – OptiPlex 5070 Small Form Factor Discounted unit price: \$863.63 Dell Contract Code: C000000009967 Estimated delivery date: May 22, 2020 Premier discount -\$658.78 Show full spec	1	\$1,522.41	\$1,522.41
			Item total: \$863.63

Savings \$1,968.07

Subtotal (3) **\$2,048.03**

Estimated delivery date: May 22, 2020

Submit Order Requisition


powered by VeriSign

Chat or Call

14. Click **Submit Order Requisition** button to add these items to a PORT shopping cart.

ECU MATERIALS MANAGEMENT All - Search (Alt+Q) 2,048.03 USD

Shop > My Carts and Orders > Open My Active Shopping Cart > Cart - 2938670 - Draft Requisition [Continue Shopping](#)

Shopping Cart

3 Item(s) for a total of **2,048.03 USD**

Cart was saved successfully [Proceed to Checkout](#)

[Save](#)

Priority: Normal Business Purpose / Note to Approvers: add note... Backup Required:

Prepared by: Bridget Brown State Exempt: Classroom Instruction Special Instructions: None

Prepared for: Bridget Brown Notes to Suppliers: add note...

Cart Name: 2020-04-02 brownb 06

Supplier Line Item Details

Supplier details: [Add to Favorites](#) [Go](#)

Dell Marketing LP [more info...](#)
 PO Purchase Order 1 [edit](#)
 One Dell Way, Bldg RR8, Round Rock, TX 78682-0384 US
 Free Shipping over 50.00 USD

The item(s) in this group was retrieved from the supplier's website. What does this mean?
 Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on: 4/3/2020 12:15:11 PM
 Line(s): 1, 2, 3

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 OptiPlex 5070 SFF;OptiPlex 5070 SFF XCTO more info...	210-ASDL	EA	863.63	1 EA	863.63 USD
2 Dell 22 Monitor - P2219H;Dell 22 Monitor - P2219H more info...	210-AQBK	EA	143.28	1 EA	143.28 USD
3 Base/Latitude 5400 XCTO Base more info...	210-ASJJ	EA	1,041.12	1 EA	1,041.12 USD
Supplier subtotal					2,048.03 USD
Subtotal					2,048.03
Shipping					0.00
Handling					0.00
Total					2,048.03 USD

[Save](#) [Proceed to Checkout](#)

15. This brings you to the **New Shopping Cart** edit section.

16. **Note:** You can now view the future **Requisition #** before you submit the cart. Now if you have issues with a draft cart, you can call Materials Management with the future **Requisition #** for assistance. See the **Edit Cart Header** procedure to continue the review process.

SHOPPING CART – EDIT & INSPECT – MODIFYING PUNCH-OUT CART

Last Updated on: 4/03/2020

ECU MATERIALS MANAGEMENT

Shop > My Carts and Orders > Open My Active Shopping Cart > Cart - 2938670 - Draft Requisition

Shopping Cart for Bridget Brown

3 Item(s) for a total of 2,048.03 USD

Save Proceed to Checkout

Cart was saved successfully

Priority: Normal Business Purpose / Note to Approvers: add note... Backup Required: Special Instructions: None

Prepared by: Bridget Brown State Exempt: Classroom Instruction

Cart Name: 2020-04-02 brownb 06

Supplier / Line Item Details

Dell Marketing LP

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 OptiPlex 5070 SFF;OptiPlex 5070 SFF XCTO	210-ASDL	EA	863.63	1	863.63 USD
2 Dell 22 Monitor - P2219H;Dell 22 Monitor - P2219H	210-AQBK	EA	143.28	1	143.28 USD
3 BaseLatitude 5400 XCTO Base	210-ASJJ	EA	1,041.12	1	1,041.12 USD

Supplier subtotal: 2,048.03 USD

Subtotal: 2,048.03

Shipping: 0.00

Handling: 0.00

Total: 2,048.03 USD

1. Click on the **MODIFY ITEMS** link to make changes to a punch-out catalog shopping cart. **Important Note:** All punch-out suppliers allow the Edit & Inspect feature for modifying shopping carts.

East Carolina PORT Punchout

Your JAGGAER Session will expire in: 59:30

PO View

Quote number: 1099478688538

Subtotal (3) : \$2,048.03 | Total :

Items	Quantity	Unit Price	Item total
Mid Level Desktop – OptiPlex 5070 Small Form Factor Discounted unit price: \$863.63 Dell Contract Code: C000000099967	1	\$1,522.41	\$1,522.41
22" Monitor – P2219H with 3 year warranty Discounted unit price: \$143.28 Dell Contract Code: C000000099967	1	\$209.99	\$209.99

Savings: \$1,968.07

Subtotal (3) \$2,048.03

Created: April 3, 2020

Expires: June 2, 2020

Created by: ecut

Status: Active

2. This is where you can modify the shopping cart with the following changes: removing items, changing quantity of items, and adding new items to your shopping cart.
3. For the first edit, we will change the quantity of the 1st item from 1 to 2 items by clicking on + sign next to quantity. Scroll down the page to make additional edits to the cart.

SHOPPING CART – EDIT & INSPECT – MODIFYING PUNCH-OUT CART

Last Updated on: 4/03/2020

East Carolina PORT Punchout Your JAGGAER Session will expire in: 54:45 [Reset Session](#) [Cancel PunchOut](#)

PO View Subtotal (4) : \$2,911.66 | Total :

Quote number: 1000478685638 [Save New eQuote](#) [Create Order Requisition](#) [Continue shopping](#)

Item	Quantity	Unit Price	Item total
<p>22" Monitor – P2219H with 3 year warranty Discounted unit price: \$143.28 Dell Contract Code: C000000009967 Configure Remove item</p> <p>Estimated Ship Date May 4, 2020</p> <p>Premier discount -\$66.71 Show full spec</p> <p>Item total: \$143.28</p>	1	\$209.99	\$209.99
<p>Mid-Level Laptop - Latitude 5400 (14") Discounted unit price: \$1,041.12 Dell Contract Code: C000000009967 Configure Remove item</p> <p>Estimated Ship Date Ships in 26 - 30 business days</p> <p>Premier discount -\$1,242.58 Show full spec</p> <p>Item total: \$1,041.12</p>	1	\$2,283.70	\$2,283.70

4.

5.

4. For the 2nd edit, we will increase the number of monitors by clicking on + sign next to quantity.
5. For the 3rd edit, we will remove the 3rd line item from the shopping cart by clicking **Remove item** link.

East Carolina PORT Punchout Your JAGGAER Session will expire in: 48:26 [Reset Session](#) [Cancel PunchOut](#)

PO View Subtotal (4) : \$2,013.82 | Total :

Quote number: 1000478685638 [Save New eQuote](#) [Create Order Requisition](#) [Continue shopping](#)

Items	Quantity	Unit Price	Item total
<p>Mid Level Desktop – OptiPlex 5070 Small Form Factor Discounted unit price: \$663.63 Dell Contract Code: C000000009967 Configure Remove item</p> <p>Estimated Ship Date Ships in 29 - 33 business days</p> <p>Premier discount -\$1,317.56 Show full spec</p> <p>Item total: \$1,727.26</p>	2	\$1,522.41	\$3,044.82
<p>22" Monitor – P2219H with 3 year warranty Discounted unit price: \$143.28 Dell Contract Code: C000000009967 Configure Remove item</p> <p>Estimated Ship Date May 4, 2020</p> <p>Premier discount -\$133.42 Show full spec</p> <p>Item total: \$286.56</p>	2	\$209.99	\$419.98

Savings \$1,450.98

Subtotal (4) \$2,013.82

Created April 3, 2020
Expires June 2, 2020
Created by ecut
Status Active

[Print](#) [Email](#)

generated by VeriSign

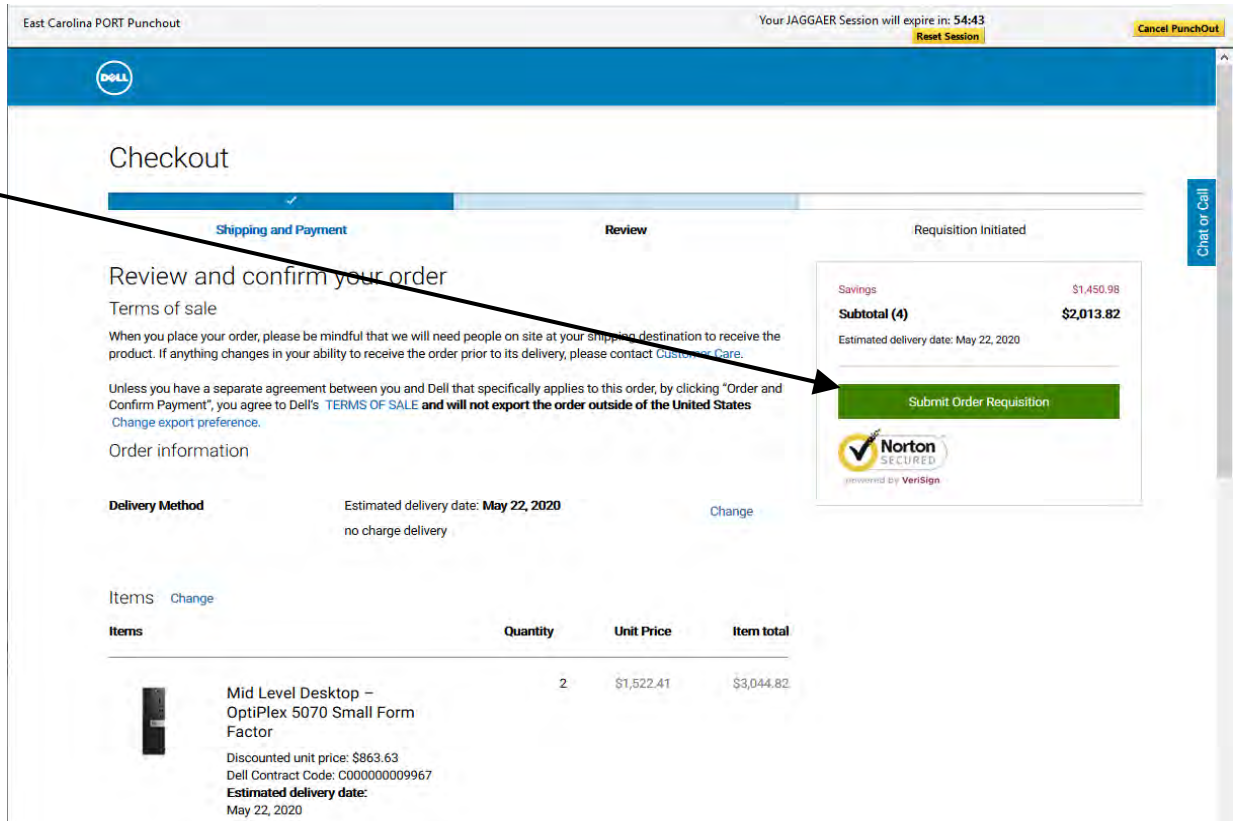
7.

6.

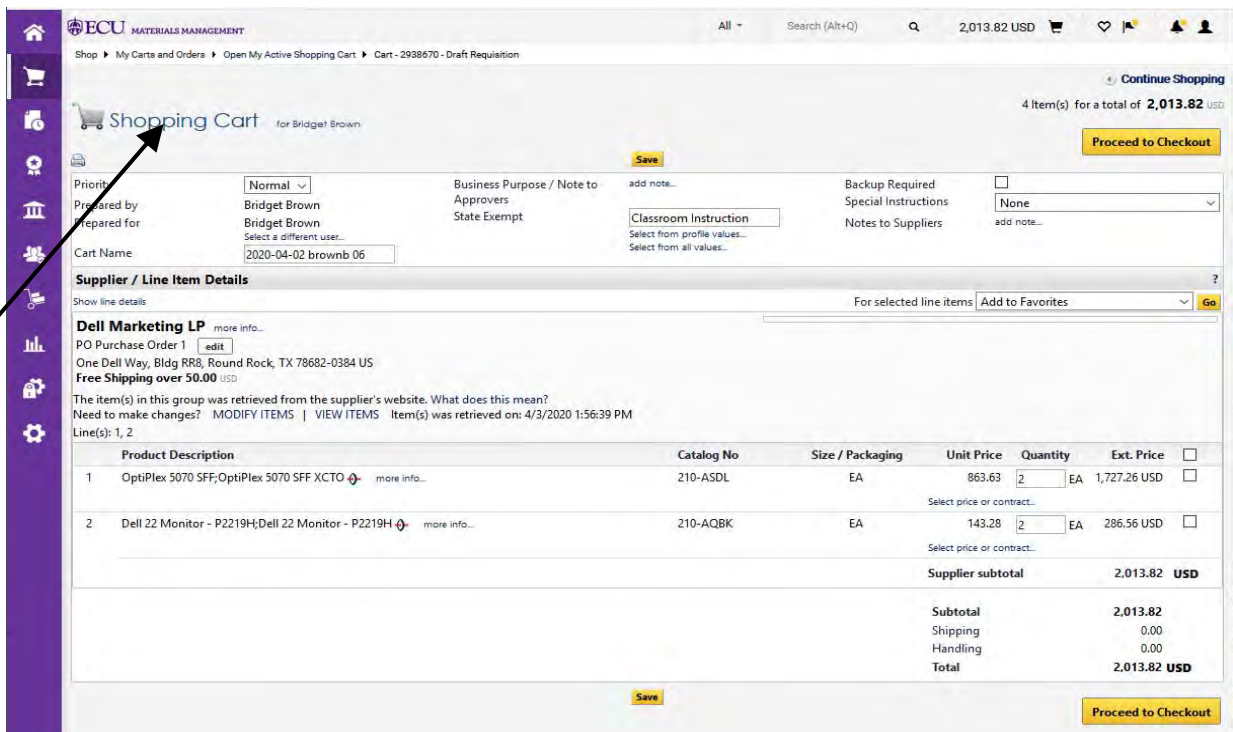
6. Note that 1st and 2nd item total price updated and 3rd item has been removed from the **Shopping Cart**.
7. This completes edits to the shopping cart. Click **Create Order Requisition** button.

SHOPPING CART – EDIT & INSPECT – MODIFYING PUNCH-OUT CART

Last Updated on: 4/03/2020



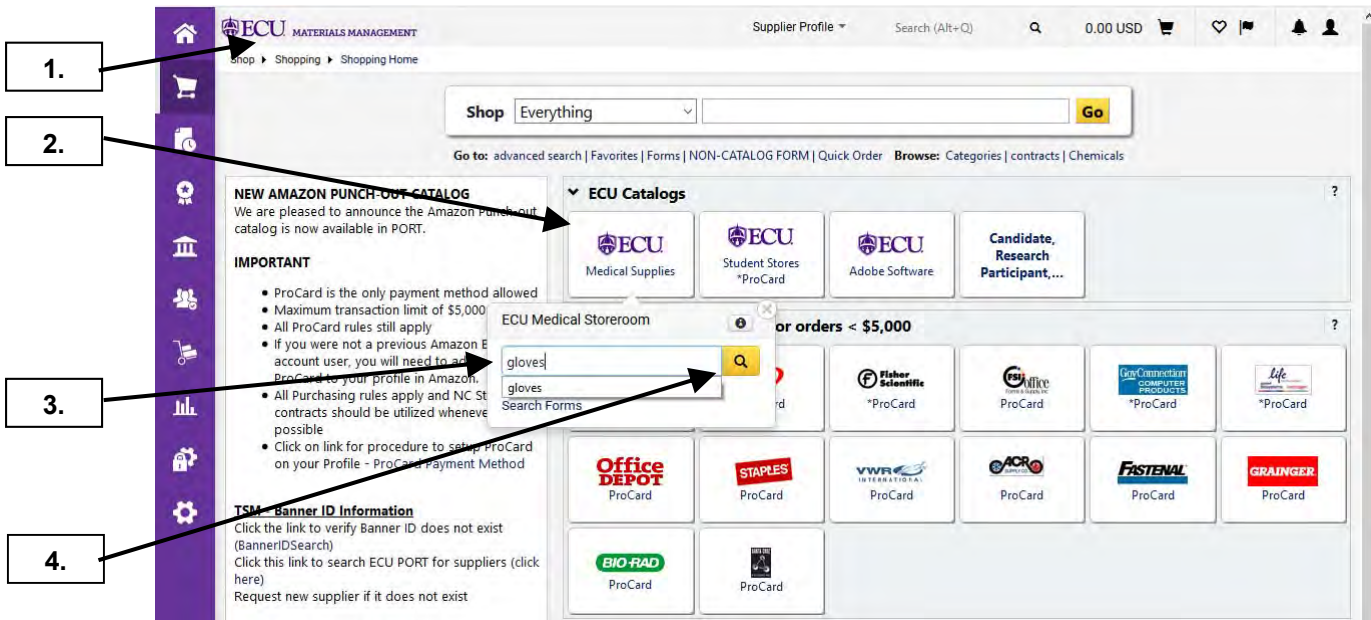
8. Confirm edits to shopping cart are complete and click **Submit Order Requisition** button to add these items to your PORT shopping cart.



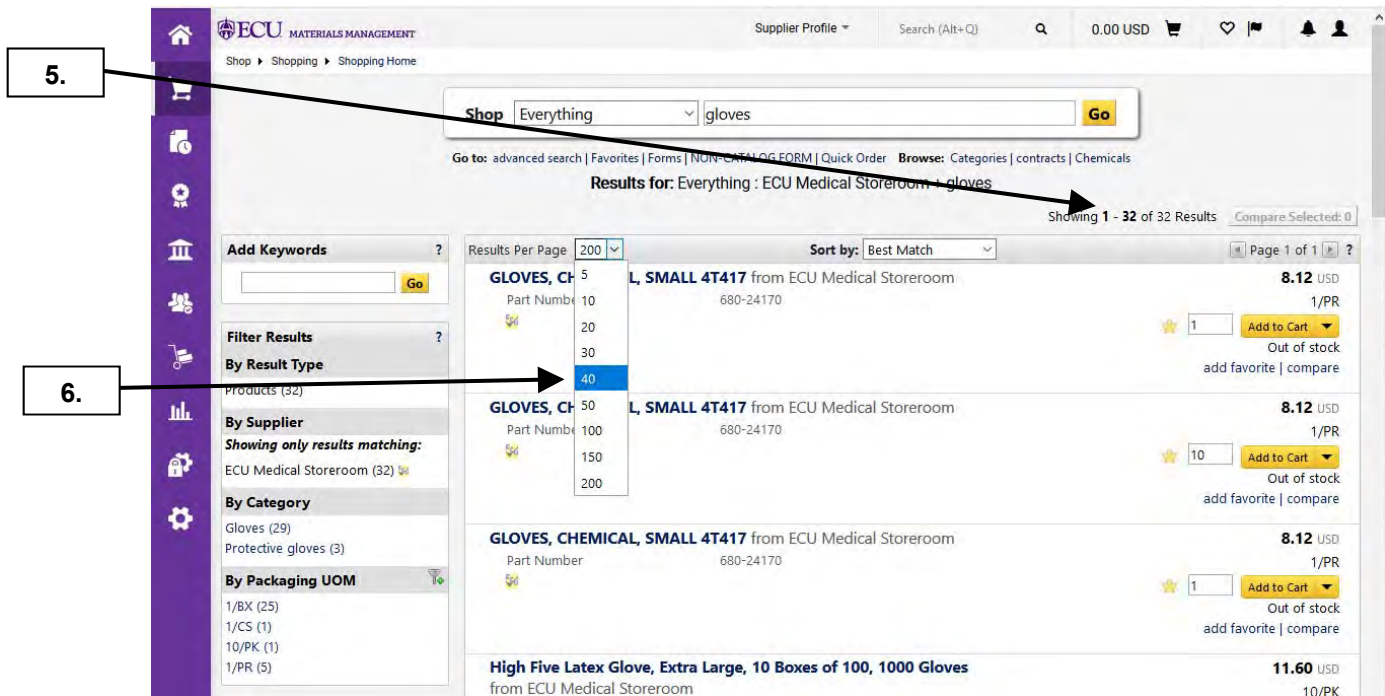
9. This brings you to **Shopping Cart** edit section. See the **Edit Cart Header** procedure to continue the review process.

SHOPPING CART – HOSTED STOREROOM CATALOG

Last Updated on: 4/15/2020



1. Ensure that you are on the **home/shop** tab.
2. Click on **ECU Medical Supplies** sticker.
3. Enter item description or catalog # in **Search** text box. For this example, we will use **gloves**.
4. Click **Search** button. **Note:** These steps will only display results for ECU Medical storeroom catalog.



5. Notice the number of **items found** from your search of **gloves** for **ECU Medical** storeroom. If the number of items found is not greater than the **Results per page**, you can proceed to step 7.
6. To see all the results on 1 page, click on the **Results per page** drop down box and choose a number higher than number of items found.

SHOPPING CART – HOSTED STOREROOM CATALOG

Last Updated on: 4/15/2020

The screenshot shows the ECU Materials Management shopping interface. At the top, there's a search bar with 'gloves' entered. Below it, the results are displayed for 'Everything : ECU Medical Storeroom + gloves'. The results list several items, including 'GLOVES, CHEMICAL, SMALL 4T417 from ECU Medical Storeroom' and 'High Five Latex Glove, Extra Large, 10 Boxes of 100, 1000 Gloves'. A box labeled '7.' points to the search bar, and a box labeled '8.' points to the 'Add to Cart' button of the third item.

7. Scroll down the page to find the appropriate gloves in this example.
8. Once you find the desired item, enter quantity needed and click on **Add to Cart** button. **Note:** You can see if the item is in stock or out of stock. You can still order out of stock items, they will automatically be placed on backorder until they are received by the storeroom.

The screenshot shows the ECU Materials Management shopping interface after adding items. The shopping cart total is now 40.60 USD. A box labeled '9.' points to the shopping cart icon in the top right corner.

9. Notice that your shopping cart has been updated with the items that were just added. If you only have 1 item for your requisition, click on the shopping cart and skip to step 19 on page 6.

SHOPPING CART – HOSTED STOREROOM CATALOG

Last Updated on: 4/15/2020

The screenshot shows the ECU Materials Management shopping cart interface. At the top, there is a search bar with 'Everything' selected and '040-21000' entered. A 'Go' button is to the right. Below the search bar, there are navigation links: 'Go to: advanced search | Favorites | Forms | NON-CATALOG FORM | Quick Order | Browse: Categories | contracts | Chemicals'. The search results are for 'Everything : ECU Medical Storeroom + gloves', showing 32 results. The first three results are 'GLOVES, CHEMICAL, SMALL 4T417 from ECU Medical Storeroom' with a price of 8.12 USD and 1/PR. Each result has a quantity input field (set to 1) and an 'Add to Cart' button. The third result has a quantity of 5. A '5 items added, view cart.' message is at the bottom right. On the left, there is a 'Filter Results' sidebar with options: 'By Result Type' (Products (32)), 'By Supplier' (ECU Medical Storeroom (32)), 'By Category' (Gloves (29), Protective gloves (3)), and 'By Packaging UOM' (1/BX (25), 1/CS (1), 10/PK (1), 1/PR (5)). A box labeled '10.' has arrows pointing to the search bar and the 'Go' button.

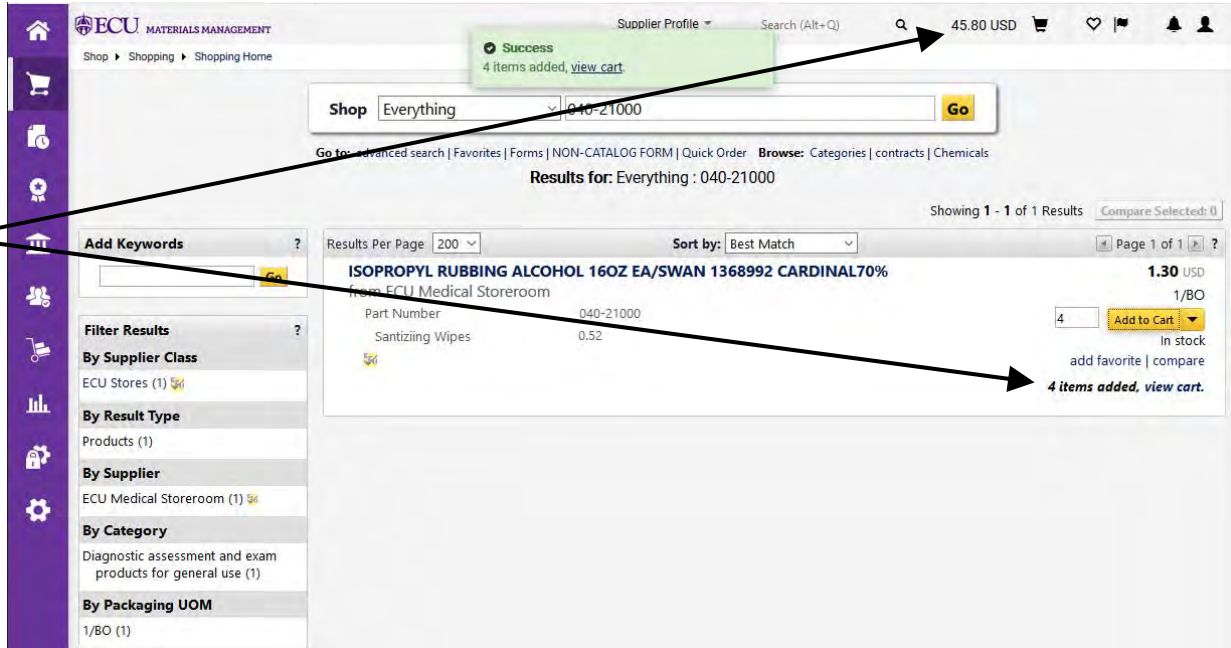
10. In this example, we will be adding 3 different items. For 2nd item enter the **Catalog #** for ECU Medical storeroom item and click **Go** button.

The screenshot shows the ECU Materials Management shopping cart interface. At the top, there is a search bar with 'Everything' selected and '040-21000' entered. A 'Go' button is to the right. Below the search bar, there are navigation links: 'Go to: advanced search | Favorites | Forms | NON-CATALOG FORM | Quick Order | Browse: Categories | contracts | Chemicals'. The search results are for 'Everything : 040-21000', showing 1 result. The result is 'ISOPROPYL RUBBING ALCOHOL 16OZ EA/SWAN 1368992 CARDINAL 70% from ECU Medical Storeroom' with a price of 1.30 USD and 1/BO. It has a quantity input field (set to 4) and an 'Add to Cart' button. The result is 'In stock'. On the left, there is a 'Filter Results' sidebar with options: 'By Supplier Class' (ECU Stores (1)), 'By Result Type' (Products (1)), 'By Supplier' (ECU Medical Storeroom (1)), 'By Category' (Diagnostic assessment and exam products for general use (1)), and 'By Packaging UOM' (1/BO (1)). A box labeled '11.' has arrows pointing to the quantity input field and the 'Add to Cart' button.

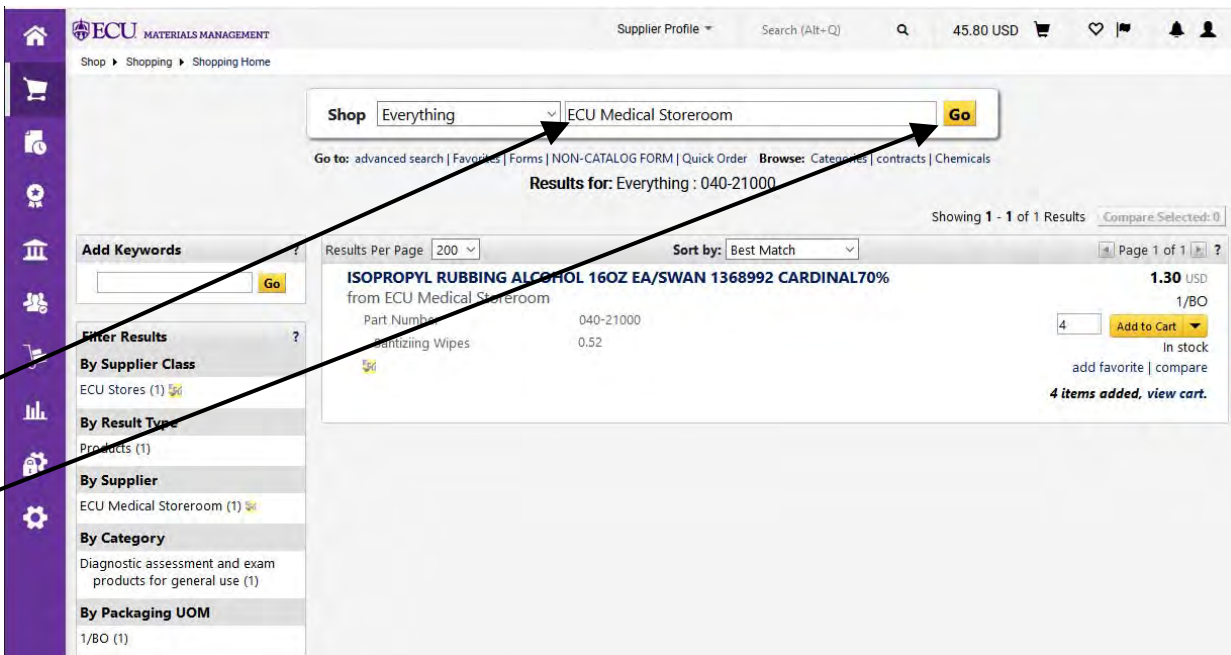
11. Enter quantity needed and click on **Add to Cart** button.

SHOPPING CART – HOSTED STOREROOM CATALOG

Last Updated on: 4/15/2020



12. Notice that your shopping cart has been updated with the items that were just added.



13. Enter **ECU Medical Storeroom** for the 3rd and final item. **Note:** The first item was found by searching **Product Description** of gloves for ECU Medical Storeroom, the 2nd item was found by searching a **Catalog #**, and the 3rd item will be found by searching ECU Medical Storeroom **Categories**.
14. Click on the **Go** button.

SHOPPING CART – HOSTED STOREROOM CATALOG

Last Updated on: 4/15/2020

The screenshot shows the ECU Materials Management shopping interface. At the top, there's a search bar with 'Everything' selected and 'ECU Medical Storeroom' entered. Below the search bar, there are navigation links like 'Go to: advanced search | Favorites | Forms | NON-CATALOG FORM | Quick Order | Browse: Categories | contracts | Chemicals'. The main content area displays search results for 'ECU Medical Storeroom' with 645 results. A sidebar on the left contains filter options: 'Add Keywords', 'Filter Results', 'By Supplier Class', 'By Result Type', 'By Product Flag', 'By Supplier', 'By Manufacturer', and 'By Category'. A callout box labeled '15.' points to a gear icon in the 'By Category' section of the sidebar.

15. Click on the **add filter** icon to see all the categories for ECU Medical Storeroom.

The screenshot shows the 'Filter By Category' pop-up window. It contains a list of categories with checkboxes. The category 'Bandages and dressings and related products (43)' is selected. At the bottom of the window, there are 'Filter' and 'Cancel' buttons. Callout boxes '16.' and '17.' point to the selected category and the 'Filter' button, respectively.

16. Within the **Filter by Category** pop-up window, click on the appropriate category for the item. We will use **Bandages and dressings and related products** filters for this example.

17. Click on the **Filter** button.

SHOPPING CART – HOSTED STOREROOM CATALOG

Last Updated on: 4/15/2020

18.

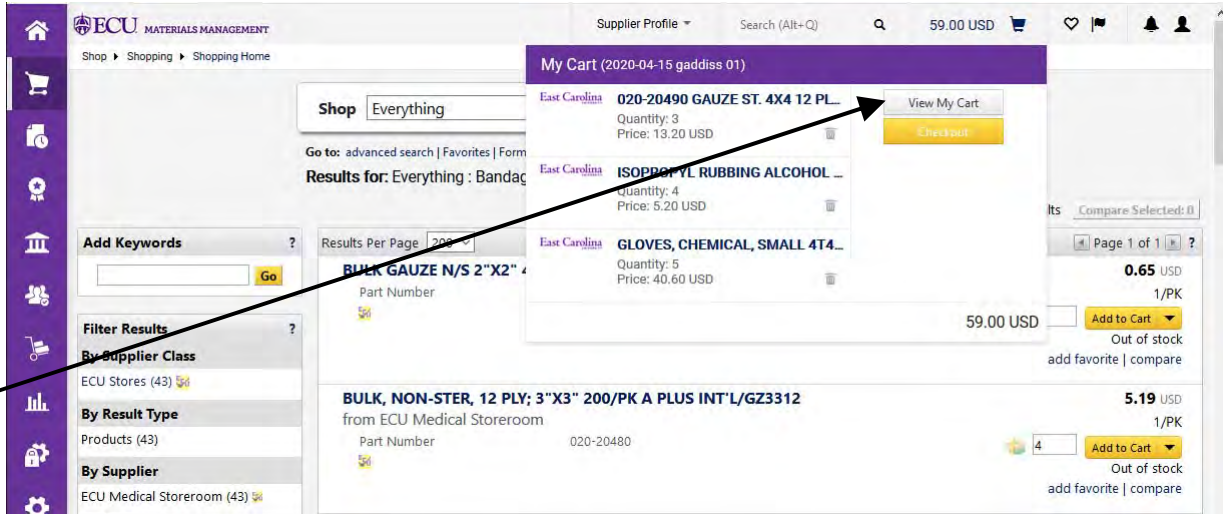
18. Enter quantity needed and click on **Add to Cart** button.

19.

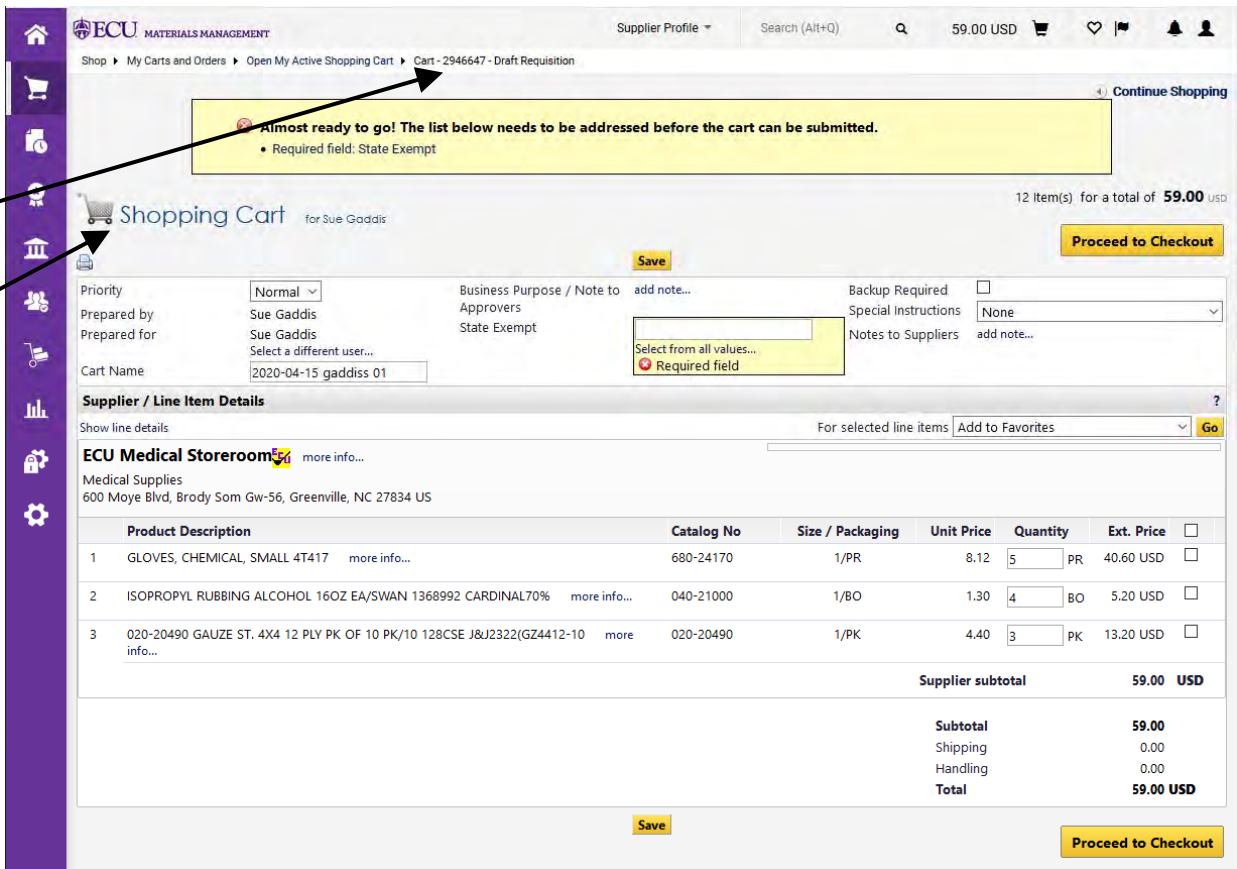
19. Notice that the item was added successfully. Click on your shopping cart after adding final item to the order.

SHOPPING CART – HOSTED STOREROOM CATALOG

Last Updated on: 4/15/2020



20. Click on **View My Cart** button.

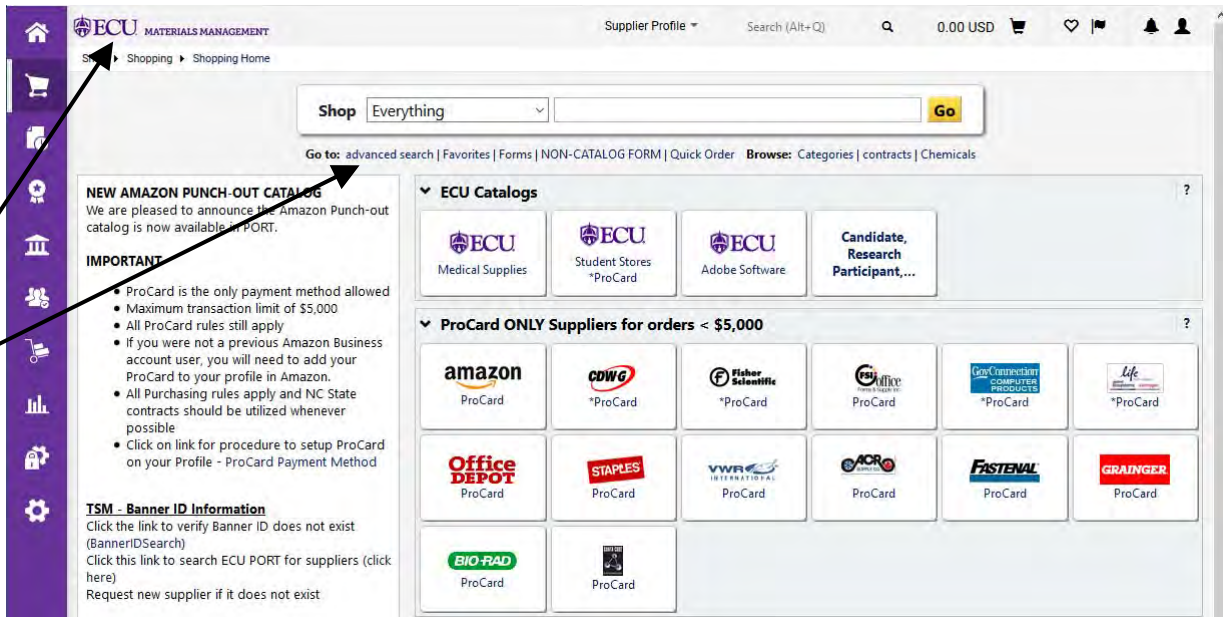


21. This completes the steps for shopping the Medical Storeroom's hosted catalog and brings you to the **Shopping Cart** edit section.

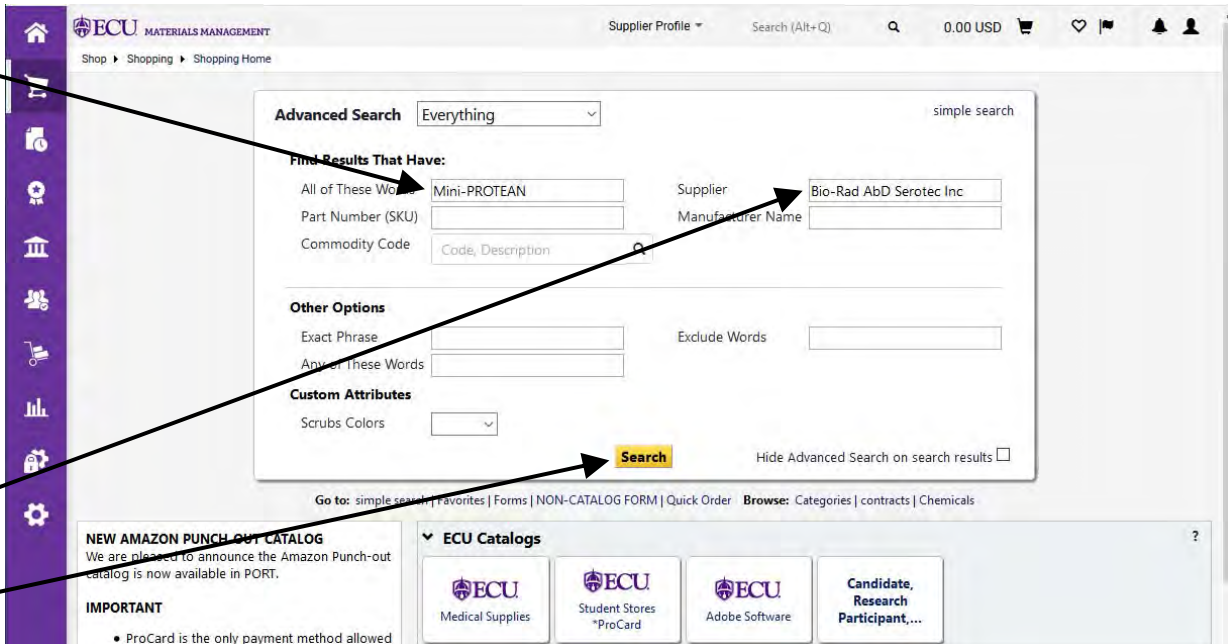
22. **Note:** You can now view the future **Requisition #** before you submit the cart. Now if you have issues with a draft cart, you can call Materials Management with the future **Requisition #** for assistance. See the **Edit Cart Header** procedure to continue the review process.

SHOPPING CART – HOSTED CATALOG

Last Updated on: 4/15/2020



1. Ensure that you are on the **home/shop** tab.
2. Click on **advance search** link to search multiple criteria for the hosted catalogs in PORT.



3. Enter desired description for item in **All of These Words** field.
4. Enter vendor's name in **Supplier Name** field.
5. Click the **Search** button.

SHOPPING CART – HOSTED CATALOG

Last Updated on: 4/15/2020

The screenshot shows the ECU Materials Management shopping cart interface. At the top, there is a navigation bar with 'Supplier Profile', 'Search (Alt+Q)', and a cart icon showing '0.00 USD'. Below the navigation bar, there is a search bar with 'Everything' selected and a 'simple search' link. The main content area is divided into sections: 'Find Results That Have:' with fields for 'All of These Words' (Mini-PROTEAN), 'Supplier' (Bio-Rad Abd Serotec Inc), 'Part Number (SKU)', 'Manufacturer Name', and 'Commodity Code'; 'Other Options' with 'Exact Phrase' and 'Exclude Words' fields; and 'Custom Attributes' with 'Scrubs Colors'. A 'Search' button is located at the bottom of this section. Below the search section, there is a results summary: 'Results for: Everything : Bio-Rad Abd Serotec Inc + Mini-PROTEAN' and 'Showing 1 - 10 of 10 Results'. The results are displayed in a table with columns for item name, price, and quantity. Three items are listed: 'PROTEUS PROTEIN A MINI PURIFICATION STARTER KIT' (164.00 USD), 'PROTEUS PROTEIN A MINI PURIFICATION SPIN COLUMN PACK' (720.00 USD), and 'PROTEUS PROTEIN A MINI PURIFICATION KIT' (617.00 USD). Each item has an 'Add to Cart' button. Callout 6 points to the search filters, callout 7 points to the 'Search' button, and callout 8 points to the 'Add to Cart' buttons.

6. The # of items found will be displayed clearly in the column.
7. Scroll down the page or select another page if appropriate to find the desired item.
8. Upon finding the desired item, change the quantity to the amount needed for the order and click **Add to Cart** button.

The screenshot shows the ECU Materials Management shopping cart interface. At the top, there is a navigation bar with 'Supplier Profile', 'Search (Alt+Q)', and a cart icon showing '720.00 USD'. Below the navigation bar, there is a search bar with 'Everything' selected and a 'simple search' link. The main content area is divided into sections: 'Find Results That Have:' with fields for 'All of These Words', 'Supplier' (Bio-Rad Abd Serotec Inc), 'Part Number (SKU)' (PUR017), 'Manufacturer Name', and 'Commodity Code'; 'Other Options' with 'Exact Phrase' and 'Exclude Words' fields; and 'Custom Attributes' with 'Scrubs Colors'. A 'Search' button is located at the bottom of this section. Below the search section, there is a results summary: 'Results for: Everything : Bio-Rad Abd Serotec Inc + Mini-PROTEAN' and 'Showing 1 - 10 of 10 Results'. The results are displayed in a table with columns for item name, price, and quantity. One item is listed: 'PROTEUS PROTEIN A MINI PURIFICATION STARTER KIT' (164.00 USD). Each item has an 'Add to Cart' button. Callout 9 points to the search filters, callout 10 points to the 'Search' button, and callout 11 points to the 'Add to Cart' button.

9. Notice the item was added to the shopping cart.
10. Enter desired catalog # in **Part Number (SKU)** field after deleting value in **All of These Words** field.
Note: We will keep the same supplier name due to PORT restriction of only 1 supplier per shopping cart / requisition.
11. Click on **Search** button.

SHOPPING CART – HOSTED CATALOG

Last Updated on: 4/15/2020

12.

ECU MATERIALS MANAGEMENT Supplier Profile Search (Alt+Q) 720.00 USD

Shop > Shopping > Shopping Home

Advanced Search Everything simple search

Find Results That Have:

All of These Words Supplier Bio-Rad AbD Serotec Inc

Part Number (SKU) PUR017 Manufacturer Name

Commodity Code Code, Description

Other Options

Exact Phrase Exclude Words

Any of These Words

Custom Attributes

Scrubs Colors

Search Hide Advanced Search on search results

Go to: simple search | Favorites | Forms | NON-CATALOG FORM | Quick Order Browse: Categories | contracts | Chemicals

Results for: Everything : Bio-Rad AbD Serotec Inc + PUR017 Showing 1 - 1 of 1 Results Compare Selected: 0

Add Keywords ?

Results Per Page 30 Sort by: Best Match Page 1 of 1 ?

PROTEUS IMAC BUFFER PACK from Bio-Rad AbD Serotec Inc 81.00 USD

Part Number PUR017 EA

Manufacturer Info PUR017 - (AbD Serotec)

4 Add to Cart

add favorite | compare

12. Change the quantity to the amount needed for the order and click **Add to Cart** button

13.

ECU MATERIALS MANAGEMENT Supplier Profile Search (Alt+Q) 1,044.00 USD

Shop > Shopping > Shopping Home

Success 4 items added, view cart.

Advanced Search Everything simple search

Find Results That Have:

All of These Words Supplier Bio-Rad AbD Serotec Inc

Part Number (SKU) PUR017 Manufacturer Name

Commodity Code Code, Description

Other Options

Exact Phrase Exclude Words

Any of These Words

Custom Attributes

Scrubs Colors

Search Hide Advanced Search on search results

Go to: simple search | Favorites | Forms | NON-CATALOG FORM | Quick Order Browse: Categories | contracts | Chemicals

Results for: Everything : Bio-Rad AbD Serotec Inc + PUR017 Showing 1 - 1 of 1 Results Compare Selected: 0

Add Keywords ?

Results Per Page 30 Sort by: Best Match Page 1 of 1 ?

PROTEUS IMAC BUFFER PACK from Bio-Rad AbD Serotec Inc 81.00 USD

Part Number PUR017 EA

Manufacturer Info PUR017 - (AbD Serotec)

4 Add to Cart

add favorite | compare

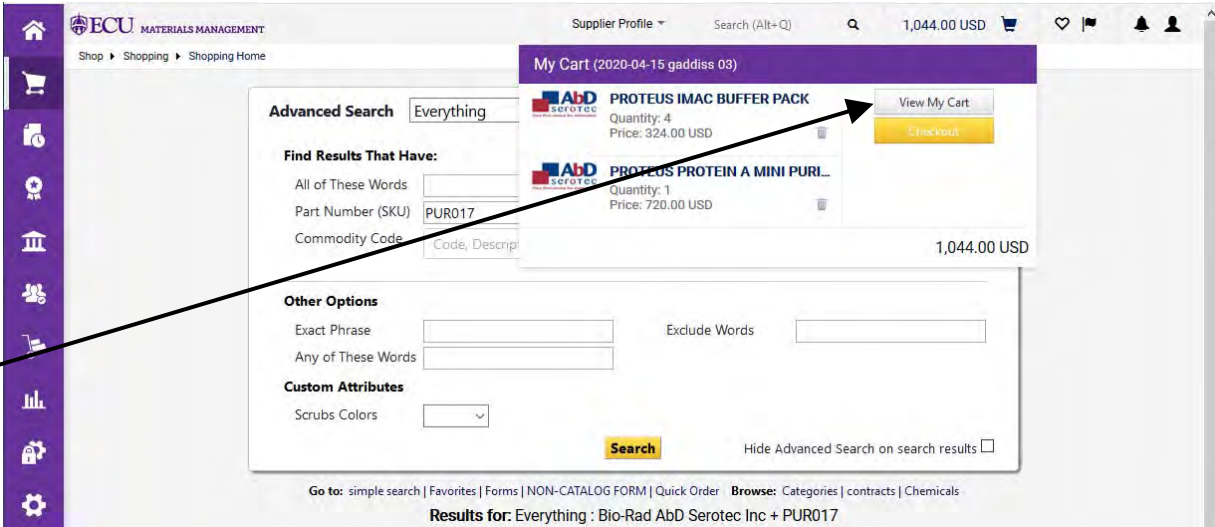
4 items added, view cart.

Products (1)

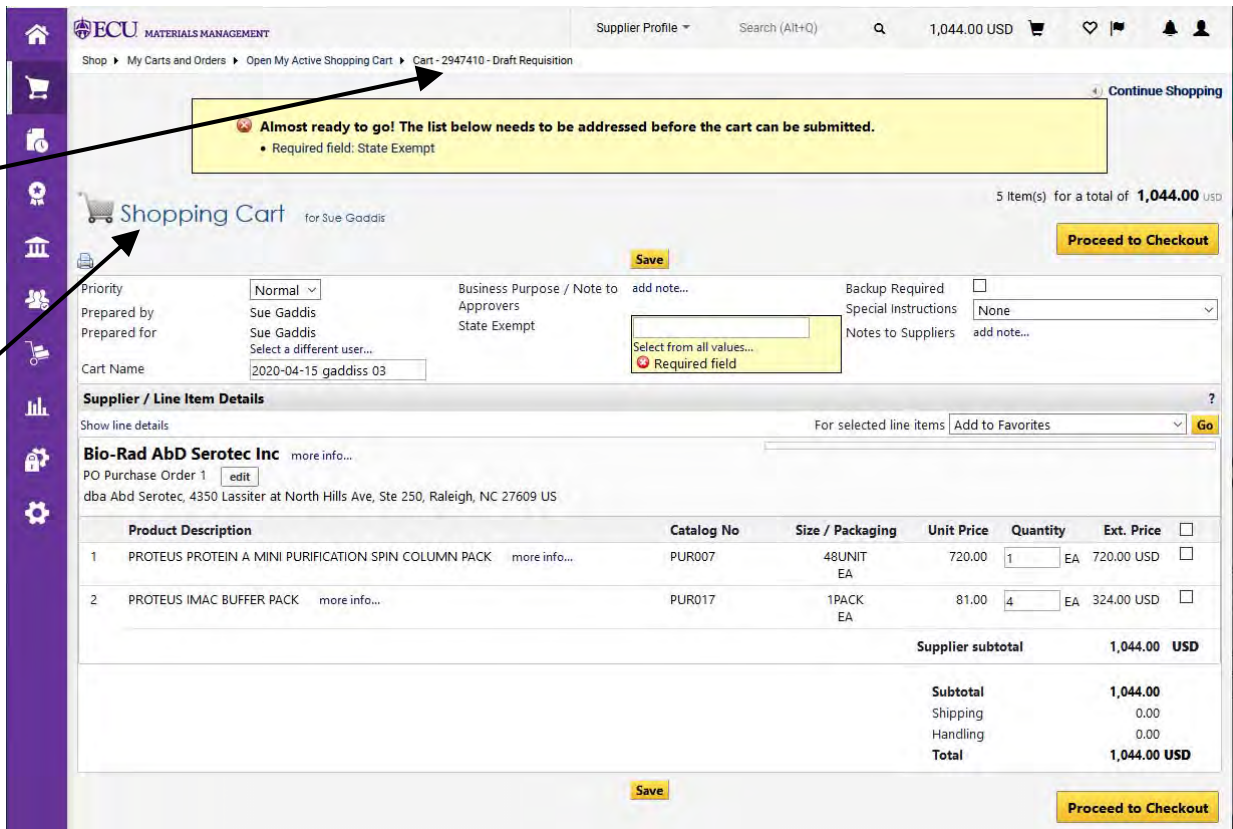
13. Notice that your shopping cart has been updated with the items that were just added. Click on the shopping cart after adding the final item to the order.

SHOPPING CART – HOSTED CATALOG

Last Updated on: 4/15/2020



14. Click on **View My Cart** button.



15. This brings you to **Shopping Cart** edit section.

16. **Note:** You can now view the future **Requisition #** before you submit the cart. Now if you have issues with a draft cart, you can call Materials Management with the future **Requisition #** for assistance. See the **Edit Cart Header** procedure to continue the review process.

SHOPPING CART – IMPROVED HOSTED CATALOG SEARCH

Last Updated on: 4/15/2020

The screenshot shows the ECU Materials Management shopping interface. At the top, there is a navigation bar with 'Shop' and 'Shopping Home' links. Below this is a search bar with a dropdown menu set to 'Everything' and the text 'gloves' entered. A yellow 'Go' button is to the right of the search bar. Below the search bar, there are several sections: 'NEW AMAZON PUNCH-OUT CATALOG', 'IMPORTANT' (with a list of ProCard rules), 'TSM - Banner ID Information', 'ECU Catalogs' (with logos for Medical Supplies, Student Stores, Adobe Software, and Candidate, Research Participant...), and 'ProCard ONLY Suppliers for orders < \$5,000' (with logos for Amazon, CDWG, Fisher Scientific, Office Depot, Grainger, Office Depot, Staples, VWR, ACR, Fastenal, and Grainger). A vertical navigation menu on the left side of the page contains icons for home, shopping cart, search, and other functions. Three numbered callouts (1, 2, 3) point to the search bar, the search input field, and the 'Go' button respectively.

1. Ensure that you are on the **home/shop** tab.
2. Enter **gloves** for item description. **Note:** This 1st example will show similar results with singular and plural search terms.
3. Click **Go** button.

The screenshot shows the search results page for 'gloves'. The search bar at the top has 'glove' entered instead of 'gloves'. The results are displayed in a table with columns for item name, part number, price, and quantity. The first three results are 'GLOVES, CHEMICAL, SMALL 4T417' from ECU Medical Storeroom, each priced at 8.12 USD. The fourth result is 'GLOVES BOXHANDLER BK' from Staples Inc, priced at 31.69 USD. A vertical navigation menu on the left side of the page contains icons for home, shopping cart, search, and other functions. Six numbered callouts (4, 5, 6) point to the search bar, the search input field, the 'Go' button, the search results table, and the 'Add to Cart' button respectively.

4. Notice the number of **items found** from your search of **gloves**.
5. Now we will delete '**s**' from **gloves** to search the singular form and retrieve similar results.
6. Click on the **Go** button.

SHOPPING CART – IMPROVED HOSTED CATALOG SEARCH

Last Updated on: 4/15/2020

The screenshot shows the ECU Materials Management shopping cart interface. The search bar contains 'glove' and the 'Go' button is highlighted. The results show 'GLOVES, CHEMICAL, SMALL 4T417' from ECU Medical Storeroom with a price of 8.12 USD. A callout box labeled '7.' points to the search bar.

Item	Price	Quantity	Action
GLOVES, CHEMICAL, SMALL 4T417 from ECU Medical Storeroom	8.12 USD	1	Add to Cart
GLOVES, CHEMICAL, SMALL 4T417 from ECU Medical Storeroom	8.12 USD	10	Add to Cart
GLOVES, CHEMICAL, SMALL 4T417 from ECU Medical Storeroom	8.12 USD	1	Add to Cart
GLOVES BOXHANDLER BK from Staples Inc	31.69 USD	1	Add to Cart

7. Notice that the results retrieved a similar number of matches with search criteria of **glove**.

The screenshot shows the ECU Materials Management shopping cart interface. The search bar contains '040-21000' and the 'Go' button is highlighted. The results show 'GLOVES, CHEMICAL, SMALL 4T417' from ECU Medical Storeroom with a price of 8.12 USD. Callout boxes labeled '8.' and '9.' point to the search bar and the 'Go' button respectively.

Item	Price	Quantity	Action
GLOVES, CHEMICAL, SMALL 4T417 from ECU Medical Storeroom	8.12 USD	1	Add to Cart
GLOVES, CHEMICAL, SMALL 4T417 from ECU Medical Storeroom	8.12 USD	10	Add to Cart
GLOVES, CHEMICAL, SMALL 4T417 from ECU Medical Storeroom	8.12 USD	1	Add to Cart

- 8. Enter the **Catalog #** with hyphen. **Note:** This 2nd example will show similar results with catalog # with and without hyphen. The same results would apply with or without spaces or misc characters.
- 9. Click the **Go** button.

SHOPPING CART – IMPROVED HOSTED CATALOG SEARCH

Last Updated on: 4/15/2020

The screenshot shows the ECU Materials Management shopping cart interface. At the top, there is a search bar with 'Shop' set to 'Everything' and the search term '040-21000'. A 'Go' button is to the right. Below the search bar, there are navigation links: 'Go to: advanced search | Favorites | Forms | NON-CATALOG FORM | Quick Order | browse: Categories | contracts | Chemicals'. The search results are displayed as 'Results for Everything : 040-21000', showing 'Showing 1 - 1 of 1 Results'. On the left, there is a 'Filter Results' sidebar with categories like 'By Supplier Class', 'By Result Type', 'By Supplier', 'By Category', and 'By Packaging UOM'. The main product listing shows 'ISOPROPYL RUBBING ALCOHOL 16OZ EA/SWAN 1368992 CARDINAL70%' with a price of '1.30 USD' and '1/BO'. The product details include 'Part Number 040-21000' and 'Santizing Wipes 0.52'. There is an 'Add to Cart' button and 'add favorite | compare' links.

11. Add Keywords

12. Go

10. Filter Results

10. Notice the result with **040-21000**.

11. Now we will delete '-' from **040-21000** to retrieve similar results.

12. Click on the **Go** button.

The screenshot shows the ECU Materials Management shopping cart interface. At the top, there is a search bar with 'Shop' set to 'Everything' and the search term '04021000'. A 'Go' button is to the right. Below the search bar, there are navigation links: 'Go to: advanced search | Favorites | Forms | NON-CATALOG FORM | Quick Order | browse: Categories | contracts | Chemicals'. The search results are displayed as 'Results for Everything : 04021000', showing 'Showing 1 - 1 of 1 Results'. On the left, there is a 'Filter Results' sidebar with categories like 'By Supplier Class', 'By Result Type', 'By Supplier', 'By Category', and 'By Packaging UOM'. The main product listing shows 'ISOPROPYL RUBBING ALCOHOL 16OZ EA/SWAN 1368992 CARDINAL70%' with a price of '1.30 USD' and '1/BO'. The product details include 'Part Number 040-21000' and 'Santizing Wipes 0.52'. There is an 'Add to Cart' button and 'add favorite | compare' links.

13. Add Keywords

13. Notice the same item was retrieve with **04021000** as **040-21000**.

SHOPPING CART – IMPROVED HOSTED CATALOG SEARCH

Last Updated on: 4/15/2020

The screenshot shows the ECU Materials Management shopping cart interface. At the top, there is a search bar with 'gauze' entered and a 'Go' button. Below the search bar, the results for 'gauze' are displayed, showing one result: 'ISOPROPYL RUBBING ALCOHOL 16OZ EA/SWAN 1368992 CARDINAL70%' from ECU Medical Storeroom. The price is 1.30 USD. The interface includes a sidebar with filter options and a main content area with product details and an 'Add to Cart' button.

14.

15.

14. Enter **gauze** for search criteria. **Note:** This 3rd example will show similar results with misspelled search entries.

15. Click on the **Go** button.

The screenshot shows the ECU Materials Management shopping cart interface with search results for 'gauze'. The search bar contains 'gauze' and the 'Go' button is highlighted. The results show 200 of 4000+ results. The first three results are 'BULK GAUZE N/S 2"X2" 4PLY 200/PK NW2204' from ECU Medical Storeroom, priced at 0.65 USD. The fourth result is '020-20490 GAUZE ST. 4X4 12 PLY PK OF 10 PK/10 128CSE J&J2322(GZ4412-10) from ECU Medical Storeroom, priced at 4.40 USD. The interface includes a sidebar with filter options and a main content area with product details and an 'Add to Cart' button.

17.

18.

16.

16. Notice the number of items retrieve from your search of **gauze**.

17. Now we will misspell **gauze** by entering **gauze** to retrieve similar results.

18. Click on the **Go** button.

SHOPPING CART – IMPROVED HOSTED CATALOG SEARCH

Last Updated on: 4/15/2020

The screenshot displays the ECU Materials Management shopping cart interface. At the top, the header includes the ECU logo, 'MATERIALS MANAGEMENT', 'Supplier Profile', a search bar with 'gauss' entered, and a currency indicator '0.00 USD'. Below the header, the search bar shows 'Shop Everything' and 'gauss' with a 'Go' button. The search results are displayed as follows:

Go to: advanced search | Favorites | Forms | NON-CATALOG FORM | Quick Order **Browse:** Categories | contracts | Chemicals

Results for: Everything : gauss

Showing 1 - 200 of 4000+ Results What does "+" mean? Compare Selected: 0

Results Per Page: 200 Sort by: Best Match Page 1 of 20

Product Name	Part Number	Manufacturer Info	Order from Supplier
HR4-943/Magnetic Base - Strong (9,000 gauss) - each HR4-943	500113	HR4-943 - (Hampton Research)	EA add favorite compare
Neodymium Iron Boron (NdFeB) , Rare Earth Magnets, Shape: Rectangle, D/L: 0.5, W/d: 0.5, H: 0.125, Material: NdFeB 36, Gauss: 12200; 1/EA	NC9898496	3054306 - (Scientifics Direct)	EA add favorite compare
Axial Probe, 4 in. for model 5170 gauss meter 2000130	50632937	2000130 - (Cole Parmer 3P)	EA add favorite compare
Transverse Probe, 4 in. for model 5180 Gauss Meter 2000131	50632938	2000131 - (Cole Parmer 3P)	EA add favorite compare

On the left side, there is a navigation menu with icons for Home, Shopping, and various filters. A box labeled '19.' points to the search results area.

19. Notice that the results retrieved are a similar number of matches with search criteria of **gauss**. This completes the steps for **Improve Hosted Catalog Searches**.

SHOPPING CART – FILTER ON MULTIPLE VALUES FOR HOSTED CATALOG

Last Updated on: 4/15/2020

1. Ensure that you are on the home/shop tab.

2. Enter **gauze** for item description.

3. Click **Go** button.

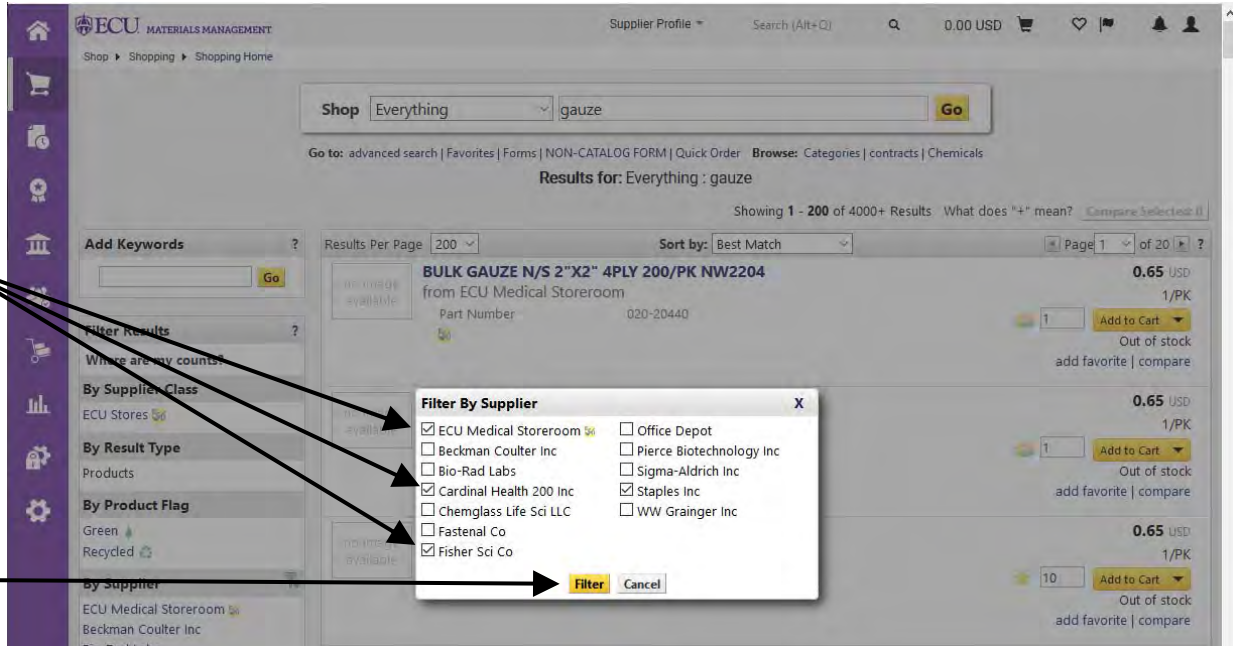
1. Ensure that you are on the home/shop tab.
2. Enter **gauze** for item description.
3. Click **Go** button.

4. Click on the **add filter** icon to filter **By Supplier**.

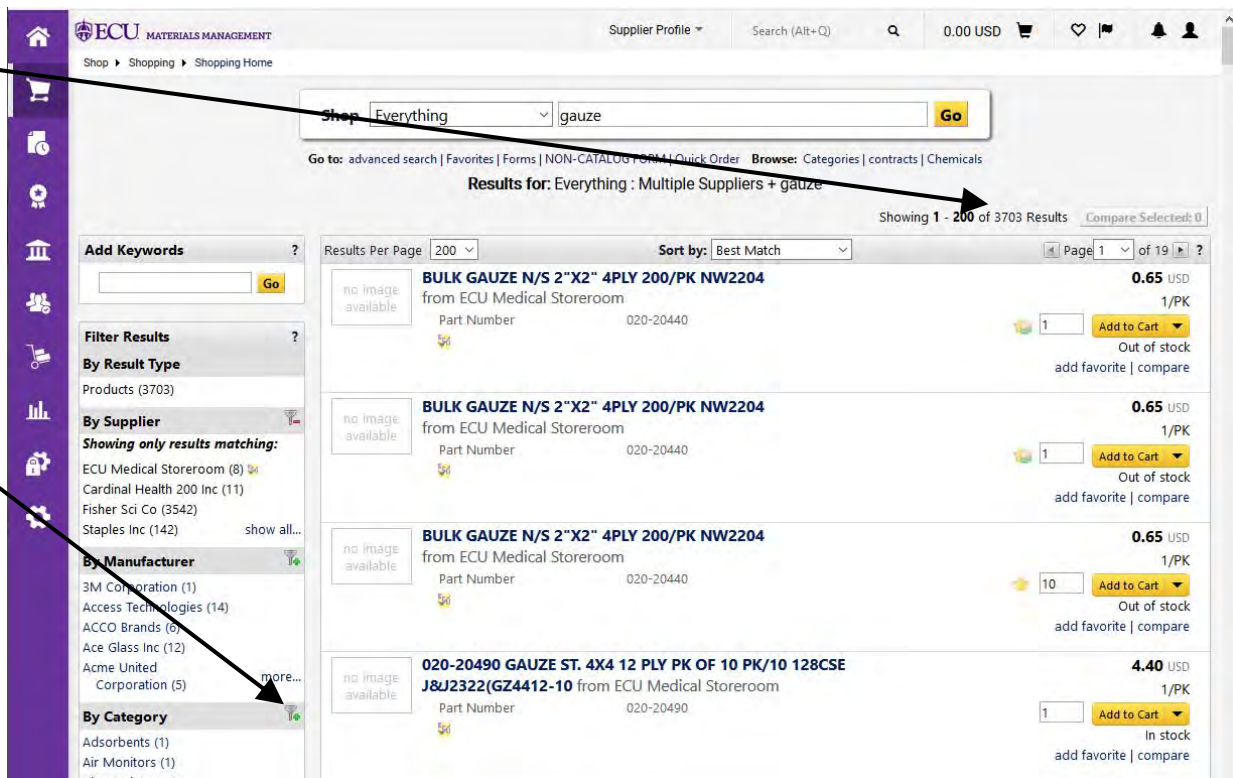
4. Click on the **add filter** icon to filter **By Supplier**.

SHOPPING CART – FILTER ON MULTIPLE VALUES FOR HOSTED CATALOG

Last Updated on: 4/15/2020



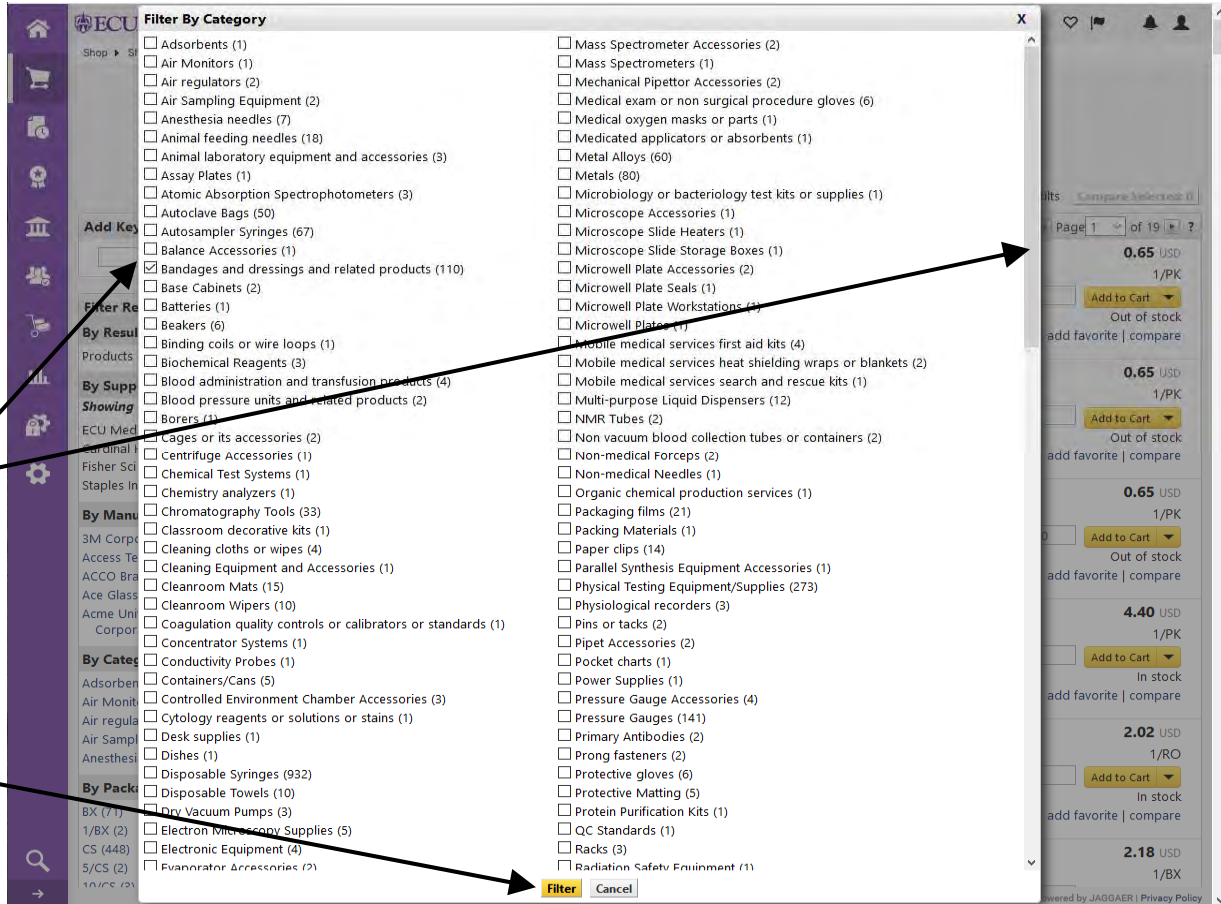
5. Select the suppliers that you would like to use as a filter.
6. Click on **Filter** button.



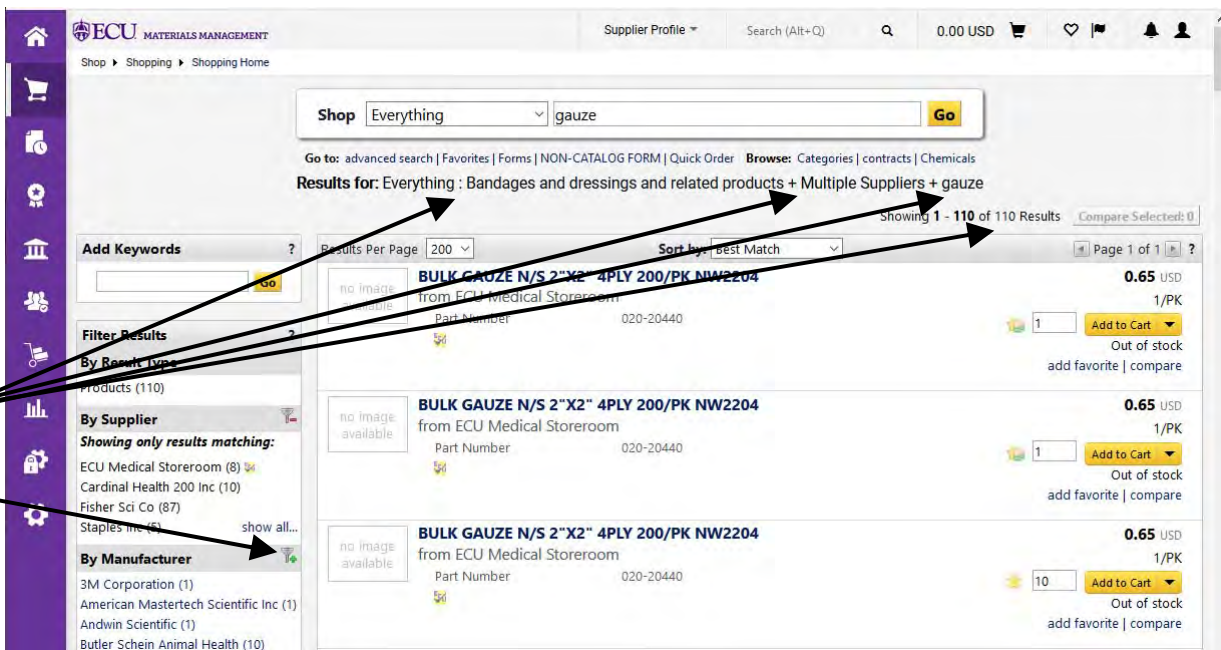
7. Note that the total results count reduced to only include “gauze” for suppliers that were used as filters.
8. Click on the **add filter** icon to filter **By Category**.

SHOPPING CART – FILTER ON MULTIPLE VALUES FOR HOSTED CATALOG

Last Updated on: 4/15/2020



9. Select the Categories that you would like to use as a filter. Scroll to find additional filter options.
10. Click **Filter** button.



11. Notice the results from the filtered criteria.
12. **Note:** There must be 3 or more values present for the filter icon to display.

SHOPPING CART – FILTER ON MULTIPLE VALUES FOR HOSTED CATALOG

Last Updated on: 4/15/2020

13.

Shop Everything gauze Go

Go to: advanced search | Favorites | Forms | NON-CATALOG FORM | Quick Order Browse: Categories | contracts | Chemicals

Results for: Everything : Bandages and dressings and related products + Multiple Suppliers + gauze

Showing 1 - 110 of 110 Results Compare Selected: 0

Add Keywords ?

Filter Results ?

By Result Type

Products (110)

By Supplier

Showing only results matching:

- ECU Medical Storeroom (8)
- Cardinal Health 200 Inc (10)
- Fisher Sci Co (87)
- Staples Inc (5) show all...

By Manufacturer

- 3M Corporation (1)
- American Mastertech Scientific Inc (1)
- Andwin Scientific (1)
- Butler Schein Animal Health (10)

Results Per Page 200 Sort by: Best Match Page 1 of 1 ?

no image available	BULK GAUZE N/S 2"X2" 4PLY 200/PK NW2204 from ECU Medical Storeroom Part Number 020-20440	0.65 USD 1/PK
no image available	BULK GAUZE N/S 2"X2" 4PLY 200/PK NW2204 from ECU Medical Storeroom Part Number 020-20440	0.65 USD 1/PK
no image available	BULK GAUZE N/S 2"X2" 4PLY 200/PK NW2204 from ECU Medical Storeroom Part Number 020-20440	0.65 USD 1/PK

13. To remove a filter, click remove selected filter icon.

14.

Shop Everything gauze Go

Go to: advanced search | Favorites | Forms | NON-CATALOG FORM | Quick Order Browse: Categories | contracts | Chemicals

Results for: Everything : Bandages and dressings and related products + gauze

Showing 1 - 200 of 247 Results Compare Selected: 0

Add Keywords ?

Filter Results ?

By Supplier Class

ECU Stores (8)

By Result Type

Products (247)

By Supplier

Showing only results matching:

- ECU Medical Storeroom (8)
- Cardinal Health 200 Inc (10)
- Fastenal Co (31)
- Fisher Sci Co (87)
- Staples Inc (5) more...

By Manufacturer

- 3M Corporation (1)
- American Mastertech Scientific Inc (1)
- AMERICAN RED CROSS (6)
- Andwin Scientific (1)
- BRASEL PRODUCTS (1) more...

By Category

Showing only results matching:

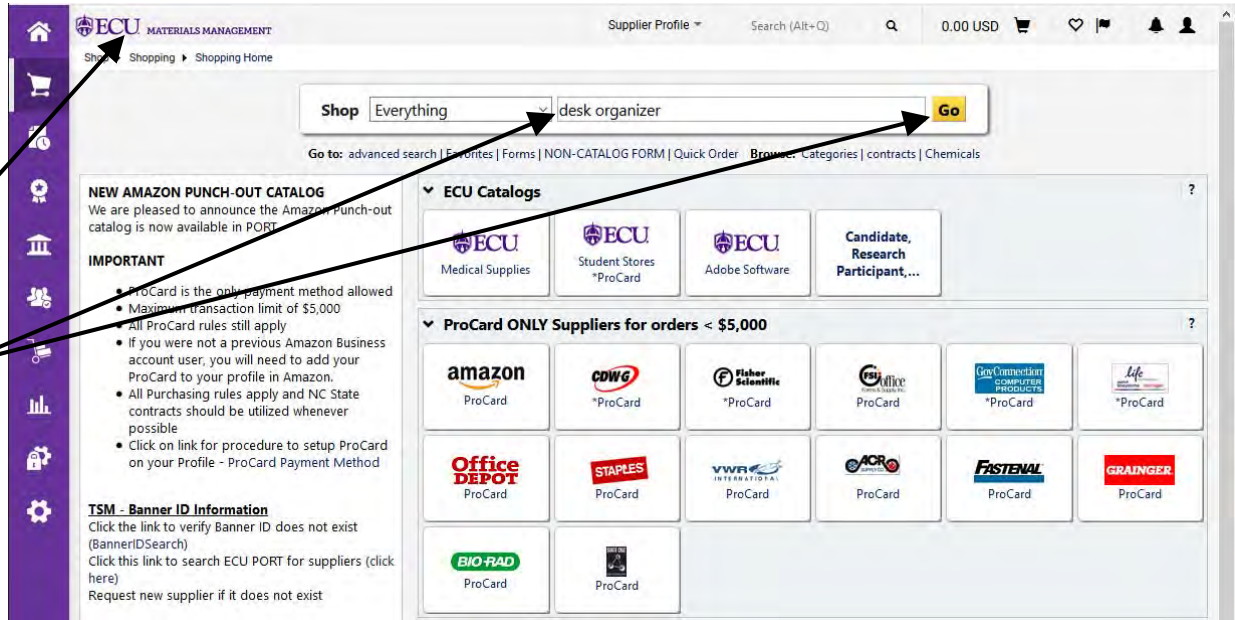
Results Per Page 200 Sort by: Best Match Page 1 of 2 ?

no image available	BULK GAUZE N/S 2"X2" 4PLY 200/PK NW2204 from ECU Medical Storeroom Part Number 020-20440	0.65 USD 1/PK
no image available	BULK GAUZE N/S 2"X2" 4PLY 200/PK NW2204 from ECU Medical Storeroom Part Number 020-20440	0.65 USD 1/PK
no image available	BULK GAUZE N/S 2"X2" 4PLY 200/PK NW2204 from ECU Medical Storeroom Part Number 020-20440	0.65 USD 1/PK
no image available	020-20490 GAUZE ST. 4X4 12 PLY PK OF 10 PK/10 128CSE J&J2322(GZ4412-10) from ECU Medical Storeroom Part Number 020-20490	4.40 USD 1/PK In stock

14. Notice the increase in results from removing the filter. **Note:** You can use the following filters: By Supplier Class, By Supplier, By Manufacture Name, By Category, By Product Flag, and By Packaging UOM. This completes the steps for **Filter on Multiple Values for Hosted Catalog Searches**.

SHOPPING CART – HOSTED CATALOG – LEVEL 2 PUNCH-OUT

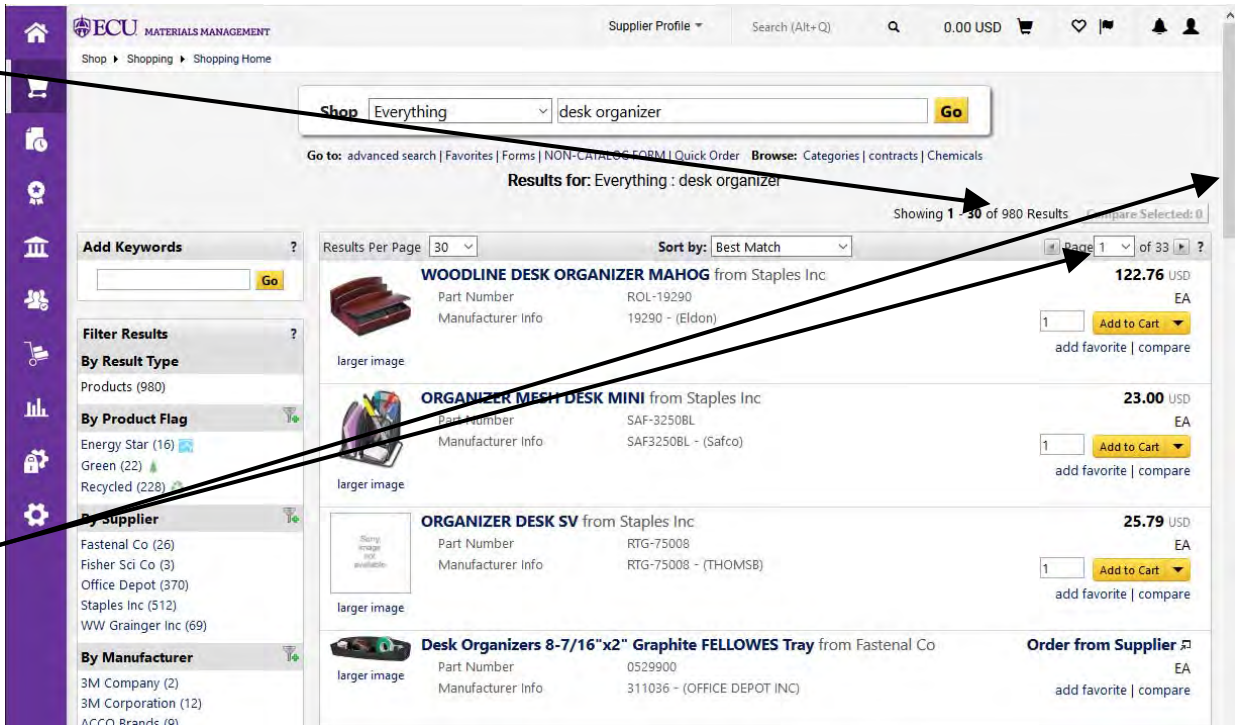
Last Updated on: 4/15/2020



1.

2.

1. Ensure that you are on the **home/shop** tab.
2. Enter **green folders** and click on the **Go** button. **Note:** Office Depot is the only punch-out supplier to enable the SmartFind Level 2 feature that will display some of their catalog items in a PORT hosted catalog search.



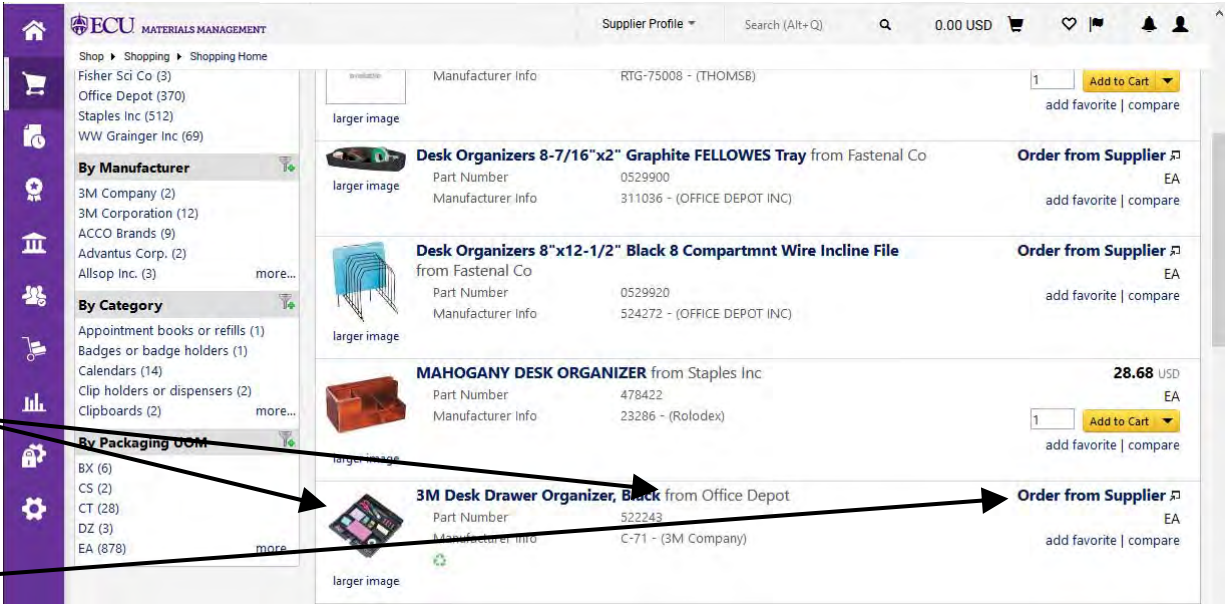
3.

4.

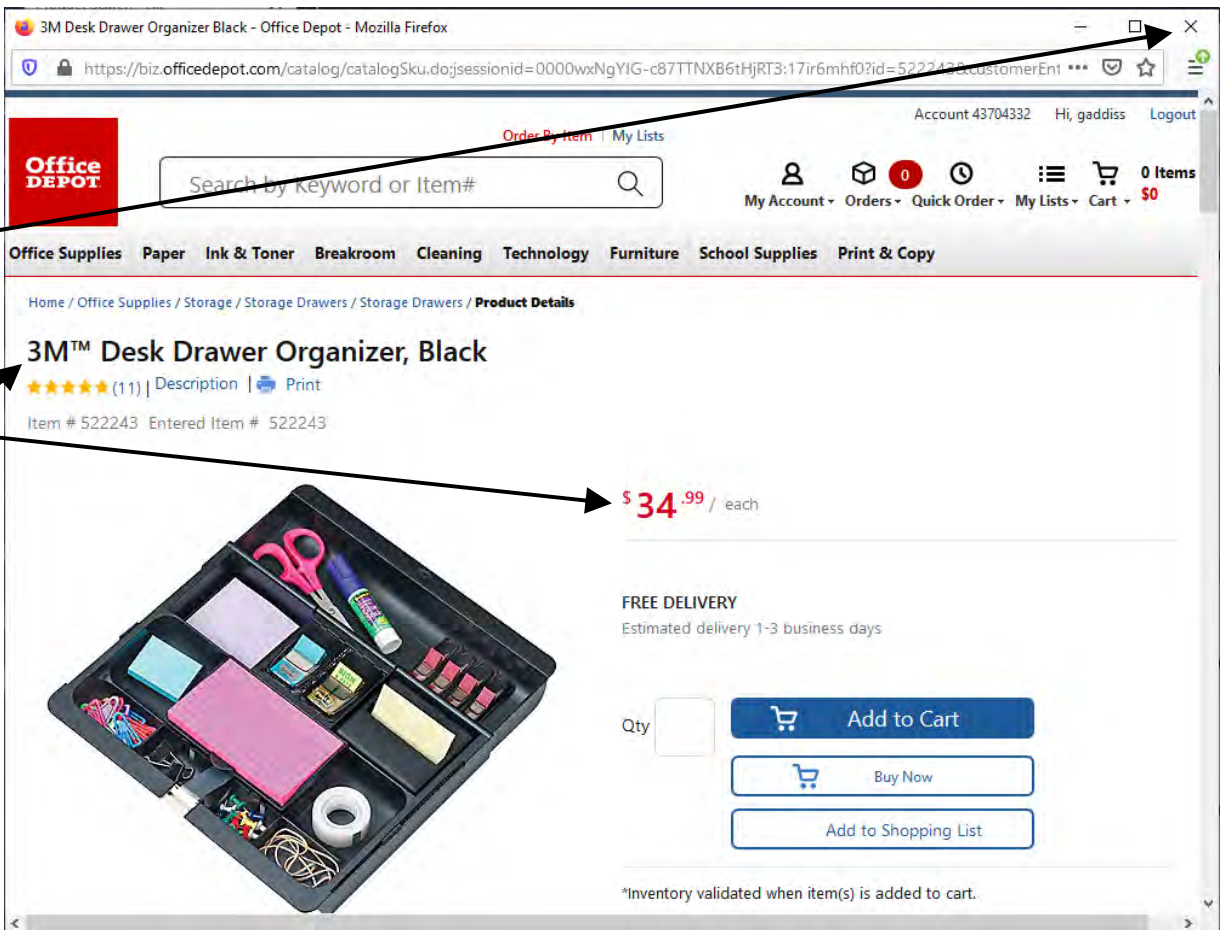
3. The # of items found will be displayed above the results.
4. Scroll down the page or select another page if appropriate to find the desired item.

SHOPPING CART – HOSTED CATALOG – LEVEL 2 PUNCH-OUT

Last Updated on: 4/15/2020



5. Notice the items for Office Depot may have an image and will identify the supplier.
6. Click on the **Order from Supplier** link to see item pricing.



7. Now you can determine if the Office Depot item is comparable in price.
8. Click on **X** to close the pop-up window to return to PORT. **Note:** If you want to order the items, you would enter the desired quantity and click Add to Cart button.

SHOPPING CART – HOSTED CATALOG – LEVEL 2 PUNCH-OUT

Last Updated on: 4/15/2020

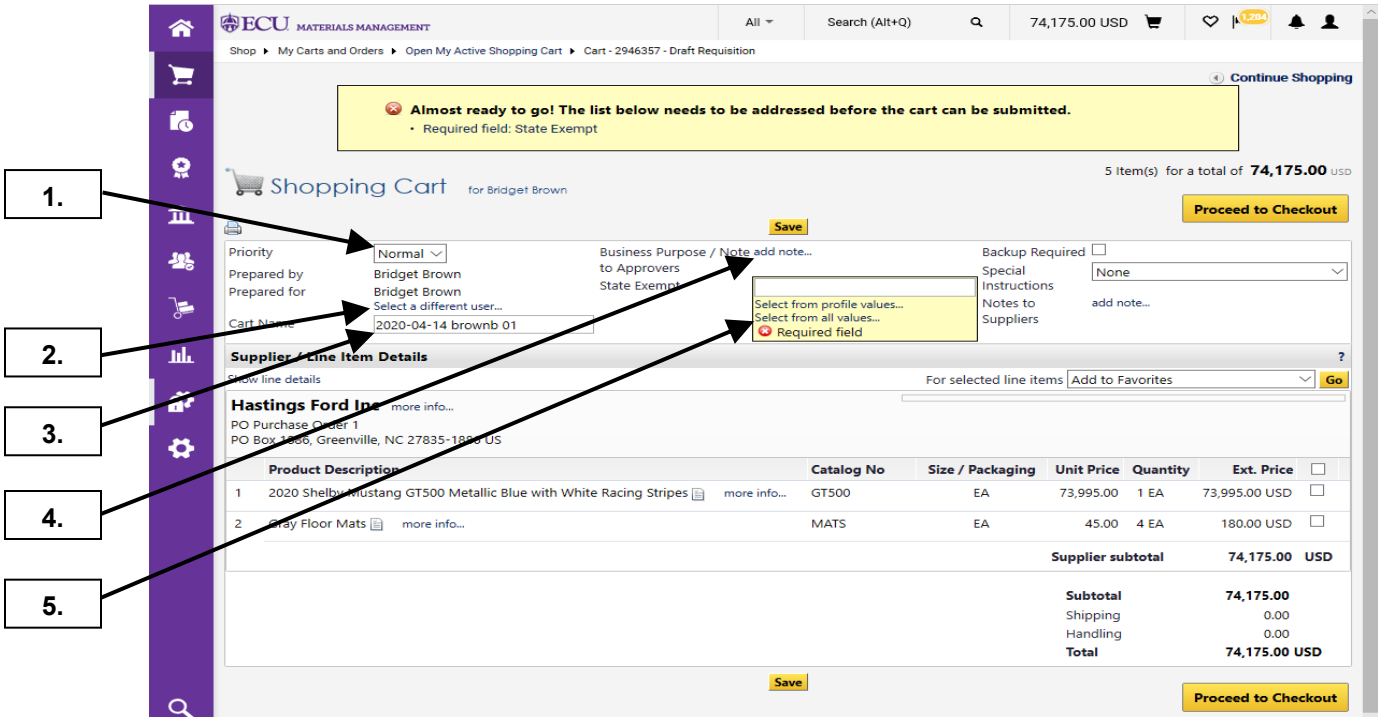
The screenshot displays the ECU Materials Management shopping cart interface. At the top, the header includes the ECU logo, 'MATERIALS MANAGEMENT', 'Supplier Profile', a search bar with 'desk organizer' entered, and a 'Go' button. Below the search bar, there are navigation links: 'Go to: advanced search | Favorites | Forms | NON-CATALOG FORM | Quick Order' and 'Browse: Categories | contracts | Chemicals'. The search results are displayed as 'Results for: Everything : desk organizer' and 'Showing 1 - 30 of 980 Results'. On the left side, there is a vertical navigation menu with icons for home, shopping cart, search, and other functions. A box with the number '9.' has an arrow pointing to the search bar area. The main content area shows a list of products with their details and prices:

Product Name	Supplier	Price (USD)
WOODLINE DESK ORGANIZER MAHOG	Staples Inc.	122.76
ORGANIZER MESH DESK MINI	Staples Inc.	23.00
ORGANIZER DESK SV	Staples Inc.	25.79
Desk Organizers 8-7/16" x2" Graphite FELLOWES Tray	Fastenal Co	Order from Supplier

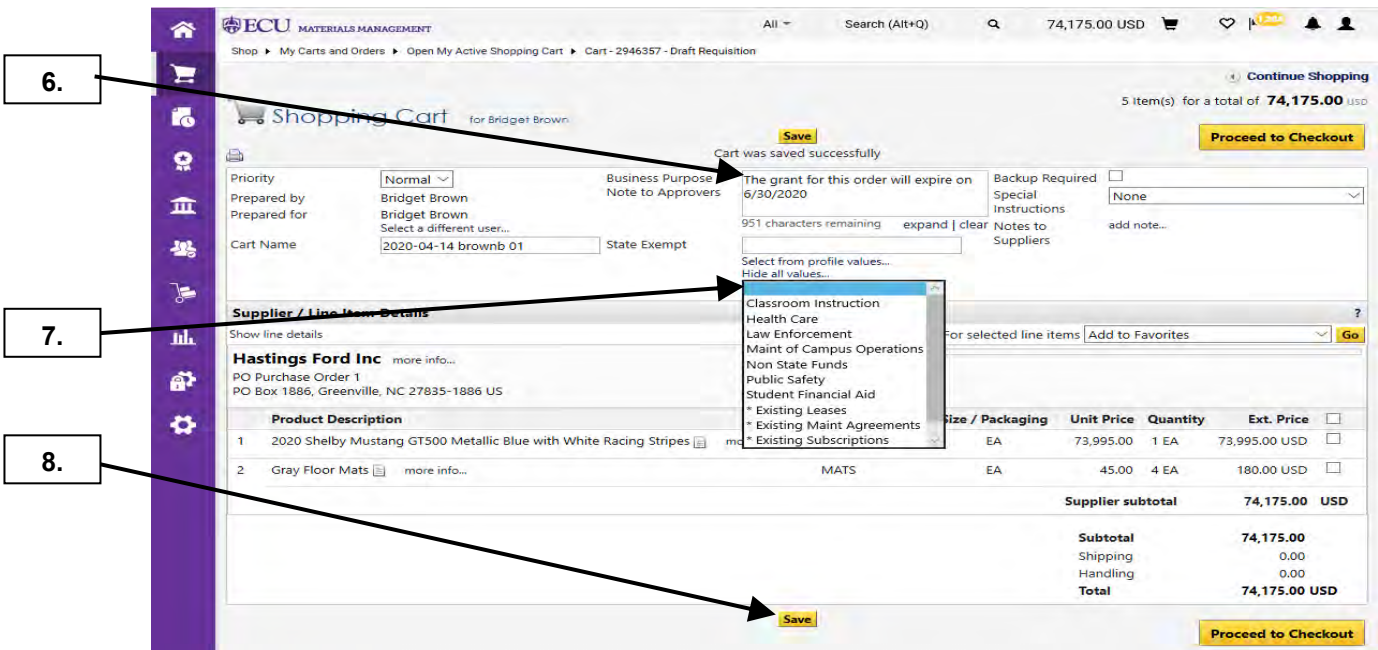
9. This brings you back to the PORT hosted catalog search. You can continue shopping by repeating steps 2 – 8 to compare hosted catalog items with Office Depot punch-out catalog items. After determining the supplier with the most competitive pricing for the items needed, you can either do a hosted catalog order or a punch-out catalog order with Office Depot.

EDIT CART HEADER

Last Updated on: 4/14/2020



1. Select the appropriate **Priority** for the requisitions: **Note: Normal** indicates that the requisition will be processed into a PO by MM within 2 days. **Urgent** indicates that the requisition will be processed into a PO by MM within 1 day.
2. If you are creating a requisition for another PORT Standard Requisitioner to track, click on **Select a different user**. See steps 14 – 18.
3. **Optional:** Type in a meaningful name for the requisition to track it by in your history.
4. Click the **add note...** link for **Business Purpose/Note to Approvers** if appropriate.
5. Click **select from all values...** for State Exempt field.



6. Enter your note to approvers and/or Materials Management. This is for internal notes **ONLY**.
7. Select the appropriate **State Exempt** category for your order.
8. Click on the **Save** button.

EDIT CART HEADER

Last Updated on: 4/14/2020

9. Select the **Backup Required** check box to indicate that the supplier will require backup with the PO.

10. Select the appropriate option for **Special Instructions**: Check Attached, Confirming Order - Do Not Send, or None.

11. Repeat steps 4 to complete **Notes to Suppliers**.

12. Click the **Save** button to save all your Header changes. See the **Edit Cart Items** procedure to continue the review process. **Steps 13 – 17** take you through the process of preparing a requisition for another requisitioner.

EDIT CART HEADER

Last Updated on: 4/14/2020

The screenshot shows the ECU Materials Management Shopping Cart interface. A 'User Search' pop-up window is open, displaying a search form with fields for Last Name, First Name, User Name, Email, Department, Position, and Role. The 'Last Name' field contains 'Kornegay'. A 'Search' button is at the bottom of the pop-up. In the background, the 'Prepared for' field has a dropdown menu with the option 'Select a different user...'. Callout 14 points to the 'User Search' pop-up, callout 13 points to the 'Select a different user...' link, and callout 15 points to the 'Search' button.

13. To prepare a requisition for another PORT user, click on **Select a different user...**

14. In the **User Search** pop-up, type the PORT standard requisitioner's **Last Name**.

15. Click the **Search** button.

The screenshot shows the ECU Materials Management Shopping Cart interface. The 'User Search' pop-up window is open, displaying search results in a table. The table has columns for Name, User Name, Email, Phone, and Action. The first row shows 'Kornegay, Chance' with a '[select]' link in the Action column. Callout 16 points to the '[select]' link.

Name	User Name	Email	Phone	Action
Kornegay, Chance	kornegaych	kornegaych@ecu.edu	+1 252-328-5431	[select]

16. Click on the **select** link.

EDIT CART HEADER

Last Updated on: 4/14/2020

Shop > My Carts and Orders > Open My Active Shopping Cart > Cart - 2946357 - Draft Requisition

Continue Shopping

5 Item(s) for a total of **74,175.00** USD

Save Proceed to Checkout

Cart was saved successfully

Priority: Normal
Prepared by: Bridget Brown
Prepared for: **Chance Kornegay**
Cart Name: 2020-04-14 brownb 01 State Exempt

Business Purpose / Note to Approvers: The grant for this order will expire on 6/30/2020

Backup Required:
Special Instructions: None

Notes to Suppliers: 951 characters remaining expand | clear add note...

Non State Funds

Supplier / Line Item Details

Show line details For selected line items Add to Favorites Go

Hastings Ford Inc more info...
PO Purchase Order 1
PO Box 1886, Greenville, NC 27835-1886 US

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 2020 Shelby Mustang GT500 Metallic Blue with White Racing Stripes more info...	GT500	EA	73,995.00	1 EA	73,995.00 USD
2 Gray Floor Mats more info...	MATS	EA	45.00	4 EA	180.00 USD
Supplier subtotal					74,175.00 USD
Subtotal					74,175.00
Shipping					0.00
Handling					0.00
Total					74,175.00 USD

Save Proceed to Checkout

17.

17. The **Prepared for** now indicates the user you selected. See the **Edit Cart Items** procedure to continue the review process.

EDIT CART ITEMS

Last Updated on: 4/14/2020

Shop > My Carts and Orders > Open My Active Shopping Cart > Cart - 2946357 - Draft Requisition

Continue Shopping

6 Item(s) for a total of **75,675.00** USD

Proceed to Checkout

Save

Priority: Normal
 Prepared by: Bridget Brown
 Prepared for: Bridget Brown
 Cart Name: 2020-04-14 brownb 01

Business Purpose / Note to Approvers: The grant for this order will expire on 6/30/2020

Backup Required:
 Special Instructions: None

951 characters remaining expand | clear Notes to Suppliers add note...

State Exempt: Non State Funds

Supplier / Line Item Details

For selected line items: **Add to Favorites** (selected), Remove Selected Items, Remove All Items, Move to Another Cart, Change Supplier, Add to Draft Cart or Pending PR/PO, Change Commodity Code

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
2020 Shelby Mustang GT500 Metallic Blue with White Racing Stripes	GT500	EA	73,995.00	1 EA	73,995.00 USD
Gray Floor Mats	MATS	EA	45.00	4 EA	180.00 USD
6 year 75,000 mile drivetrain warranty	Warranty	EA	1,500.00	1 EA	1,500.00 USD

Supplier subtotal: **75,675.00** USD

Subtotal: **75,675.00**
 Shipping: 0.00
 Handling: 0.00
 Total: **75,675.00** USD

1. To delete an item from a cart, select the check box that corresponds with that item
2. Click the **For Selected line items** drop down box and select **Remove Selected Items**.

Shop > My Carts and Orders > Open My Active Shopping Cart > Cart - 2946357 - Draft Requisition

Continue Shopping

6 Item(s) for a total of **75,675.00** USD

Proceed to Checkout

Save

Priority: Normal
 Prepared by: Bridget Brown
 Prepared for: Bridget Brown
 Cart Name: 2020-04-14 brownb 01

Business Purpose / Note to Approvers: The grant for this order will expire on 6/30/2020

Backup Required:
 Special Instructions: None

951 characters remaining expand | clear Notes to Suppliers add note...

State Exempt: Non State Funds

Supplier / Line Item Details

For selected line items: **Remove Selected Items** (selected)

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
2020 Shelby Mustang GT500 Metallic Blue with White Racing Stripes	GT500	EA	73,995.00	1 EA	73,995.00 USD
Gray Floor Mats	MATS	EA	45.00	4 EA	180.00 USD
6 year 75,000 mile drivetrain warranty	Warranty	EA	1,500.00	1 EA	1,500.00 USD

Supplier subtotal: **75,675.00** USD

Subtotal: **75,675.00**
 Shipping: 0.00
 Handling: 0.00
 Total: **75,675.00** USD

3. Click the **Go** button to remove the item.

EDIT CART ITEMS

Last Updated on: 4/14/2020

Shop > My Carts and Orders > Open My Active Shopping Cart > Cart - 2946357 - Draft Requisition

Continue Shopping

5 Item(s) for a total of **74,175.00 USD**

Proceed to Checkout

Save

Priority: Normal | Business Purpose / Note to Approvers: The grant for this order will expire on 6/30/2020 | Backup Required: | Special Instructions: None

Prepared by: Bridget Brown | Prepared for: Bridget Brown | Cart Name: 2020-04-14 brownb 01 | State Exempt: Non State Funds

Supplier / Line Item Details

Hastings Ford Inc

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 2020 Shelby Mustang GT500 Metallic Blue with White Racing Stripes	GT500	EA	73,995.00	1 EA	73,995.00 USD
2 Gray Floor Mats	MATS	EA	45.00	4 EA	180.00 USD
Supplier subtotal					74,175.00 USD
Subtotal					74,175.00
Shipping					0.00
Handling					0.00
Total					74,175.00 USD

4. **Note:** The line item has been removed from the cart.
5. To edit the line item description, price, quantity, or unit of measure, click on the **Product Description**.
Note: You can **ONLY** change the product description and pricing for **Non-Catalog** orders.

Non-Catalog Form

East Carolina UNIVERSITY

NON-CATALOG FORM

Supplier Information

Supplier: Hastings Ford Inc

Fulfillment Address: PO Purchase Order 1: (preferred) PO Box 1886 Greenville, NC 27835-1886 US

Product Information

Catalog No.: MATS

Product Description: Black, Rugged Floor Mats

Quantity: 4

UOM: EA - Each

Estimated Price: 49.00

Go

6. Make the appropriate changes to the **Product Description**, **Additional Description**, **Quantity**, **UOM**, or **Estimated Price**.
7. Click on the **Go** button to save the changes to the shopping cart.

EDIT CART ITEMS

Last Updated on: 4/14/2020

Non-Catalog Form

Available Actions: Save **Close**

East Carolina UNIVERSITY

Non-Catalog Form Instructions

Use of this form:

- This form is to be used when items are not available in a host or punch-out catalog within the PORT system.
- Non-catalog requests should be entered using current item description, pricing and catalog numbers.
- Fields in "Bold" are required.

NON-CATALOG FORM

Supplier Information

Supplier Instructions
Supplier: Hastings Ford Inc. more info... select different supplier

Fulfillment Address
PO Purchase Order 1: (preferred)
PO Box 1886
Greenville, NC 27835-1886 US
USD

Currency: USD

Distribution
The system will distribute purchase orders using the method(s) indicated below:
Fax: Manual
Manual: [1 919-659-6118](tel:19196596118)

Product Information

Product Instructions
Catalog No.: MATS

Manufacturer Part No.:
Manufacturer Name:
Description Instructions: Enter a complete and specific description.
Product Description: **Black Rugged** Floor Mats
231 characters remaining expand | clear

Additional Description:
1000 characters remaining expand | clear

Quantity: 4
UOM: EA - Each
Estimated Price: 49.00

Contract Date Instructions: Enter maintenance agreement or contract dates.
Maintenance Agreement or Contract Start Date:

8. Click the **Close** button to return the cart.

ECU MATERIALS MANAGEMENT

All Search (Alt+Q) 74,191.00 USD

Shop > My Carts and Orders > Open My Active Shopping Cart > Cart - 2946357 - Draft Requirement

Shopping Cart for Bridget Brown

5 Item(s) for a total of **74,191.00 USD**

Save **Proceed to Checkout**

Priority: Normal Business Purpose / Note to Approvers: The grant for this order will expire on 6/30/2020 Backup Required: Special Instructions: None

Prepared by: Bridget Brown
Prepared for: Bridget Brown
Cart Name: 2020-04-14 brownb 01 State Exempt

951 characters remaining expand | clear Notes to Suppliers: add note...

Supplier / Line Item Details

Supplier: **Hastings Ford Inc** more info...
PO Purchase Order 1
PO Box 1886, Greenville, NC 27835-1886 US

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 2020 Shelby Mustang GT500 Metallic Blue with White Racing Stripes more info...	GT500	EA	73,995.00	1 EA	73,995.00 USD
2 Black Rugged Floor Mats more info...	MATS	EA	49.00	4 EA	196.00 USD
Supplier subtotal					74,191.00 USD
Subtotal					74,191.00
Shipping					0.00
Handling					0.00
Total					74,191.00 USD

Save **Proceed to Checkout**

- Note that any changes to **Product Description**, **Additional Description**, **Quantity**, **UOM**, or **Estimated Price** have been updated in the shopping cart.
- Click on the **Proceed to Checkout** button.

EDIT CART ITEMS

Last Updated on: 4/14/2020

11.

Orders > Search > Requisitions > Summary - 2946357 - Draft Requisition

General Internal Note Order Info FOAPAL / Ship Codes Final Review Submit Requisition

Go to Express Checkout Return to shopping cart Continue Shopping

All done! The required information has been completed and this request is ready to be submitted.
Once you have reviewed the details, you may continue by clicking the button at the top of the page.

Requisition PR Approvals PO Preview Comments Attachments History

Summary General FOAPAL / Ship Codes Supplier Info Taxes/S&H

Hide header Hide value descriptions

General	Internal Note	Order Info
<p>Priority Normal <input type="button" value="edit"/></p> <p>Department Administration and Finance (Administration and Finance)</p> <p>Prepared by Bridget Brown</p> <p>Prepared for Bridget Brown</p> <p>Cart Name 2020-04-14 brownb 01</p> <p>Accounting Date no value</p> <p>Accruals no value</p> <p>Bill To <input type="button" value="edit"/> East Carolina University Accounts Payable 120 Reade St. Fin. Srv. Bldg. ACCOUNTSPAYABLE@ecu.edu Greenville, NC 27858-4353 United States</p>	<p>Internal Info <input type="button" value="edit"/></p> <p>Business Purpose / Note to Approvers The grant for this order will expire on 6/30/2020</p> <p>State Exempt Non State Funds</p> <p>Internal Attachments <input type="button" value="Add Attachments"/></p>	<p>Order Info <input type="button" value="edit"/></p> <p>Backup Required ✘</p> <p>Pricing Ref # no value</p> <p>Special Instructions None</p> <p>Notes to Suppliers no note</p> <p>Attachments for all suppliers <input type="button" value="Add Attachments"/></p> <p>PO Clauses 100 NC T&C 200 Funds 300 ECU PO conditions view all clauses - (3)</p>

View/edit by line item...

FOAPAL / Ship Codes						
Chart	Fund	Organization	Account	Program	Activity	Location
E	111170	230603	72110	0000	no value	no value
East Carolina University	AA General Institutional Support	AF Medical Stores	Office Supplies	Default Program Code		

11. See the **Review** procedures to continue the cart review process.

CHANGE SUPPLIER ACTION

Last Updated on: 4/14/2020

The screenshot shows the 'Shopping Cart' for Bridget Brown with a total of 5 items for 74,191.00 USD. The interface includes a top navigation bar, a left sidebar with icons, and a main content area. A 'Save' button is visible above the order details. The order details section includes fields for Priority (Normal), Prepared by (Bridget Brown), Cart Name (2020-04-14 brownb 01), Business Purpose (State Exempt), and The grant for this order will expire on (6/30/2020). Below this is the 'Supplier / Line Item Details' section. A dropdown menu is open for 'For selected line items', showing options: Add to Favorites, Remove Selected Items, Move to Another Cart, Change Supplier, Add to Draft Cart or Pending PR/PO, and Change Commodity Code. A 'Go' button is next to the dropdown. A table of line items is shown below, with checkboxes in the 'Unit' column. A '2.' in a box points to the dropdown menu, and a '1.' in a box points to the 'Go' button.

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	<input type="checkbox"/>
2020 Shelby Mustang GT500 Metallic Blue with White Racing Stripes	GT500	EA	73,995.00	1 EA	73,995.00 USD	<input type="checkbox"/>
Black Rugged Floor Mats	MATS	EA	49.00	4 EA	196.00 USD	<input type="checkbox"/>

Supplier subtotal: 74,191.00 USD
Subtotal: 74,191.00
Shipping: 0.00
Handling: 0.00
Total: 74,191.00 USD

Important Note: This feature will allow requisitioners and approvers to change the supplier on multiple line items for draft carts and requisitions in one step. This option cannot be used on hosted, punch-out, or contract non-catalog items.

1. Select the check box in the column header to **select all line items**.
2. Click **For Selected line items** drop down box and select **Change Supplier**.

The screenshot shows the same 'Shopping Cart' interface as above. The dropdown menu for 'For selected line items' is now closed, and the text 'Change Supplier' is visible in the dropdown area. A '3.' in a box points to the 'Go' button.

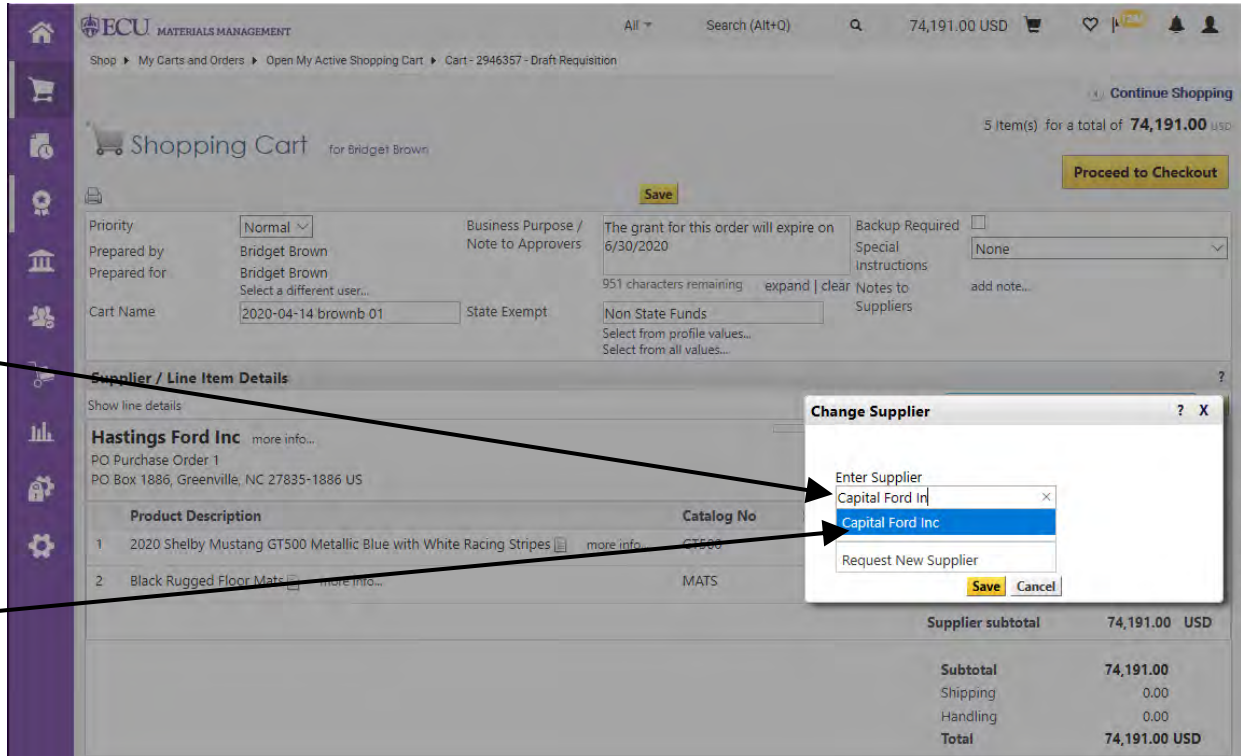
Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	<input type="checkbox"/>
2020 Shelby Mustang GT500 Metallic Blue with White Racing Stripes	GT500	EA	73,995.00	1 EA	73,995.00 USD	<input type="checkbox"/>
Black Rugged Floor Mats	MATS	EA	49.00	4 EA	196.00 USD	<input type="checkbox"/>

Supplier subtotal: 74,191.00 USD
Subtotal: 74,191.00
Shipping: 0.00
Handling: 0.00
Total: 74,191.00 USD

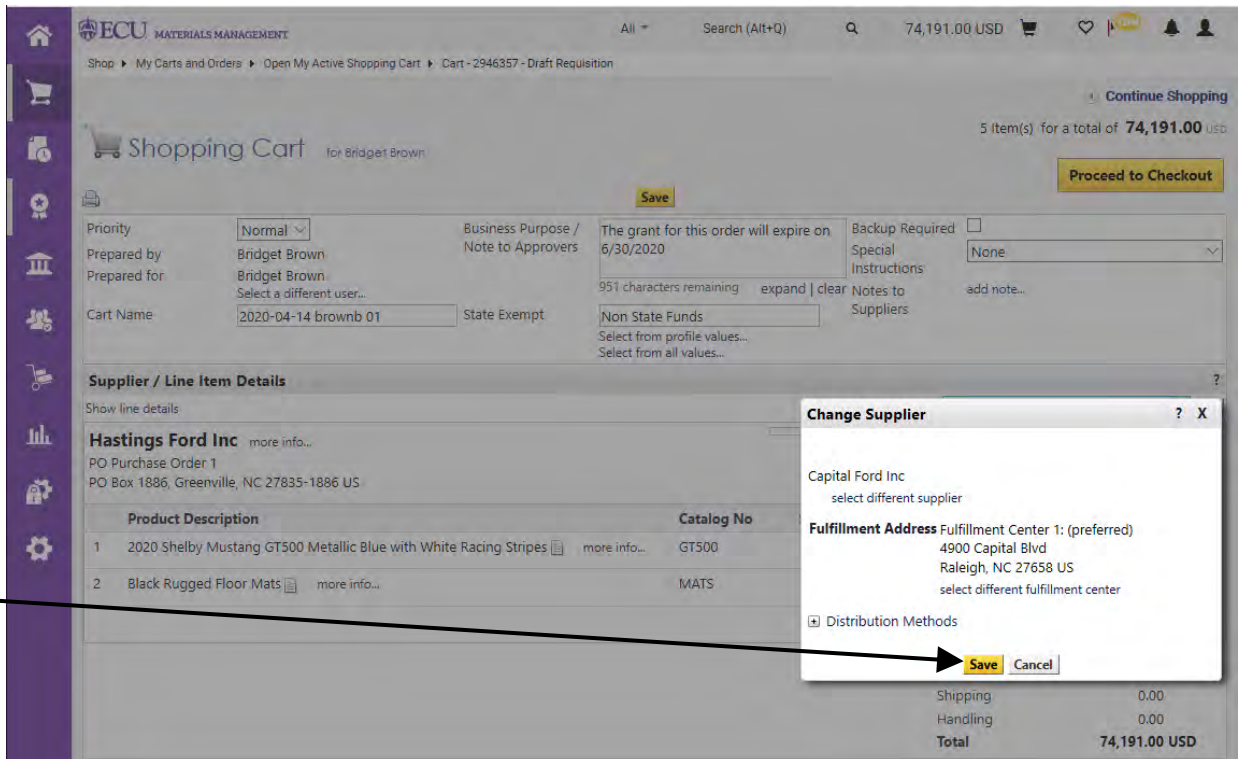
3. Click **Go** button to change supplier for all items.

CHANGE SUPPLIER ACTION

Last Updated on: 4/14/2020



4. Enter the name of the new supplier in the **Enter Supplier** search field of the **Change Supplier** pop up.
5. Select the desired supplier name.



6. Click the **Save** button.

CHANGE SUPPLIER ACTION

Last Updated on: 4/14/2020

The screenshot displays the 'Shopping Cart' interface for user 'Bridget Brown'. The cart contains 5 items with a total value of 74,191.00 USD. The 'Supplier / Line Item Details' section shows the supplier name 'Capital Ford Inc' and its fulfillment center address: '4900 Capital Blvd, Raleigh, NC 27658 US'. A table lists the items in the cart:

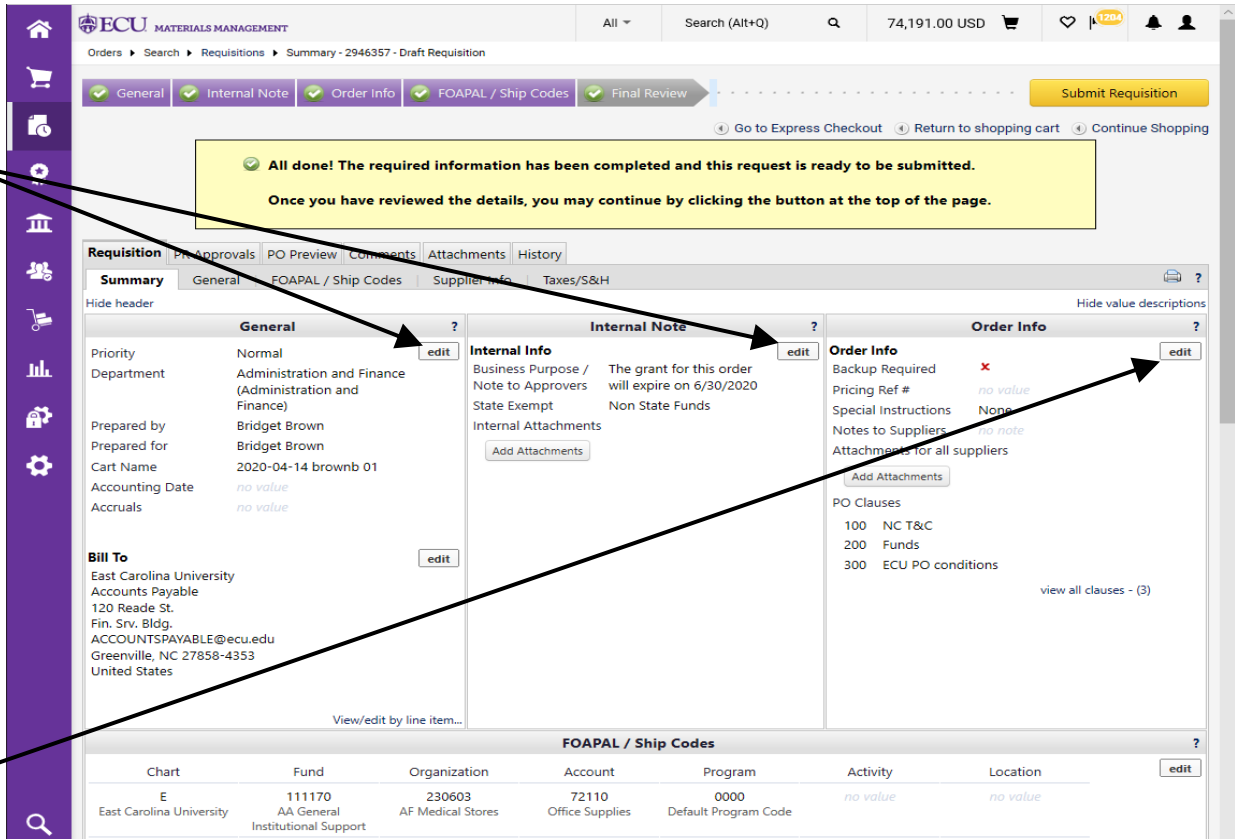
Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
2020 Shelby Mustang GT500 Metallic Blue with White Racing Stripes	GT500	EA	73,995.00	1 EA	73,995.00 USD
Black Rugged Floor Mats	MATS	EA	49.00	4 EA	196.00 USD

The summary at the bottom of the cart shows a 'Supplier subtotal' of 74,191.00 USD, a 'Subtotal' of 74,191.00, and a 'Total' of 74,191.00 USD. A callout box labeled '7.' points to the 'Capital Ford Inc' supplier name.

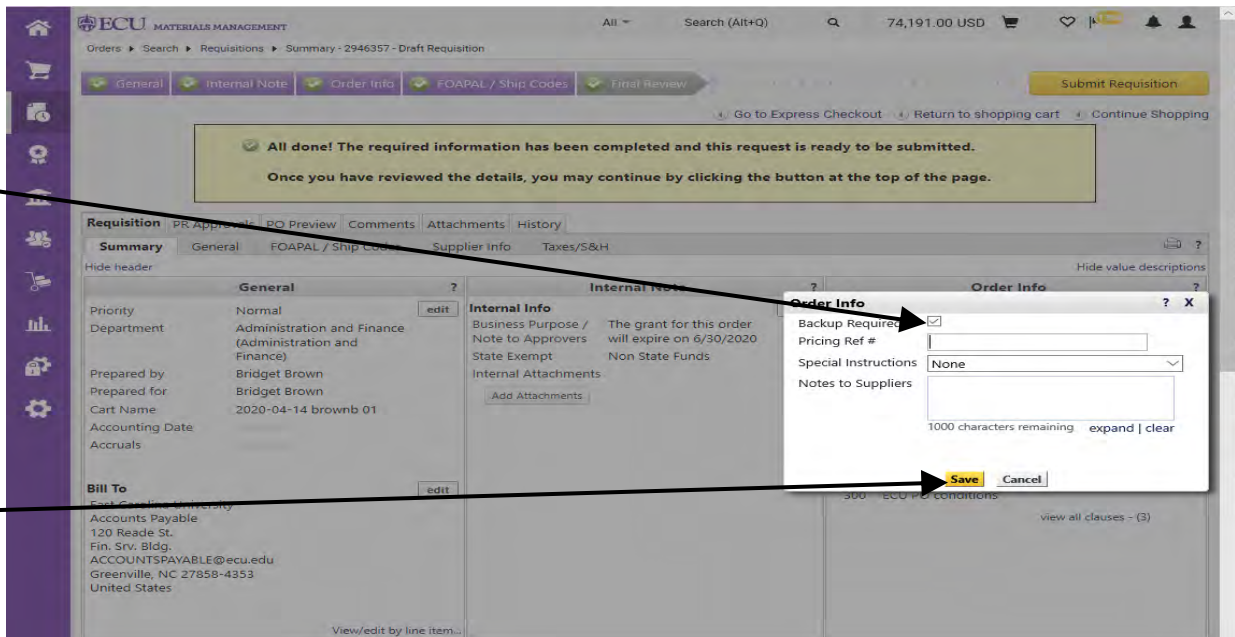
7. The new supplier name is now displayed on the cart / requisition.
8. This completes the steps for the **Change Supplier Action**. See the **Review** procedures to continue the cart review process.

REVIEW CART HEADER

Last Updated on: 4/14/2020



1. To make changes in the Header, click on the corresponding **edit** button in the following sections: **General, Internal Note, or Order Info.**
2. In this example, we will change the **Backup Required** flag to Yes by clicking on the **edit** link in the Order Info section. **Note:** The red **X** indicates that no backup is required for this order.



3. Click on the **Backup Required** check box to indicate that backup documentation is required by the supplier.
4. Click on the **Save** button to save your change.

REVIEW CART HEADER

Last Updated on: 4/14/2020

The screenshot shows the 'Final Review' step of a requisition. A yellow message box at the top states: "All done! The required information has been completed and this request is ready to be submitted. Once you have reviewed the details, you may continue by clicking the button at the top of the page." Below this, the 'Order Info' tab is active, showing a green checkmark next to 'Backup Required'. The 'Internal Note' tab is also visible, with an 'edit' button next to it. A vertical sidebar on the left contains various icons, with a box labeled '5.' pointing to the 'Order Info' tab and a box labeled '6.' pointing to the 'Internal Note' 'edit' button.

- 5. The green check mark now indicates that backup is required by the supplier.
- 6. To add to or edit the **Internal Note** click the **edit** button.

The screenshot shows the 'Internal Info' dialog box open over the 'Internal Note' tab. The dialog box contains the following text: "Business Purpose / Note to Approvers: The grant for this order will expire on 6/30/2020. Total funds allotted in grant are less than requisition total. 836 characters remaining expand | clear". Below the text is a "State Exempt" dropdown menu set to "Non State Funds". At the bottom of the dialog are "Save" and "Cancel" buttons. A box labeled '7.' points to the text area, and a box labeled '8.' points to the "Save" button.

- 7. Add to or edit the text for the **Business Purpose / Note to Approvers**.
- 8. Click the **Save** button.

REVIEW CART HEADER

Last Updated on: 4/14/2020

9.

All done! The required information has been completed and this request is ready to be submitted.
Once you have reviewed the details, you may continue by clicking the button at the top of the page.

Submit Requisition

Go to Express Checkout Return to shopping cart Continue Shopping

Requisition PR Approvals PO Preview Comments Attachments History

Summary General FOAPAL / Ship Codes Supplier Info Taxes/S&H

Hide value descriptions

General	Internal Note	Order Info
General <input type="button" value="edit"/>	Internal Info <input type="button" value="edit"/>	Order Info <input type="button" value="edit"/>
Priority: Normal	Business Purpose / Note to Approver: The grant for this order will expire on 6/30/2020. Total funds allotted in grant are less than re... more...	Backup Required: <input checked="" type="checkbox"/>
Department: Administration and Finance (Administration and Finance)	State Exempt: Non State Funds	Pricing Ref #: no value
Prepared by: Bridget Brown	Internal Attachments: <input type="button" value="Add Attachments"/>	Special Instructions: None
Prepared for: Bridget Brown		Notes to Suppliers: no note
Cart Name: 2020-04-14 brownb 01		Attachments for all suppliers: <input type="button" value="Add Attachments"/>
Accounting Date: no value		PO Clauses: 100 NC T&C, 200 Funds, 300 ECU PO conditions
Accruals: no value		<input type="button" value="view all clauses - (3)"/>
Bill To <input type="button" value="edit"/>		
East Carolina University Accounts Payable 120 Reade St. Fin. Srv. Bldg. ACCOUNTSPAYABLE@ecu.edu Greenville, NC 27858-4353 United States		

View/edit by line item...

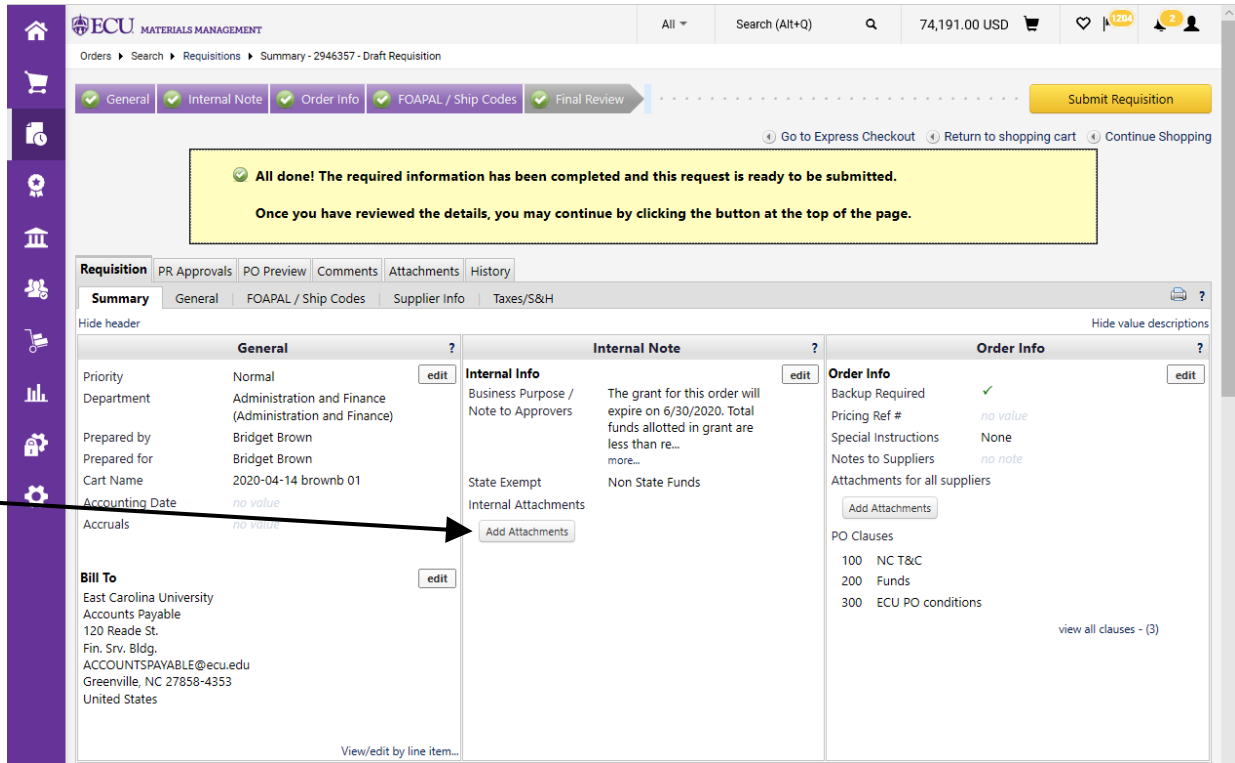
Chart	Fund	Organization	Account	Program	Activity	Location
E	111170	230603	72110	0000	no value	no value
East Carolina University	AA General Institutional Support	AF Medical Stores	Office Supplies	Default Program Code		

9. Note the Note to Approvers has been modified.

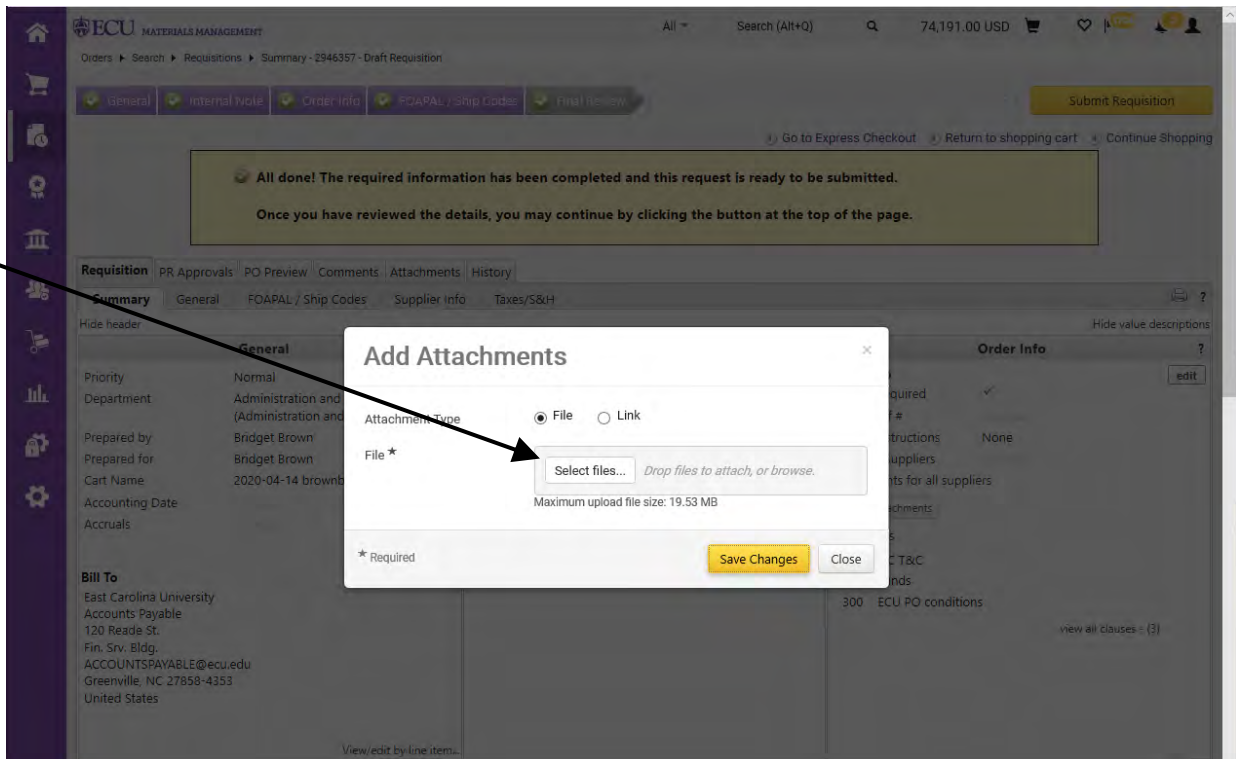
10. To edit the FOAPAL at the Header continue to the **FOAPAL EDIT AT HEADER** procedure.

ATTACHMENTS

Last Updated on: 4/15/2020



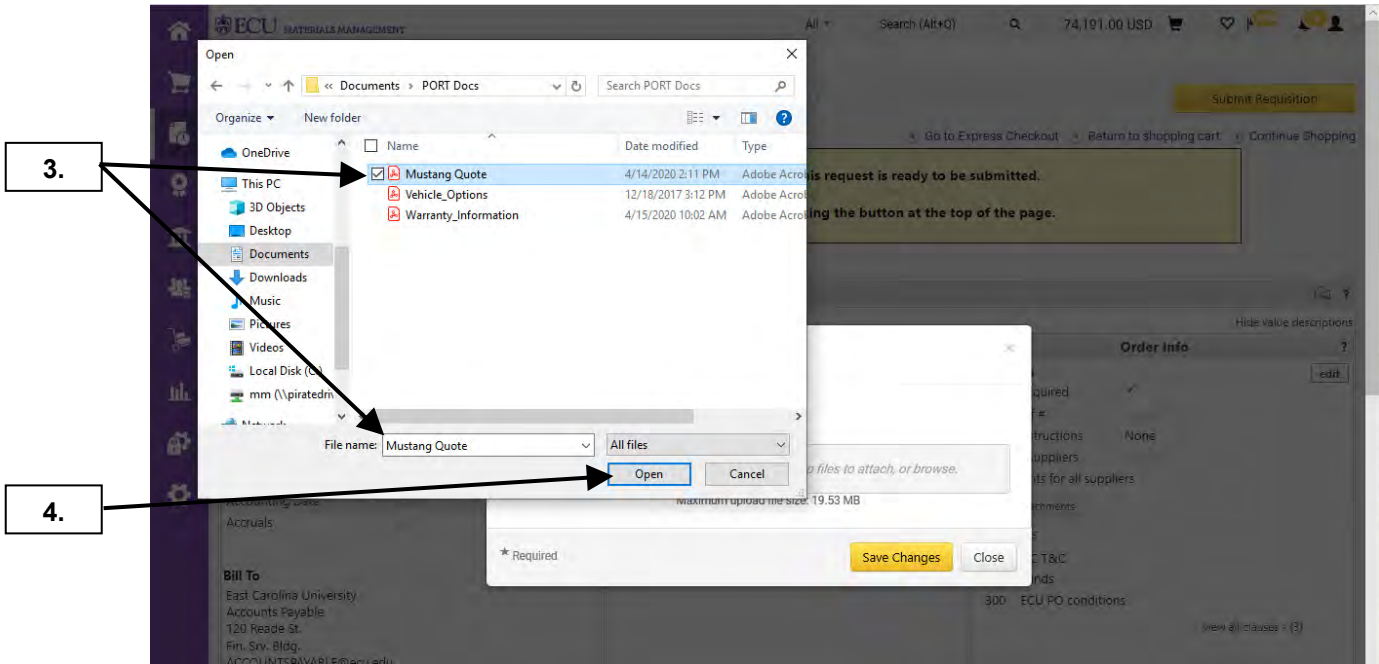
1. To add an attachment, click the **Add Attachment** button.
Note: These steps are the same for **Attachments for all suppliers**.



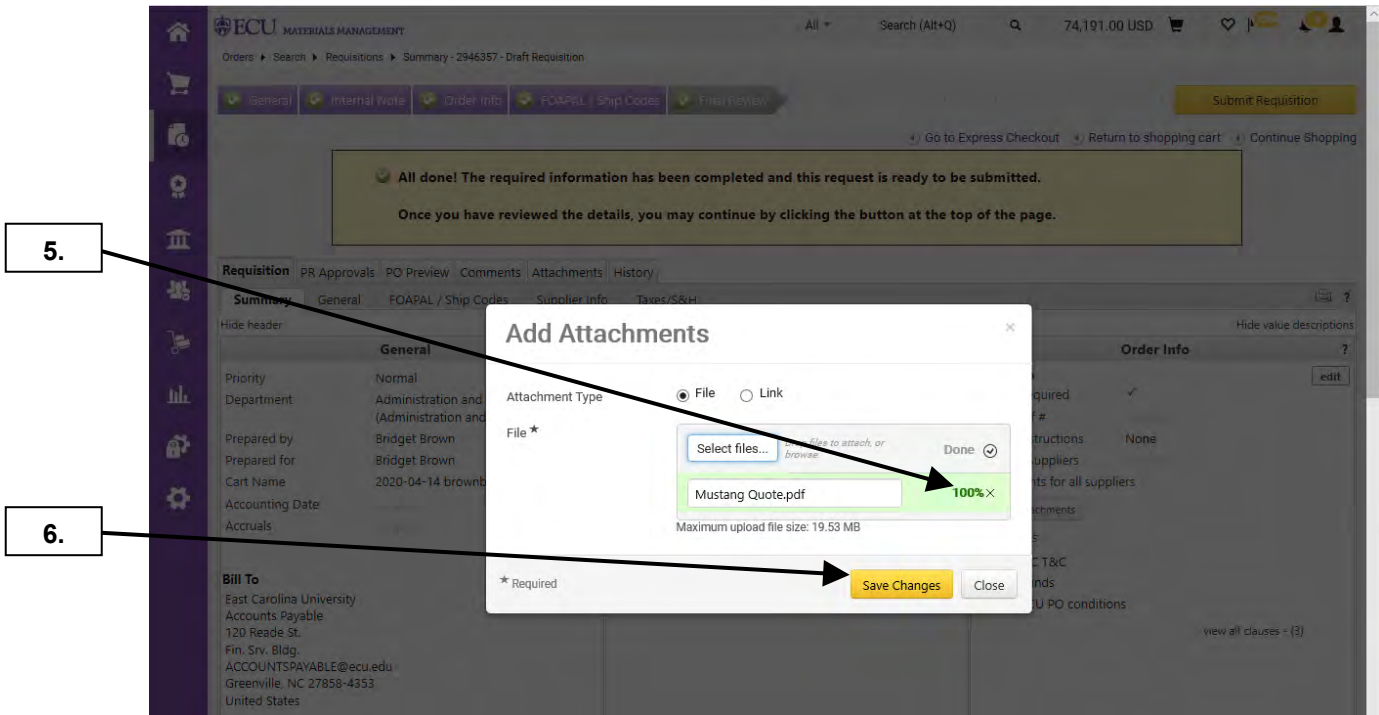
2. Click **Select files** button to navigate to an electronic file on your computer or network drive.
Note: You can attach a file in any of the following formats: Word, Excel, Note Pad, PDF, JPG, and TIFF.

ATTACHMENTS

Last Updated on: 4/15/2020



3. A file manager window will pop up. Navigate to the location of the file you need to attach and select it.
4. Click **Open** button.



5. Notice file upload status.
6. Click **Save Changes** button.

ATTACHMENTS

Last Updated on: 4/15/2020

The screenshot shows the ECU Materials Management interface for a requisition. A yellow notification box at the top states: "All done! The required information has been completed and this request is ready to be submitted. Once you have reviewed the details, you may continue by clicking the button at the top of the page." Below this, the requisition details are displayed in a table with three main sections: General, Internal Note, and Order Info. In the Internal Note section, under "Internal Attachments", a document named "Mustang Quote.pdf" is listed with a "Remove" dropdown arrow next to it. A box labeled "7." has an arrow pointing to the "Mustang Quote.pdf" entry. A box labeled "8." has an arrow pointing to the "Remove" dropdown arrow.

General	Internal Note	Order Info
Priority Normal	Internal Info Business Purpose / Note to Approvers	Order Info Backup Required ✓
Department Administration and Finance (Administration and Finance)	The grant for this order will expire on 6/30/2020. Total funds allotted in grant are less than re... more...	Pricing Ref # <i>no value</i>
Prepared by Bridget Brown	State Exempt Non State Funds	Special Instructions None
Prepared for Bridget Brown	Internal Attachments	Notes to Suppliers <i>no note</i>
Cart Name 2020-04-14 brownb 01	Add Attachments	Attachments for all suppliers Add Attachments
Accounting Date <i>no value</i>	Mustang Quote.pdf Remove	PO Clauses 100 NC T&C 200 Funds 300 ECU PO conditions
Accruals <i>no value</i>		view all clauses - (3)

- 7. Notice that document has been successfully attached.
- 8. Click on **Remove** drop down for listing of options.

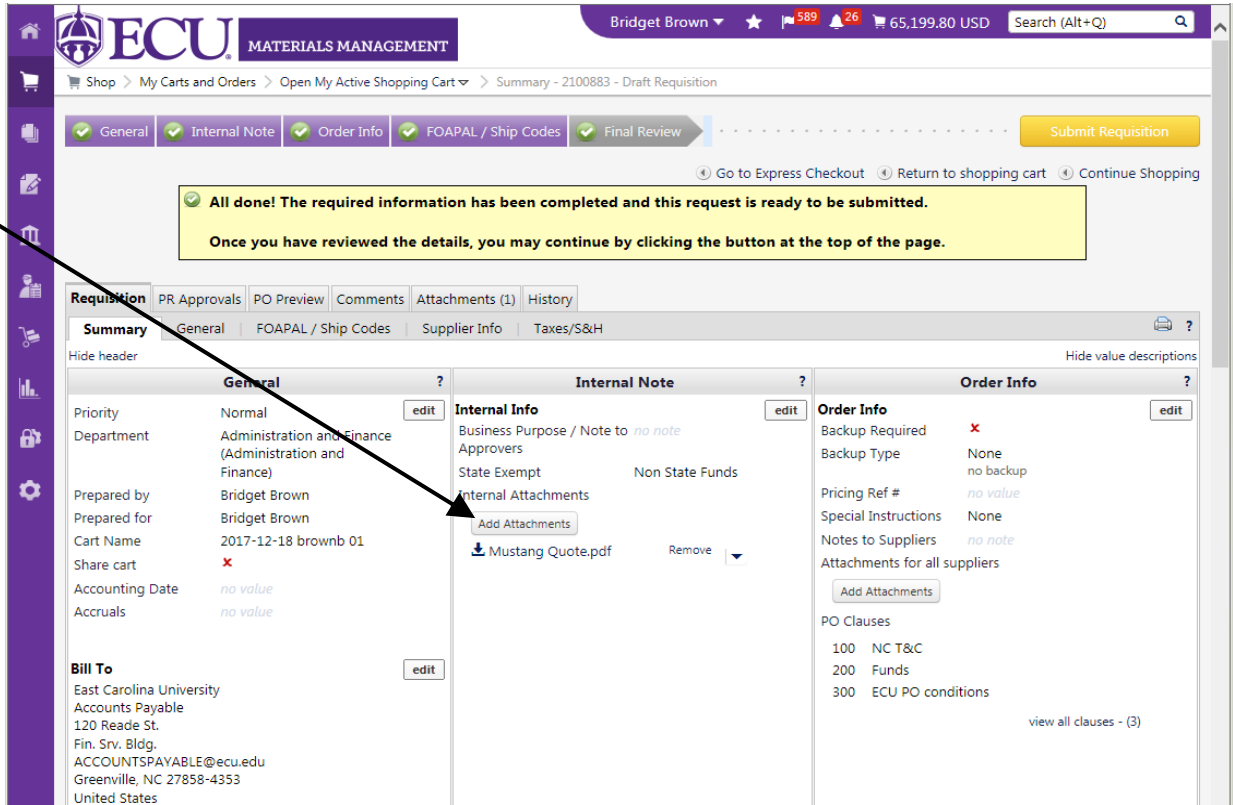
This screenshot is identical to the previous one, but the "Remove" dropdown menu is open, showing two options: "Remove" and "Move to External Attachments". A box labeled "9." has an arrow pointing to the "Remove" option in the dropdown menu.

General	Internal Note	Order Info
Priority Normal	Internal Info Business Purpose / Note to Approvers	Order Info Backup Required ✓
Department Administration and Finance (Administration and Finance)	The grant for this order will expire on 6/30/2020. Total funds allotted in grant are less than re... more...	Pricing Ref # <i>no value</i>
Prepared by Bridget Brown	State Exempt Non State Funds	Special Instructions None
Prepared for Bridget Brown	Internal Attachments	Notes to Suppliers <i>no note</i>
Cart Name 2020-04-14 brownb 01	Add Attachments	Attachments for all suppliers Add Attachments
Accounting Date <i>no value</i>	Mustang Quote.pdf Remove	PO Clauses 100 NC T&C 200 Funds 300 ECU PO conditions
Accruals <i>no value</i>		view all clauses - (3)

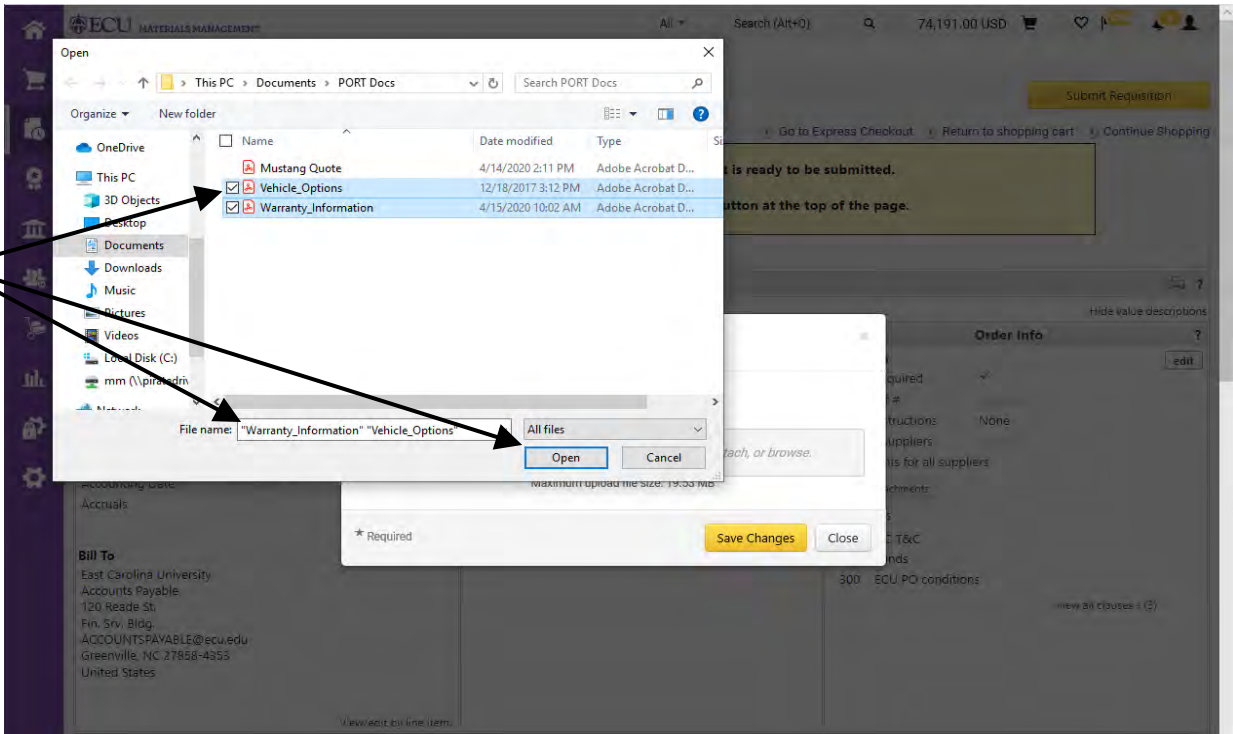
- 9. You can either **Remove** or **Move to External Attachments** with one click.

ATTACHMENTS

Last Updated on: 4/15/2020



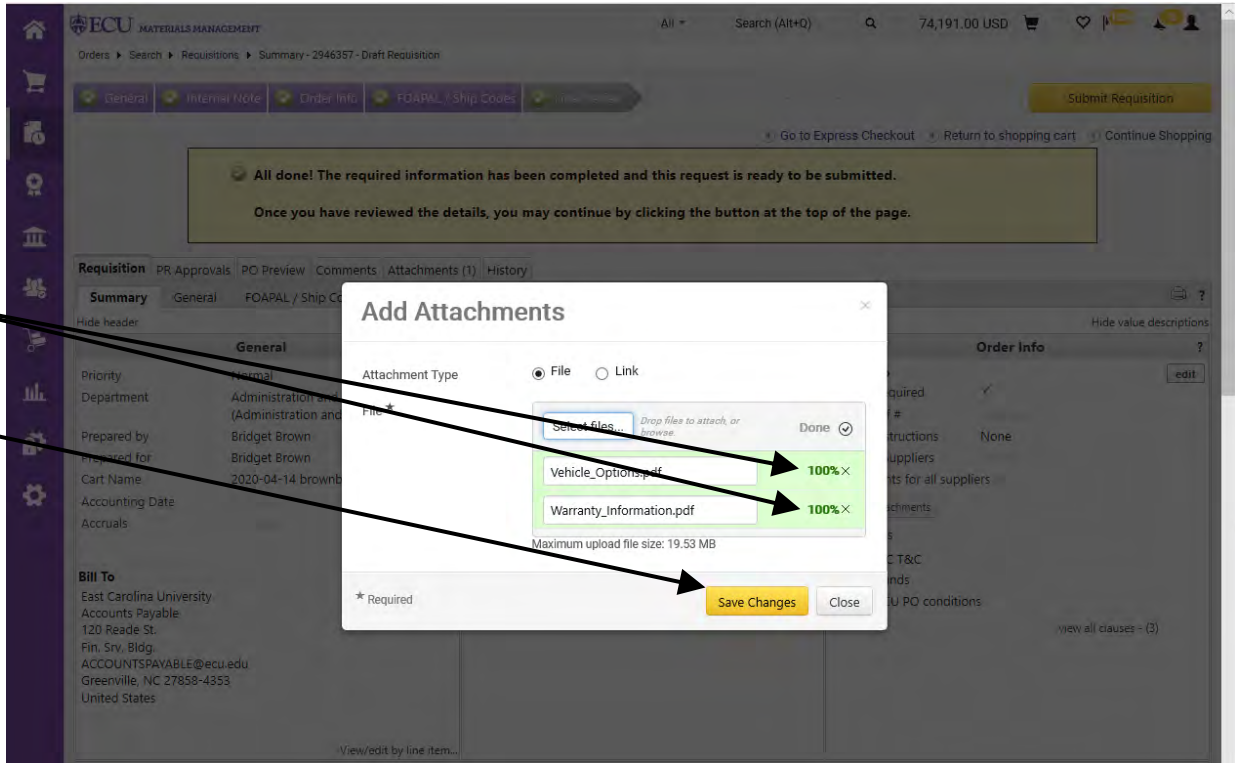
10. To add multiple documents at one time, repeat steps 1 - 2 by clicking on the **Add Attachments** then **Select files** buttons.



11. Select multiple files to upload from the file manager window and click the **Open** button. Use the Firefox browser for drop-and-drag features.

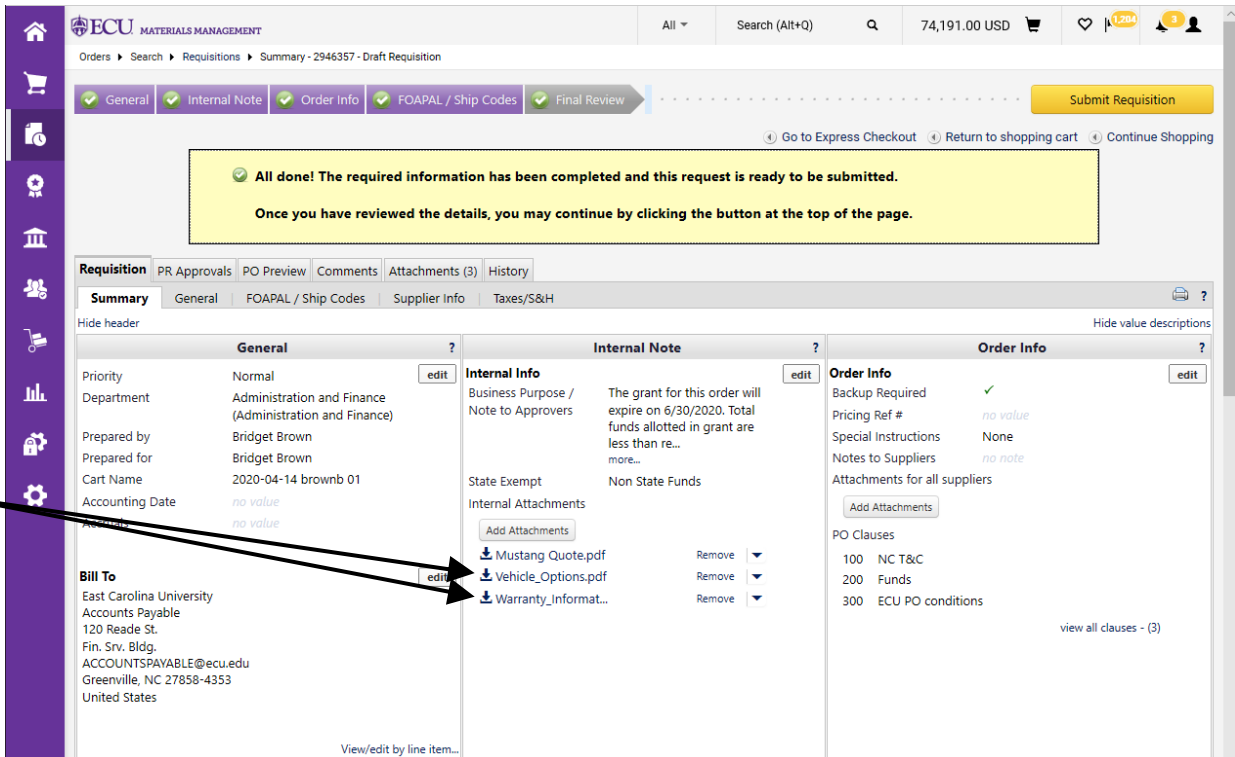
ATTACHMENTS

Last Updated on: 4/15/2020



12. Notice status of files uploaded to PORT.

13. Click on the **Save Changes** button.

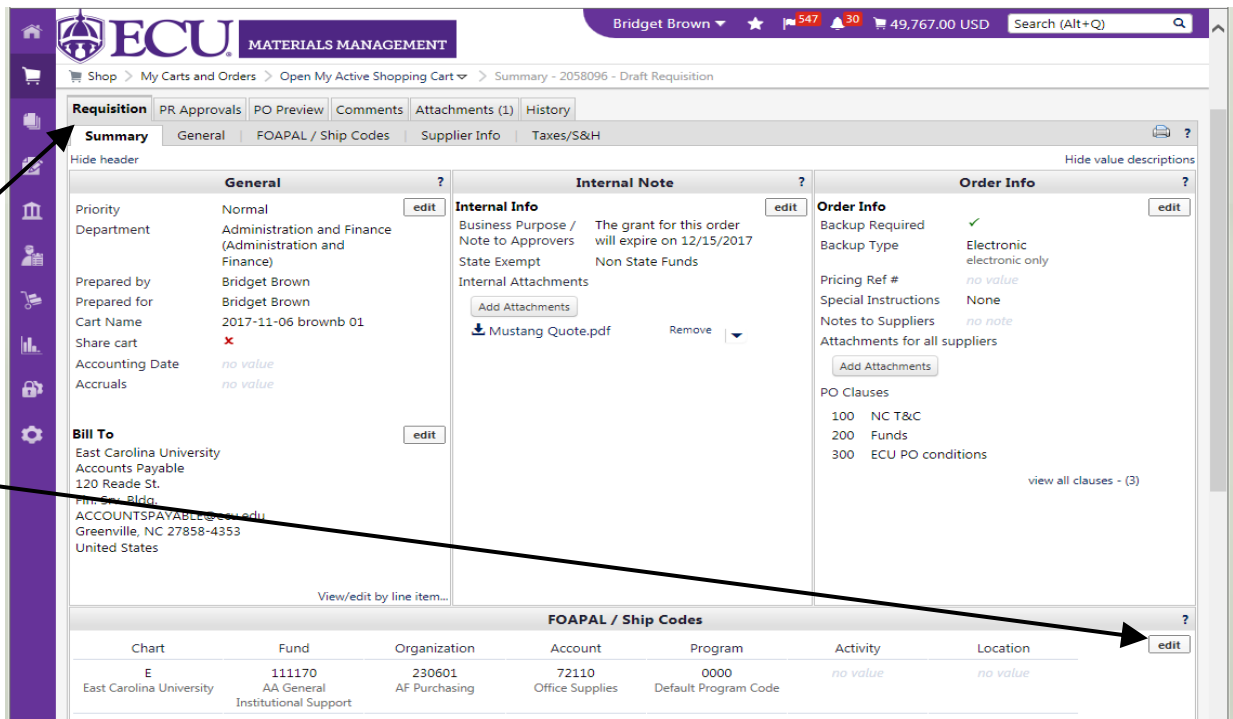


14. Notice the attachments are added to the shopping cart.

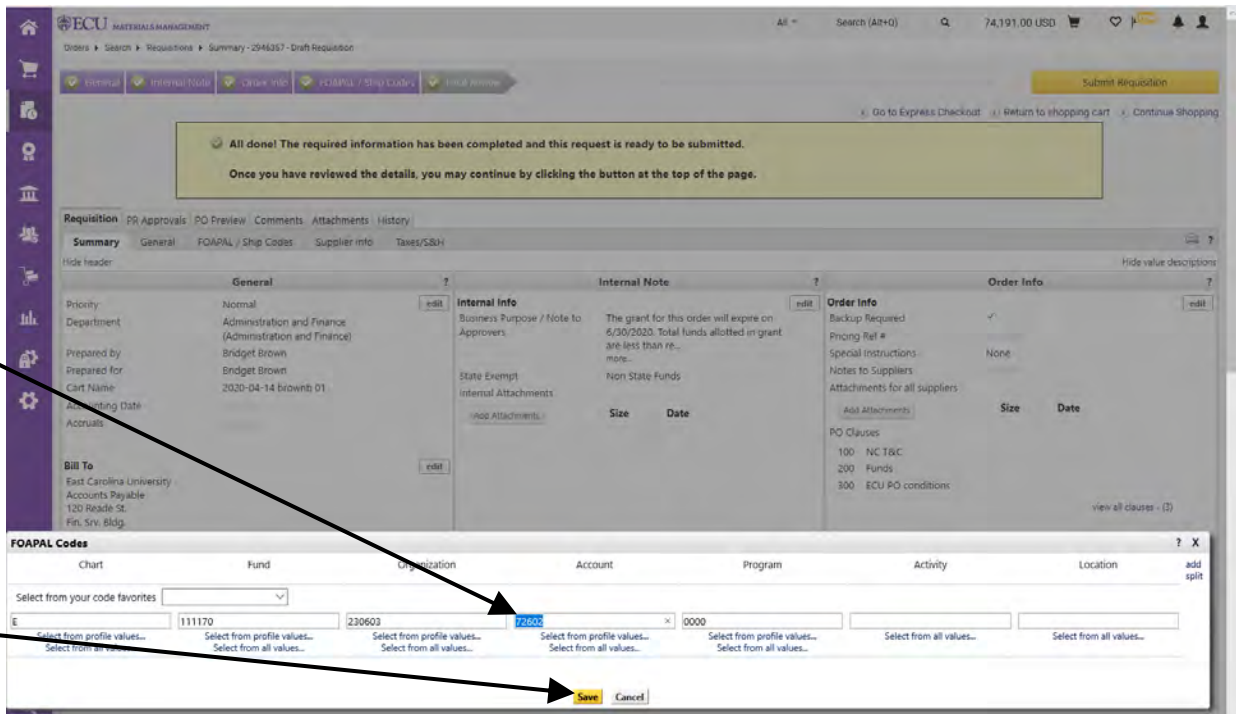
15. This completes all attachment edits. See the **Review Cart Items** procedure to continue the review process.

FOAPAL EDIT AT HEADER

Last Updated on: 4/14/2020



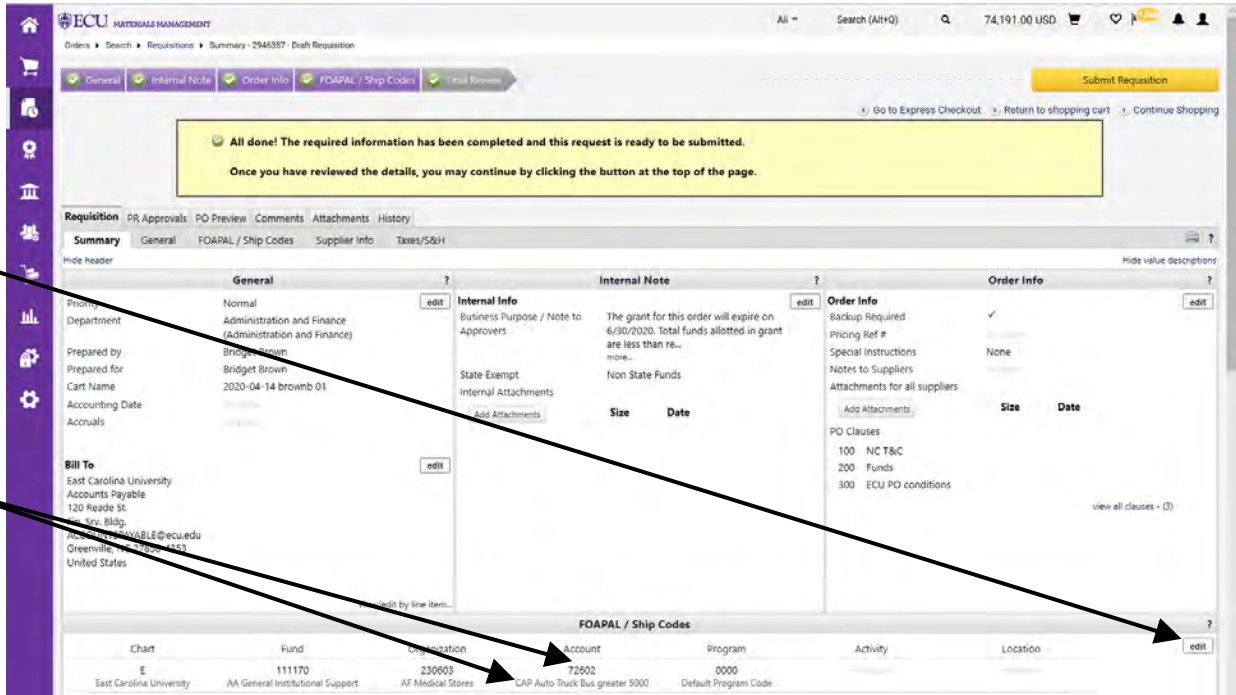
1. Navigate to the **FOAPAL / Ship Codes** section on the **Summary** tab of your draft requisition to make document level changes for FOAPAL codes.
2. To make FOAPAL changes at the document level (every line item), click the **edit** button.



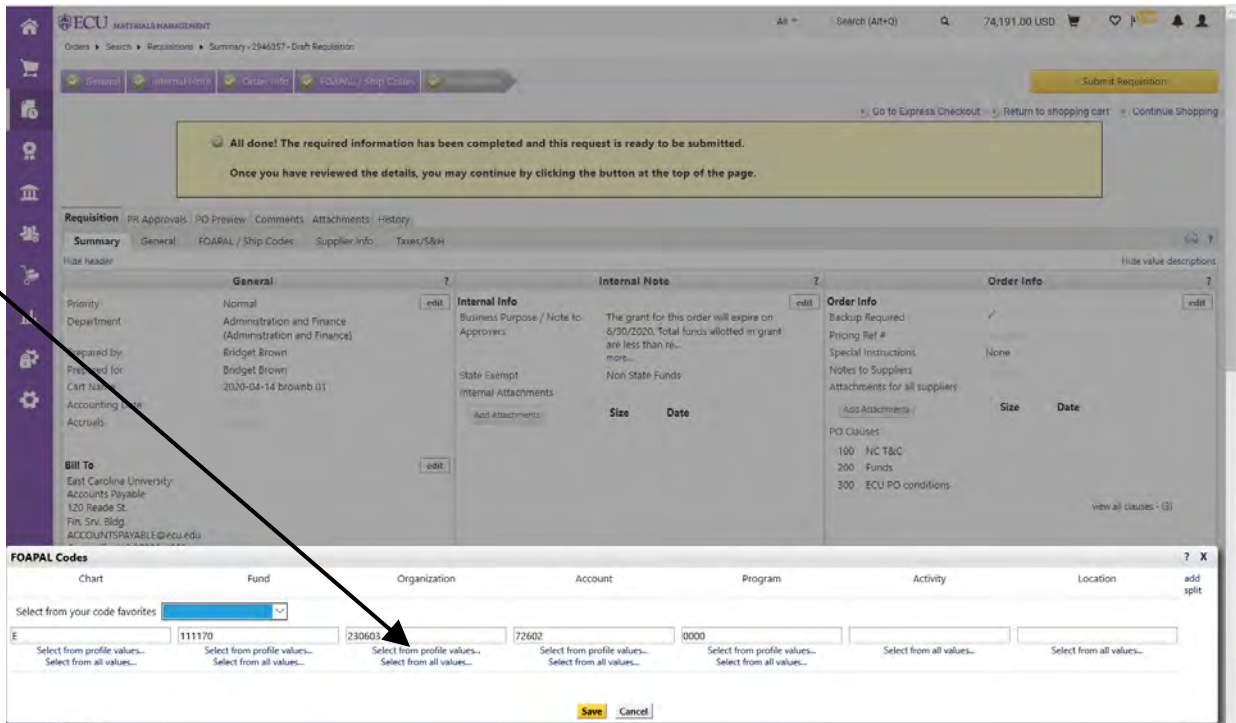
3. The steps for changing FOAPAL values are the same for each element of the FOAPAL string. In the first example, we will enter the correct **Account** code for the items on the order. Type the correct value in the Account field.
Note: You may need to expand your browser window to view all FOAPAL values.
4. Click the **Save** button to make your changes.

FOAPAL EDIT AT HEADER

Last Updated on: 4/14/2020



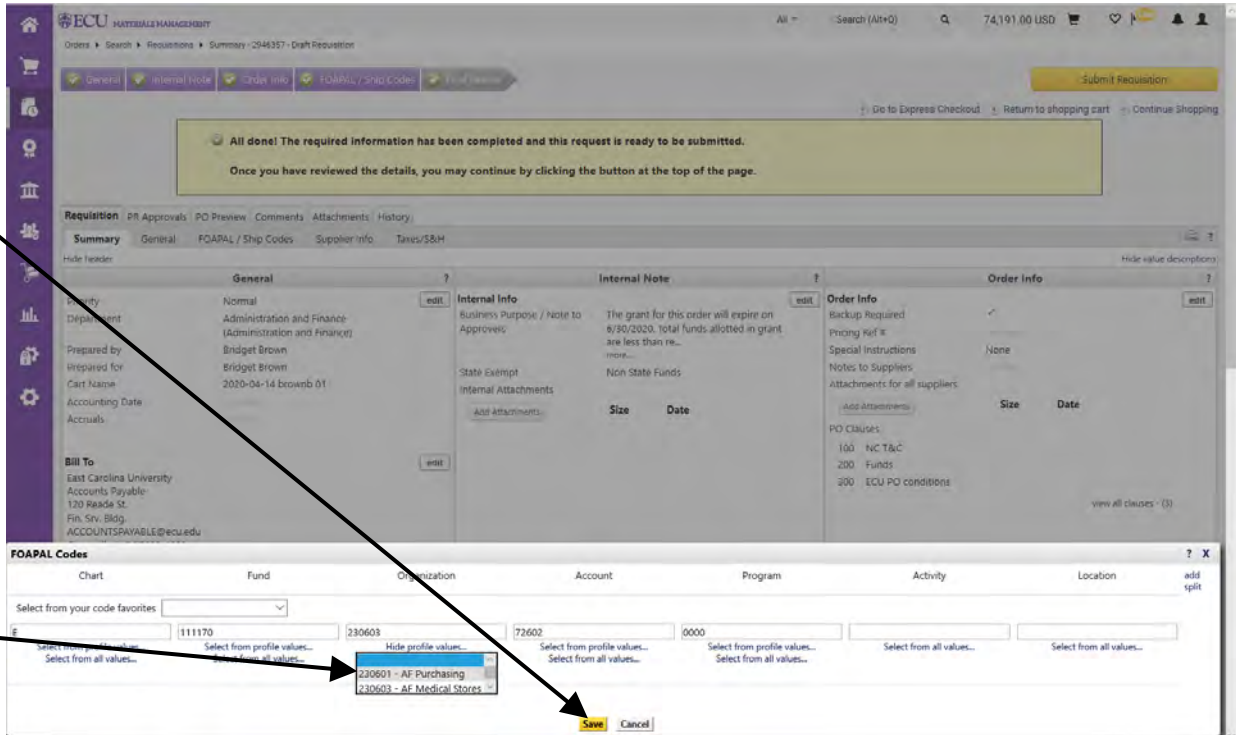
- 5. Notice the **Account** value and description have been updated.
- 6. In the 2nd example, we will select a FOAPAL value from our saved profile values. Click the **edit** button.



- 7. Click the **Select from profile values...** link to display a list of previously saved values from your profile.

FOAPAL EDIT AT HEADER

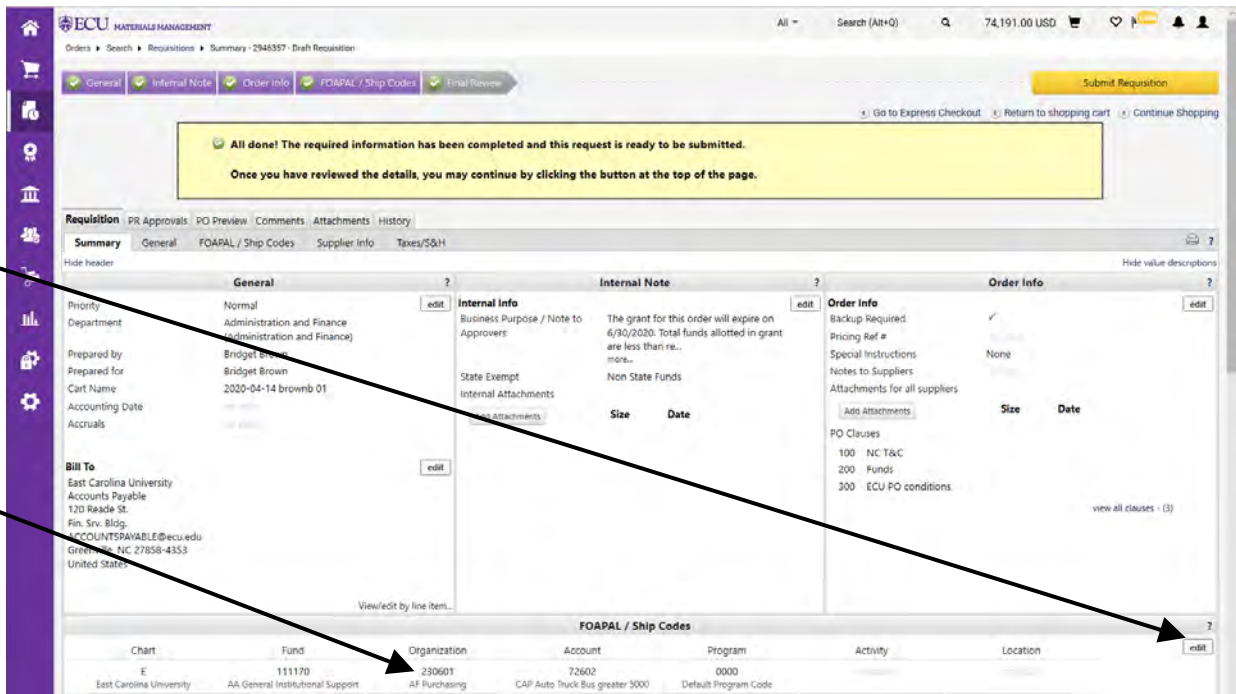
Last Updated on: 4/14/2020



8.

9.

8. Click the appropriate value from your profile.
9. Click the **Save** button to make your change.



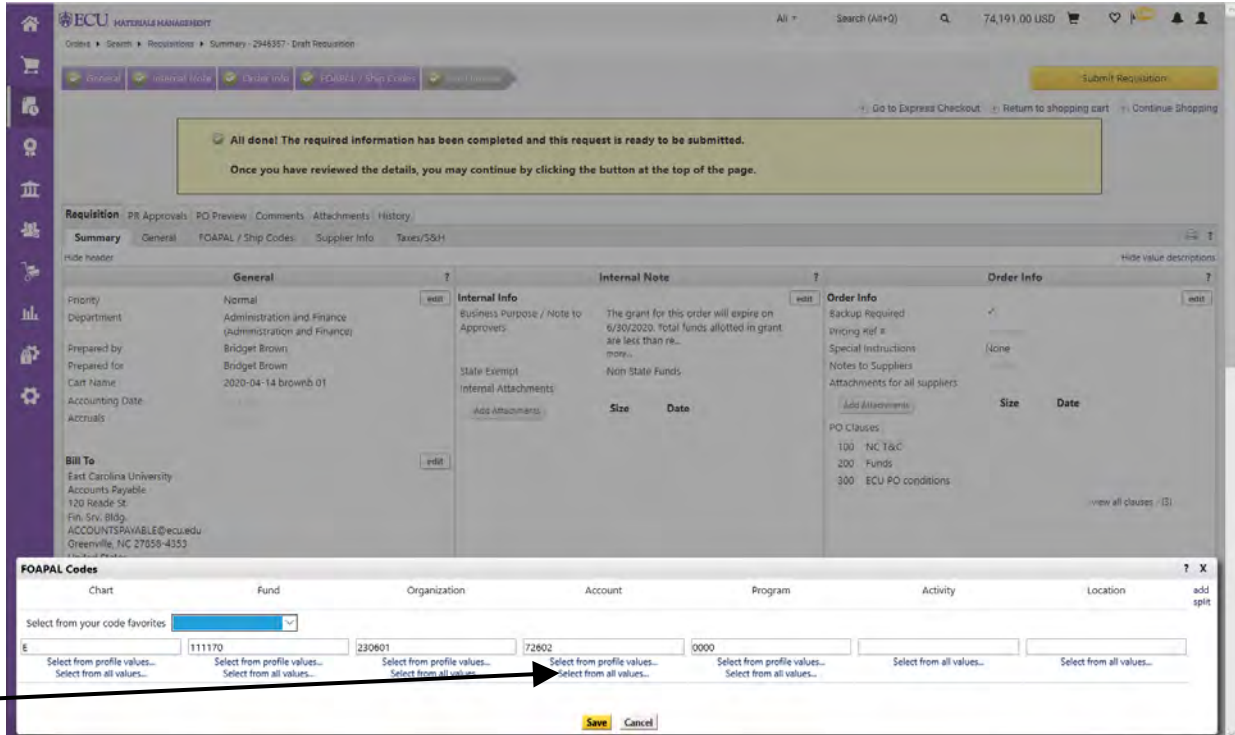
11.

10.

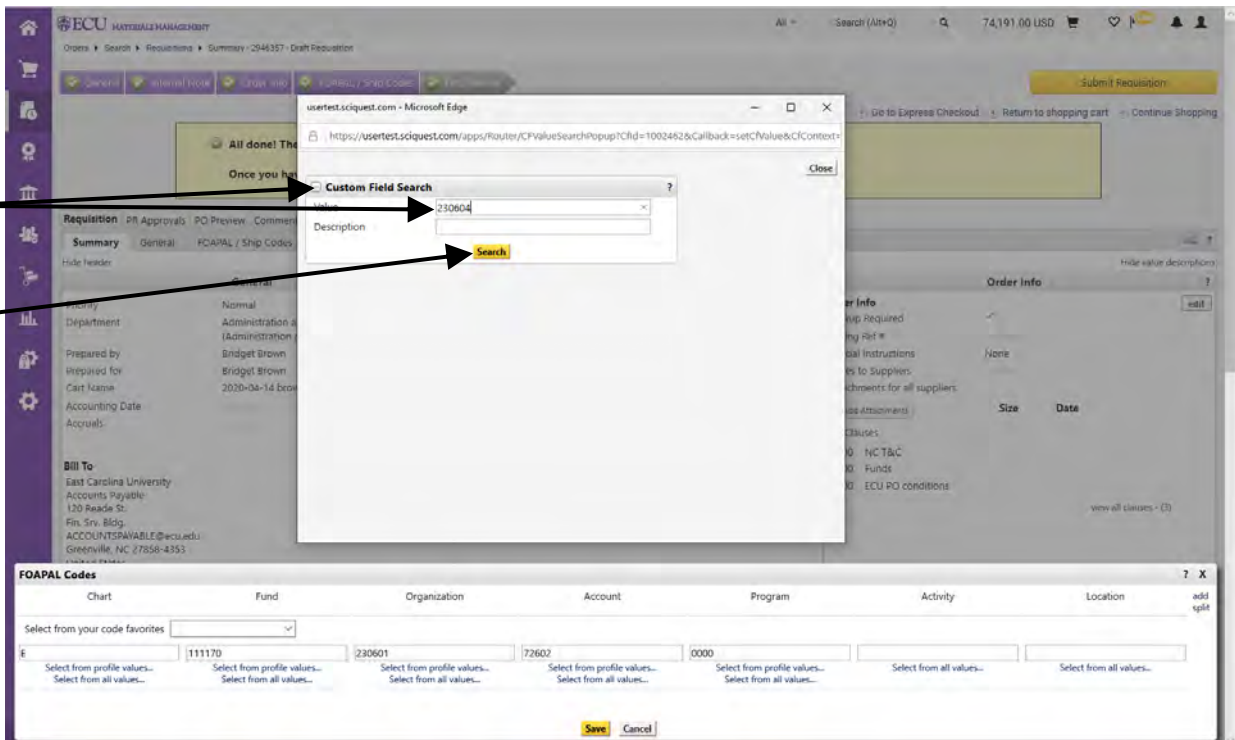
10. Notice the Organization value and description have been updated.
11. The change that was just completed demonstrates how to search for a value on your profile. Now we are going to search for all Organization values to find one that does not exist on your profile. Click on the **edit** button.

FOAPAL EDIT AT HEADER

Last Updated on: 4/14/2020



12. Click on the **Select from all values** link.

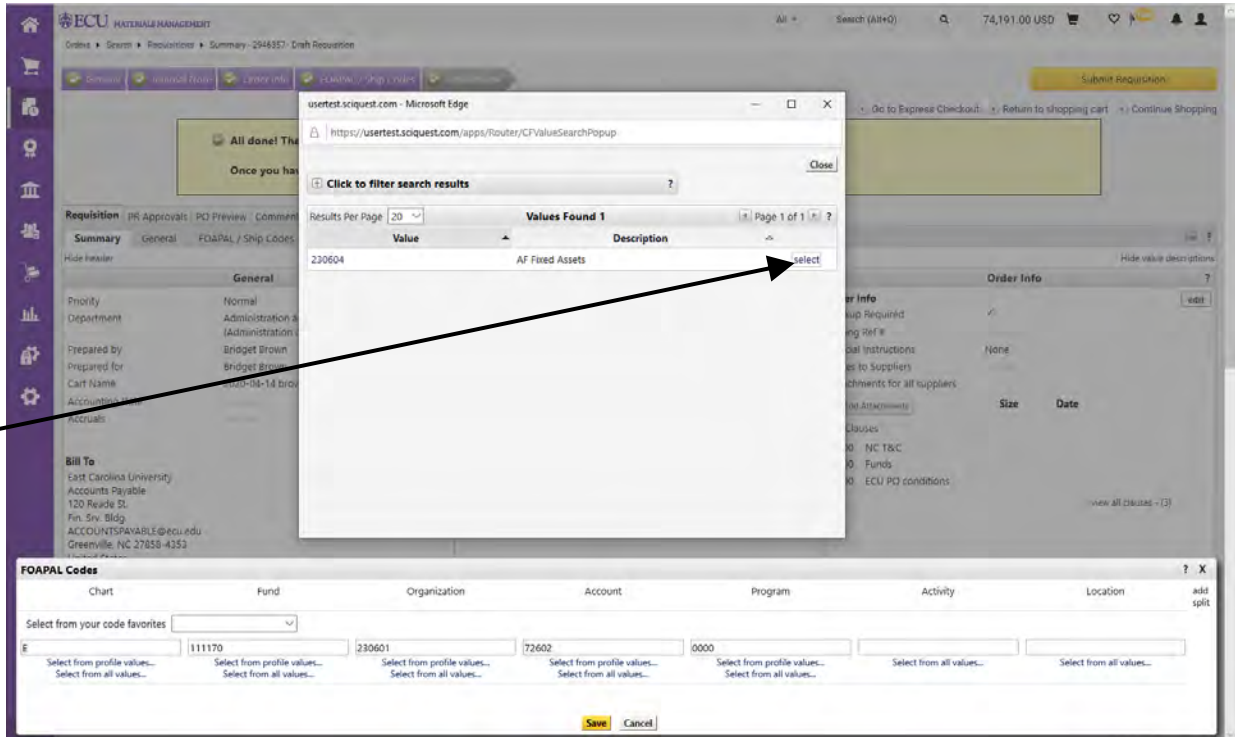


13. This brings up the **Custom Field Search** window. Type in an Organization value that does not exist on your profile.

14. Click **Search** button.

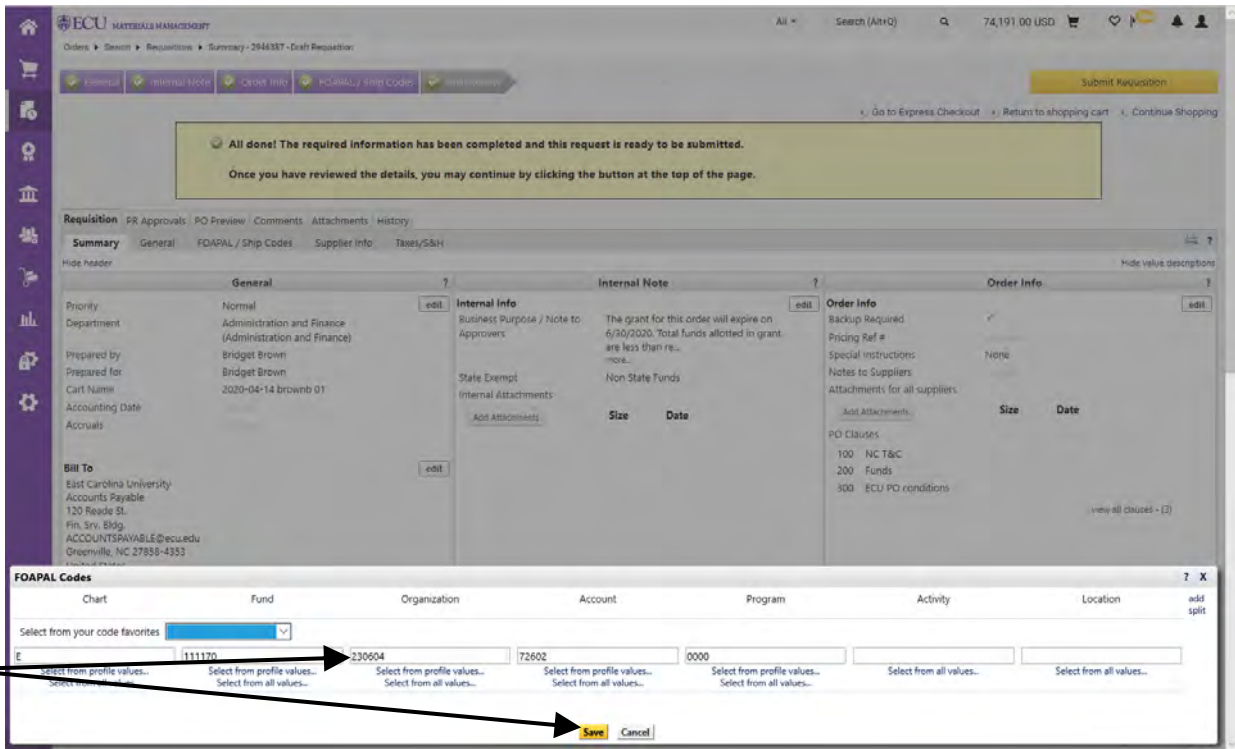
FOAPAL EDIT AT HEADER

Last Updated on: 4/14/2020



15.

15. Click the **select** link.



16.

16. The new value is displayed. Click the **Save** button.

FOAPAL EDIT AT HEADER

Last Updated on: 4/14/2020

The screenshot shows the ECU Materials Management interface. At the top, there's a navigation bar with 'Orders', 'Search', 'Requisitions', and 'Summary - 2946357 - Draft Requisition'. A yellow message box states: 'All done! The required information has been completed and this request is ready to be submitted. Once you have reviewed the details, you may continue by clicking the button at the top of the page.' Below this, there are tabs for 'Summary', 'General', 'FOAPAL / Ship Codes', 'Supplier Info', and 'Taxer/S&H'. The 'General' tab is active, showing fields for Priority, Department, Prepared by, Cart Name, and Accounting Date. The 'Internal Note' tab shows business purpose and state exempt information. The 'Order Info' tab shows backup required, pricing, and PO clauses. At the bottom, the 'FOAPAL / Ship Codes' section contains a table with columns for Chart, Fund, Organization, Account, Program, Activity, and Location. An arrow from a box labeled '17.' points to the 'Organization' field in this table, which currently shows 'AF Fixed Assets'.

Chart	Fund	Organization	Account	Program	Activity	Location
E	111170	AF Fixed Assets	72602	0000		

17. The Organization value has changed. **Note:** These steps are the same for each element.
18. To split FOAPAL codes at the header level see the procedure **HEADER SPLIT - % OF PRICE.**

FOAPAL SPLIT – % OF PRICE AT HEADER

Last Updated on: 4/15/2020

ECU MATERIALS MANAGEMENT | All | Search (Alt+Q) | 74,191.00 USD | 1,204 | 2

Shop > My Carts and Orders > Open My Active Shopping Cart > Cart - 2946357 - Draft Requisition

Continue Shopping

Shopping Cart for Bridget Brown | 5 Item(s) for a total of 74,191.00 USD

Proceed to Checkout

Save

Priority: Normal | Business Purpose / Note to Approvers: The grant for this order will expire on 6/30/2020. Total funds allotted in grant are less than requisition total. | Backup Required: | Special Instructions: None

Prepared by: Bridget Brown | Prepared for: Bridget Brown | Cart Name: 2020-04-14 brownb 01 | State Exempt | Non State Funds

Supplier / Line Item Details

Capital Ford Inc | 4900 Capital Blvd, Raleigh, NC 27658 US

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 2020 Shelby Mustang GT500 Metallic Blue with White Racing Stripes	GT500	EA	73,995.00	1 EA	73,995.00 USD
2 Black Rugged Floor Mats	MATS	EA	49.00	4 EA	196.00 USD
Supplier subtotal					74,191.00 USD
Subtotal					74,191.00
Shipping					0.00
Handling					0.00
Total					74,191.00 USD

1. Click on the **Proceed to Checkout** button.

ECU MATERIALS MANAGEMENT | All | Search (Alt+Q) | 74,191.00 USD | 1,204 | 2

Orders > Search > Requisitions > Summary - 2946357 - Draft Requisition

Submit Requisition

Go to Express Checkout | Return to shopping cart | Continue Shopping

All done! The required information has been completed and this request is ready to be submitted. Once you have reviewed the details, you may continue by clicking the button at the top of the page.

Requisition | PR Approvals | PO Preview | Comments | Attachments | History

Summary | General | FOAPAL / Ship Codes | Supplier Info | Taxes/S&H

Hide header | Hide value descriptions

General	Internal Note	Order Info
Priority: Normal Department: Administration and Finance (Administration and Finance) Prepared by: Bridget Brown Prepared for: Bridget Brown Cart Name: 2020-04-14 brownb 01 Accounting Date: no value Accruals: no value	Business Purpose / Note to Approvers: The grant for this order will expire on 6/30/2020. Total funds allotted in grant are less than re... more... State Exempt: Non State Funds Internal Attachments: Add Attachments	Backup Required: <input checked="" type="checkbox"/> Pricing Ref #: no value Special Instructions: None Notes to Suppliers: no note Attachments for all suppliers: Add Attachments PO Clauses: 100 NC T&C, 200 Funds, 300 ECU PO conditions view all clauses - (3)

Bill To: East Carolina University, Accounts Payable, 120 Reade St, Fin. Srv. Bldg, ACCOUNTSPAYABLE@ecu.edu, Greenville, NC 27858-4353, United States

View/edit by line item...

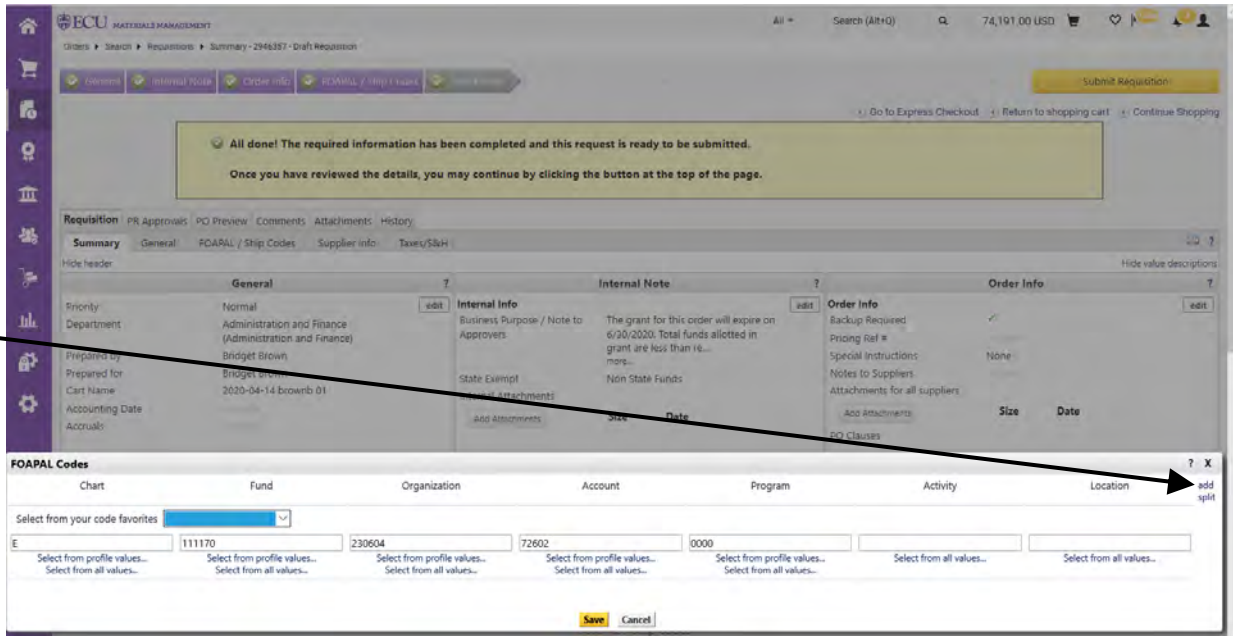
FOAPAL / Ship Codes

Chart	Fund	Organization	Account	Program	Activity	Location
E	111170	230604	72602	0000	no value	no value
East Carolina University	AA General Institutional Support	AF Fixed Assets	CAP Auto Truck Bus greater 5000	Default Program Code		

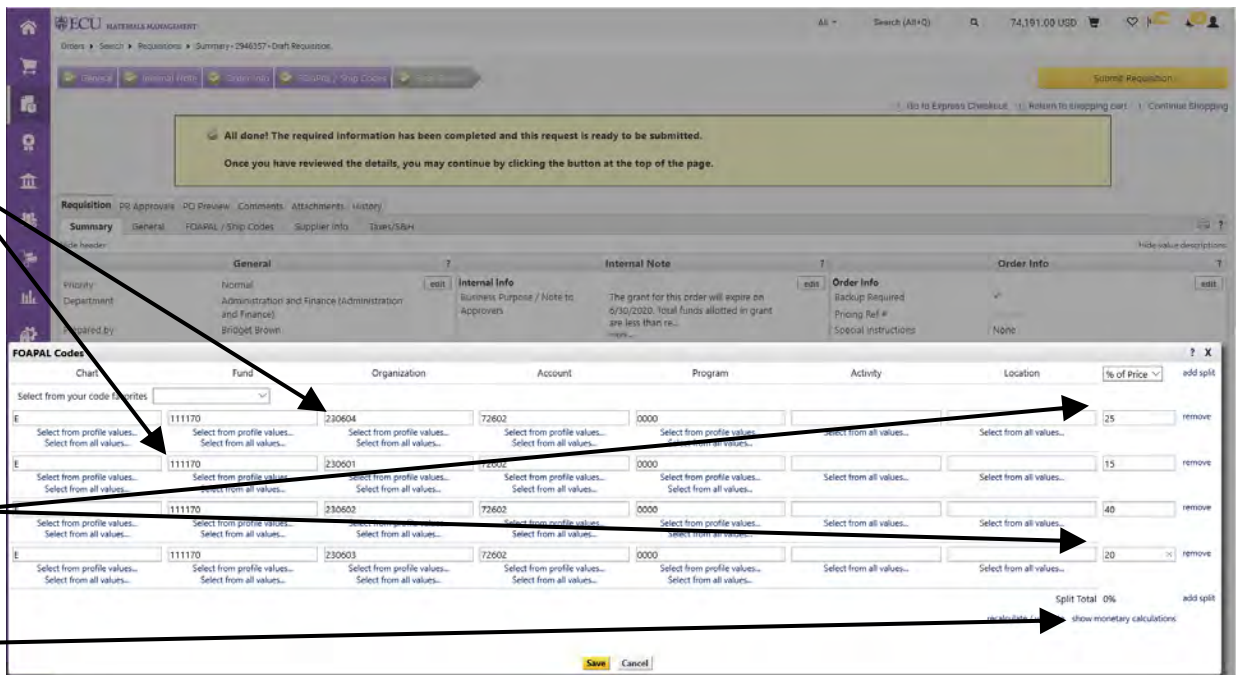
2. Click the **edit** button under the **FOAPAL/Ship Codes** section.

FOAPAL SPLIT – % OF PRICE AT HEADER

Last Updated on: 4/15/2020



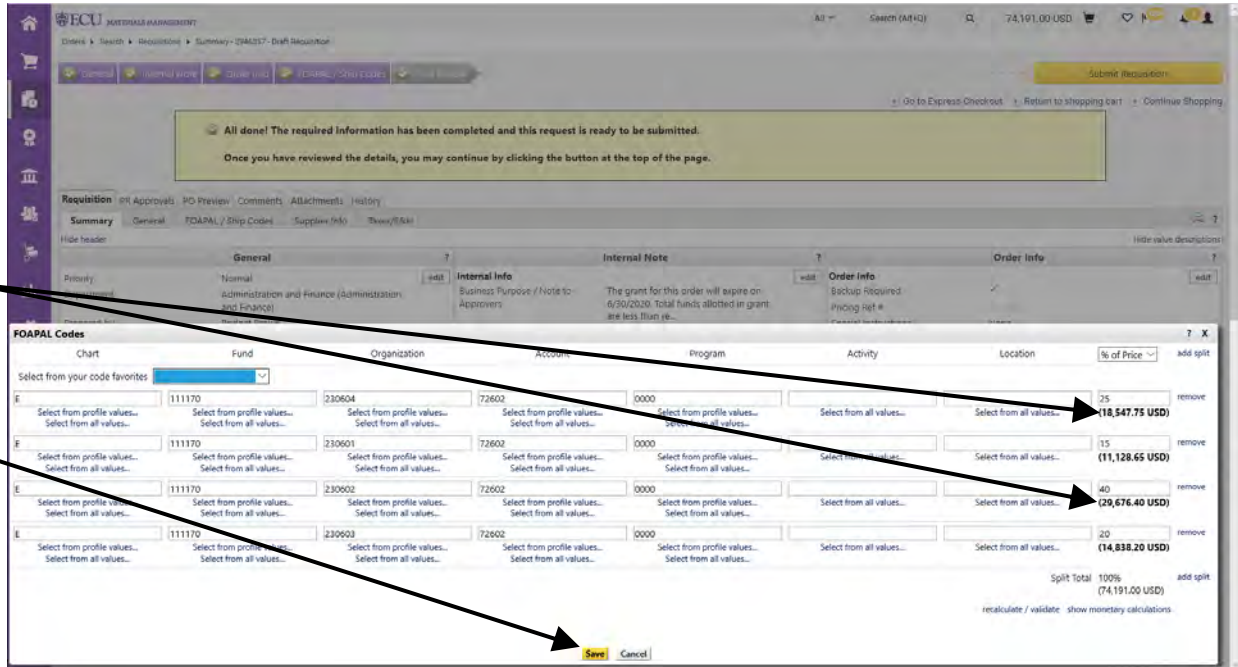
3. Click **add split** link for each FOAPAL string needed for the header split. In this example, we will have 4 splits.



4. Make the appropriate changes to each FOAPAL string for the % of Price Split.
5. Enter the % for each line FOAPAL split.
Note: Total % must equal 100%.
6. Click on **show monetary calculations** link to see dollar amounts for % splits.

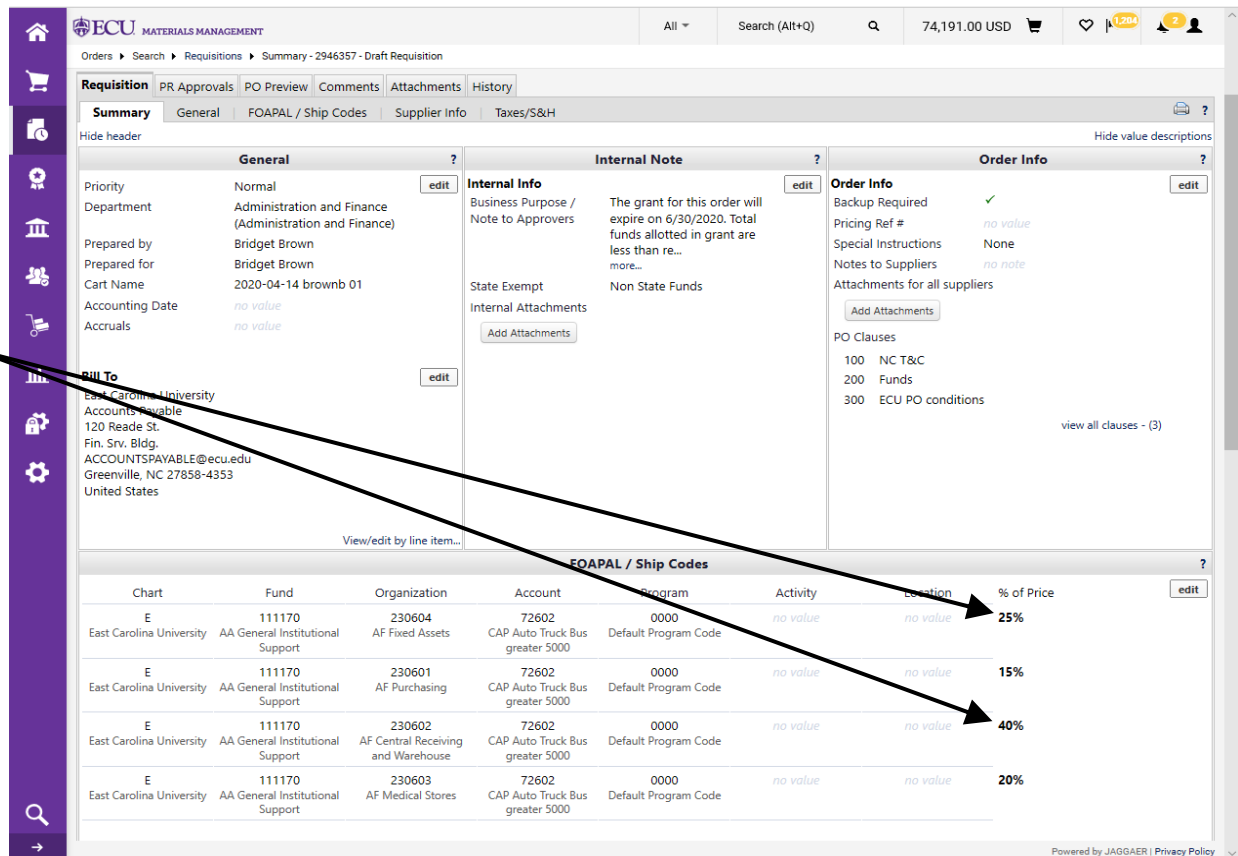
FOAPAL SPLIT – % OF PRICE AT HEADER

Last Updated on: 4/15/2020



7. Note the dollar amount values for the % of Price splits per FOAPAL string.

8. Click Save button to return to your Summary – Draft Cart.



9. This completes FOAPAL Split by % of Price at Header. See the Review Cart Items procedure to continue the review process.

EDIT SHIP TO – CART HEADER

Last Updated on: 4/14/2020

The screenshot shows the 'Summary' page of a requisition in the ECU Materials Management system. The page is divided into several sections: **General**, **Internal Note**, **Order Info**, and **FOAPAL / Ship Codes**. The **Ship To** section is highlighted with a box labeled '1.' and an arrow pointing to an 'edit' button. The **FOAPAL / Ship Codes** section shows a table with columns: Chart, Fund, Organization, Account, Program, Activity, and Location. The **Ship To** section includes contact information for Bridget Brown at East Carolina University.

1. Click on the **edit** button to change the **Ship To** code at the Header level (for every line item).

The screenshot shows the 'Edit current shipping address...' form in the ECU Materials Management system. The form contains fields for Contact Name, Phone, Email, and Address. Below the form is a section titled 'Or choose from your addresses...' with two address options. The first option is marked with a star icon and has a 'Use' button. The second option has a 'Use' button. A box labeled '2.' has arrows pointing to the 'Use' buttons.

2. The default ship code on your profile is identified with a star icon. For the 1st example, we will select another address from our profile value by clicking on the **Use** button.

EDIT SHIP TO – CART HEADER

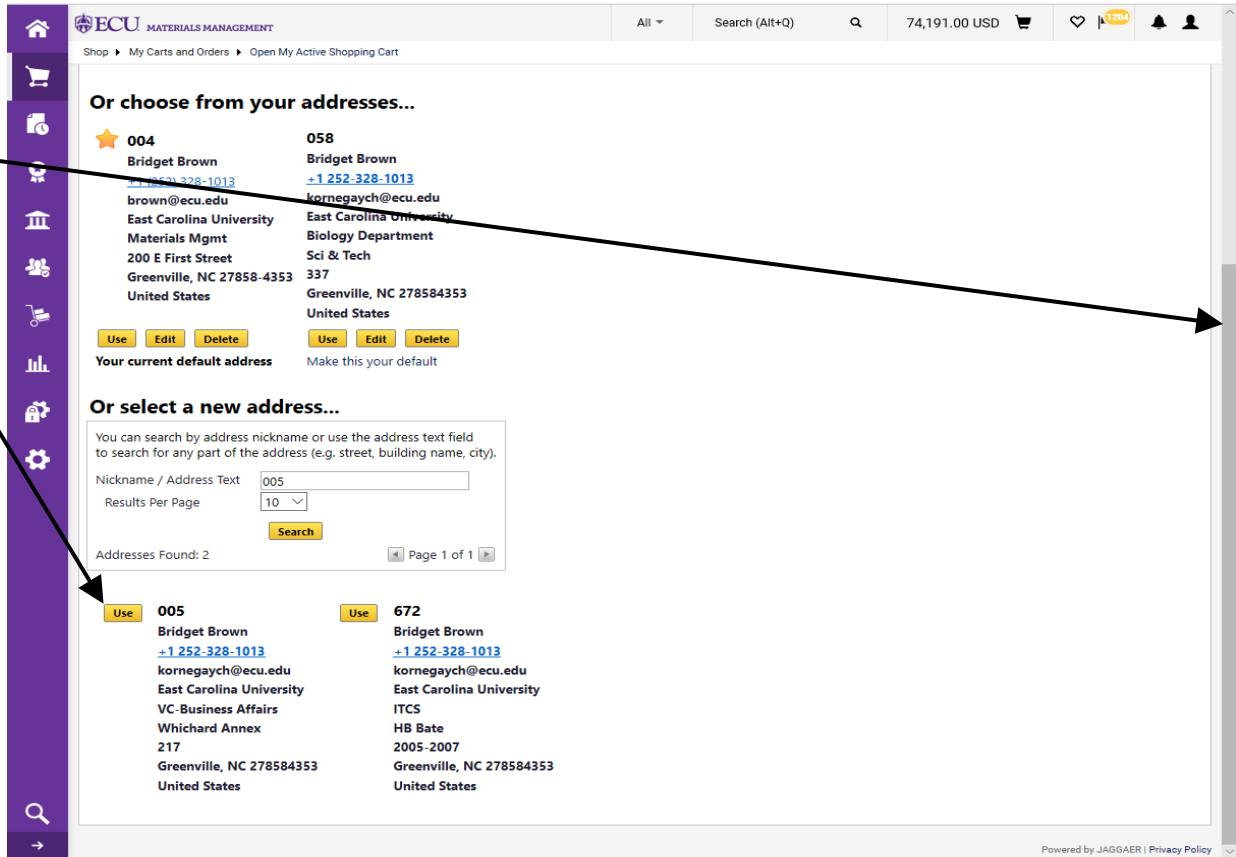
Last Updated on: 4/14/2020

3. Notice the shipping address has been updated. **Note:** The change that was just completed demonstrates how to search for a ship code on your profile. Now we are going to search for all ship codes to find one that does not exist on your profile.
4. Click on the **edit** button.

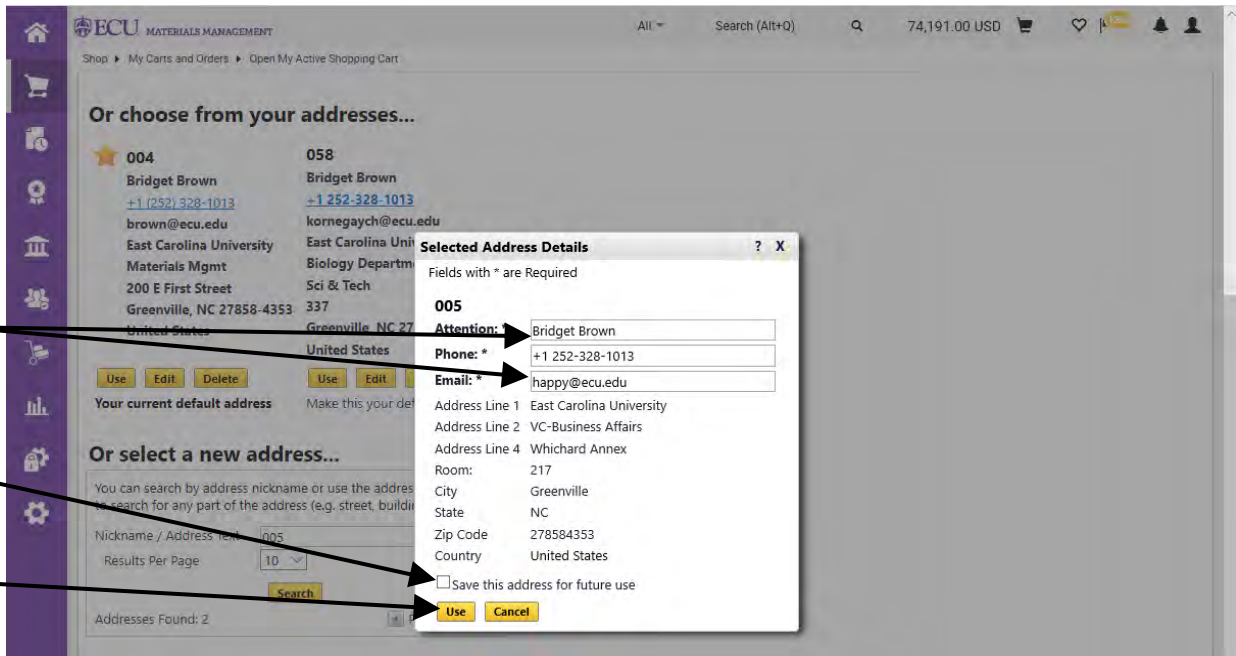
5. Scroll down to find the new address search field.
6. Enter the ship code value in the **Nickname / Address** text box for the 2nd example.
7. Click the **Search** button.

EDIT SHIP TO – CART HEADER

Last Updated on: 4/14/2020



8. Scroll down the page to see the result(s) for the criteria entered.
9. Click **Use** button for the desired ship code.



10. Change the contact information if appropriate.
11. If you want to add this address to your profile, check the **Save this address for future use** box.
12. Click the **Use** button.

EDIT SHIP TO – CART HEADER

Last Updated on: 4/14/2020

ECU MATERIALS MANAGEMENT

Orders > Search > Requisitions > Summary - 2946357 - Draft Requisition

Requisition PR Approvals PO Preview Comments Attachments History

Summary General FOAPAL / Ship Codes Supplier Info Taxes/S&H

Hide header

General	Internal Note	Order Info
Priority: Normal	Business Purpose / Note to Approvers: The grant for this order will expire on 6/30/2020. Total funds allotted in grant are less than re... more...	Backup Required: <input checked="" type="checkbox"/>
Department: Administration and Finance (Administration and Finance)	State Exempt: Non State Funds	Pricing Ref #: no value
Prepared by: Bridget Brown	Internal Attachments: Add Attachments	Special Instructions: None
Prepared for: Bridget Brown		Notes to Suppliers: no note
Cart Name: 2020-04-14 brownb 01		Attachments for all suppliers: Add Attachments
Accounting Date: no value		PO Clauses: 100 NC T&C, 200 Funds, 300 ECU PO conditions
Accruals: no value		view all clauses - (3)

Bill To: East Carolina University, Accounts Payable, 120 Reade St., Fin. Srv. Bldg., ACCOUNTSPAYABLE@ecu.edu, Greenville, NC 27858-4353, United States

View/edit by line item...

Chart	Fund	Organization	Account	Program	Activity	Location
E	111170	230604	72602	0000		no value
East Carolina University	AA General Institutional Support	AF Fixed Assets	CAP Auto Truck Bus greater 5000	Default Program Code		

Ship To: Attention: Bridget Brown, Phone: +1 252-328-1013, Email: happy@ecu.edu, East Carolina University, VC-Business Affairs, Whichard Annex, 217, Greenville, NC 278584353, United States

Powered by JAGGAER | Privacy Policy

13. The **Ship To** address has now been updated.

14. Click the **edit** button. **Note:** The final ship code edit will demonstrate steps for finding a ship code with Dept Name criteria.

Shop > My Carts and Orders > Open My Active Shopping Cart

Address Line 4 Whichard Annex

Room: 217
City: Greenville
State: NC
Zip Code: 278584353
Country: United States

Save this address for future use

Save Changes Cancel

Or choose from your addresses...

Address ID	Name	Phone	Email	Address
004	Bridget Brown	+1 252-328-1013	brown@ecu.edu	East Carolina University, Materials Mgmt, 200 E First Street, Greenville, NC 27858-4353, United States
058	Bridget Brown	+1 252-328-1013	kornegaych@ecu.edu	East Carolina University, Biology Department, Sci & Tech, 337, Greenville, NC 278584353, United States

Use Edit Delete (for current default address) Use Edit Delete (to make this your default)

Or select a new address...

You can search by address nickname or use the address text field to search for any part of the address (e.g. street, building name, city).

Nickname / Address Text: Brody

Results Per Page: 10

Search

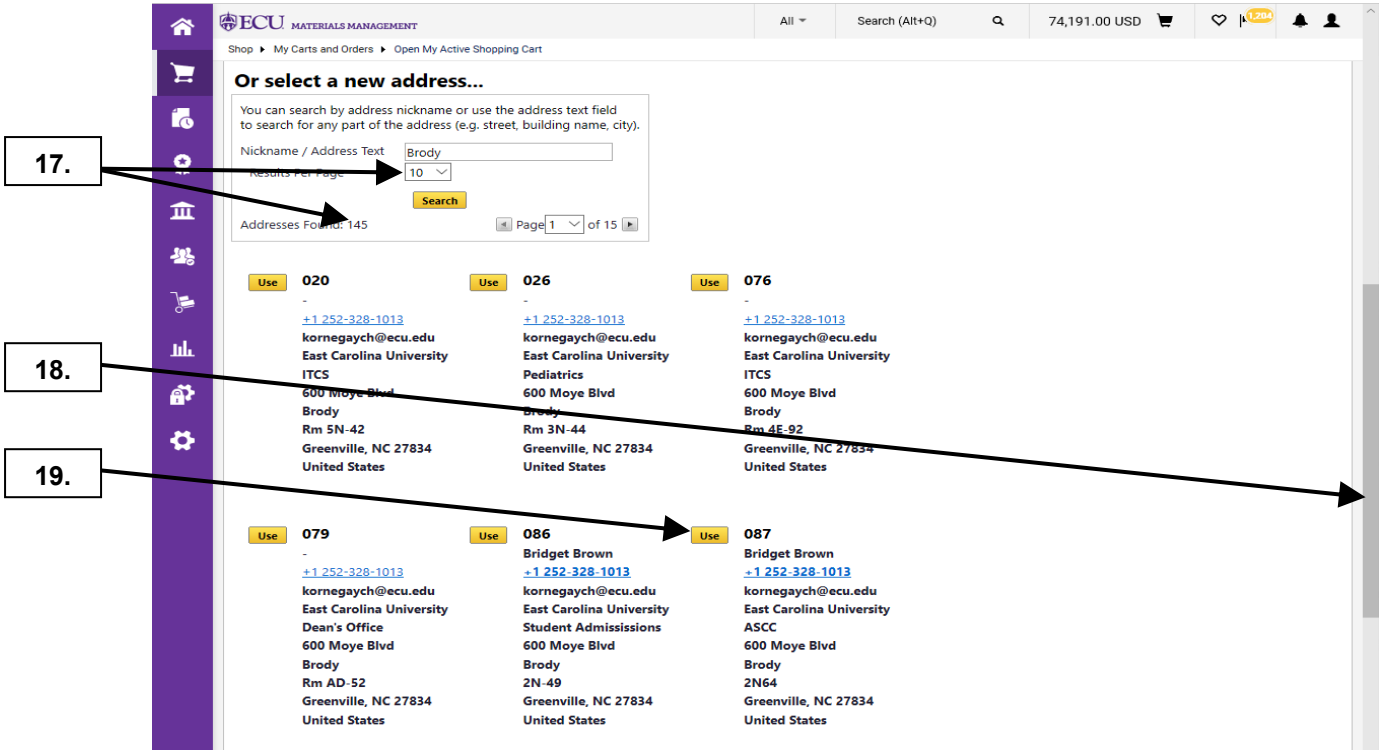
Powered by JAGGAER | Privacy Policy

15. Enter Bldg name for **Address Text** search criteria. **Note:** You can use any part of the delivery information (Dept Name, Bldg, Room, City, State, Zip Code) in the **Address Text** search criteria.

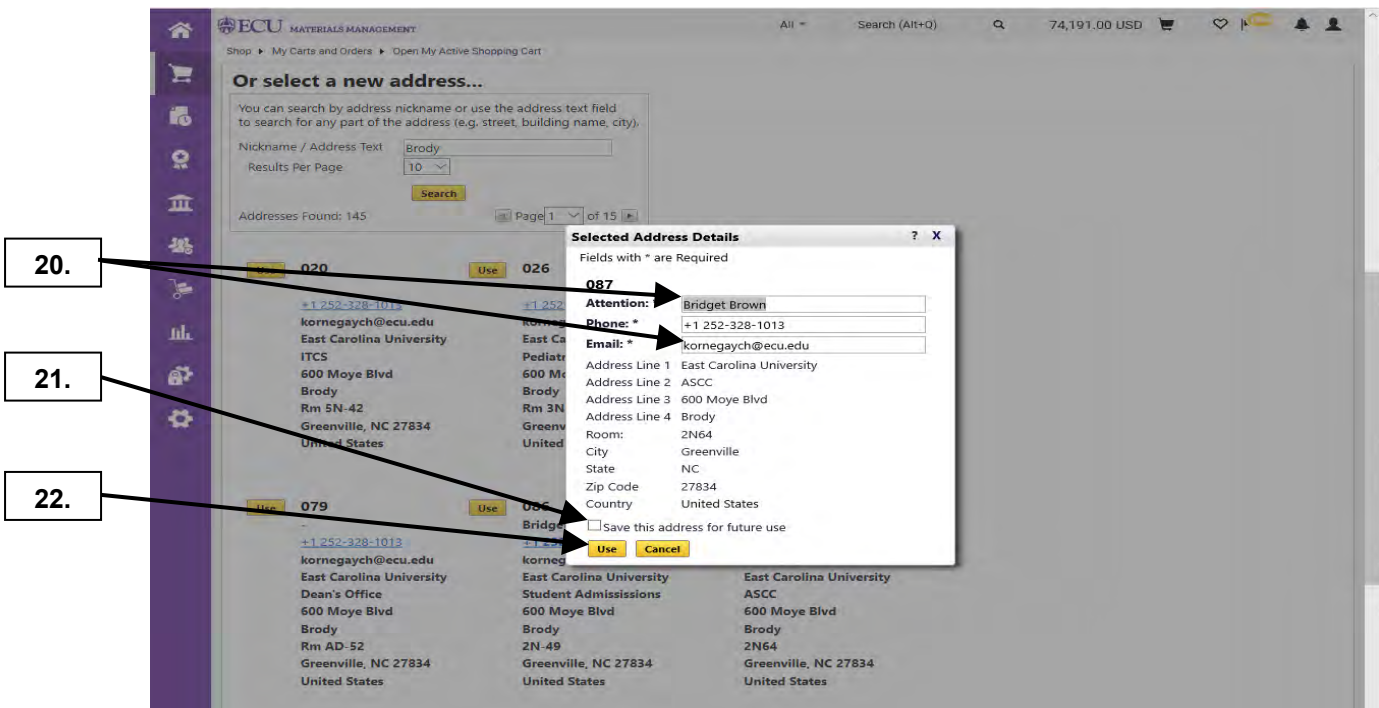
16. Click the **Search** button.

EDIT SHIP TO – CART HEADER

Last Updated on: 4/14/2020



- 17. Note the # of addresses that were found with the criteria “**Brody**”. You can change the **Results per page** to have more results on each page.
- 18. You can scroll down the page to find additional search results.
- 19. Click on **Use** button for the desired ship code.



- 20. Change your contact information if appropriate.
- 21. If you want to add this address to your profile, check the **Save this address for future use** box.
- 22. Click the **Use** button.

EDIT SHIP TO – CART HEADER

Last Updated on: 4/14/2020

The screenshot displays the 'EDIT SHIP TO – CART HEADER' interface in the ECU Materials Management system. The page is titled 'Orders > Search > Requisitions > Summary - 2946357 - Draft Requisition'. The main content area is divided into three columns: 'General', 'Internal Note', and 'Order Info'. The 'General' column contains fields for Priority (Normal), Department (Administration and Finance), Prepared by (Bridget Brown), Cart Name (2020-04-14 brownb 01), Accounting Date (no value), and Accruals (no value). The 'Internal Note' column contains a 'Business Purpose / Note to Approvers' section with a note about the grant expiration date (6/30/2020) and a 'State Exempt' section with 'Non State Funds'. The 'Order Info' column contains 'Backup Required' (checked), 'Pricing Ref #' (no value), 'Special Instructions' (None), 'Notes to Suppliers' (no note), and 'Attachments for all suppliers'. Below these columns is a 'FOAPAL / Ship Codes' table with columns for Chart, Fund, Organization, Account, Program, Activity, and Location. The table shows a single row for 'East Carolina University' with Fund 'AA General Institutional Support', Organization 'AF Fixed Assets', Account 'CAP Auto Truck Bus greater 5000', and Program 'Default Program Code'. At the bottom, the 'Ship To' section is highlighted with a callout box containing the number '23.'. The 'Ship To' address is: Attention: Bridget Brown, Phone: +1 252-328-1013, Email: kornegaych@ecu.edu, East Carolina University, ASCC, 600 Moye Blvd, Brody, 2N64, Greenville, NC 27834, United States.

23.

23. The **Ship To** address has now been updated.

24. This completes the procedures for reviewing and editing **Ship To** addresses for all line items. See the **Review Cart Items** procedure to continue the review process.

FOAPAL EDIT BY LINE ITEM

Last Updated on: 4/15/2020

ECU MATERIALS MANAGEMENT

Orders > Search > Requisitions > Summary - 2946357 - Draft Requisition

General Internal Note Order Info **FOAPAL / Ship Codes** Final Review

Submit Requisition

Go to Express Checkout Return to shopping cart Continue Shopping

All done! The required information has been completed and this request is ready to be submitted.
Once you have reviewed the details, you may continue by clicking the button at the top of the page.

Requisition PR Approvals PO Preview Comments Attachments (3) History

Summary General **FOAPAL / Ship Codes** Supplier Info Taxes/S&H

Hide header Hide value descriptions

General	Internal Note	Order Info
Priority: Normal	Internal info: Business Purpose / Note to Approvers: The grant for this order will expire on 6/30/2020. Total funds allotted in grant are less than re... more...	Order Info: Backup Required: <input checked="" type="checkbox"/> Pricing Ref #: no value Special Instructions: None Notes to Suppliers: no note
Department: Administration and Finance (Administration and Finance)	State Exempt: Non State Funds	Attachments for all suppliers: Add Attachments
Prepared by: Bridget Brown	Internal Attachments: Mustang Quote.pdf, Vehicle_Options.pdf, Warranty_Informat...	PO Clauses: 100 NC T&C, 200 Funds, 300 ECU PO conditions
Prepared for: Bridget Brown		view all clauses - (3)
Cart Name: 2020-04-14 brownb 01		
Accounting Date: no value		
Accruals: no value		

Bill To: East Carolina University, Accounts Payable, 120 Reade St, Fin. Srv. Bldg, ACCOUNTSPAYABLE@ecu.edu, Greenville, NC 27858-4353, United States

View/edit by line item...

Chart	Fund	Organization	Account	Program	Activity	Location
E	111170	230604	72602	0000	no value	no value
East Carolina University	AA General Institutional Support	AF Fixed Assets	CAP Auto Truck Bus greater 5000	Default Program Code		

1. To make FOAPAL line item changes, click on the **FOAPAL / Ship Codes** tab.

ECU MATERIALS MANAGEMENT

Orders > Search > Requisitions > FOAPAL / Ship Codes - 2946357 - Draft Requisition

General Internal Note Order Info **FOAPAL / Ship Codes** Final Review

Submit Requisition

Go to Express Checkout Return to shopping cart Continue Shopping

You have completed the required information in this step. At this point, you can do the following:
Proceed to the next step: Final Review.

Requisition PR Approvals PO Preview Comments Attachments (3) History

Summary General **FOAPAL / Ship Codes** Supplier Info Taxes/S&H

Hide value descriptions

Chart	Fund	Organization	Account	Program	Activity	Location
E	111170	230604	72602	0000	no value	no value
East Carolina University	AA General Institutional Support	AF Fixed Assets	CAP Auto Truck Bus greater 5000	Default Program Code		

Ship To: Shipping address, Attention: Bridget Brown, Phone: +1 252-328-1013, Email: kornegaych@ecu.edu, East Carolina University, ASCC, 600 Moye Blvd, Brody, 2N64, Greenville, NC 27834, United States

2. Notice the FOAPAL values and shipping address that are currently displayed for every line item.
3. Scroll down the page to make a FOAPAL change to a line item.

FOAPAL EDIT BY LINE ITEM

Last Updated on: 4/15/2020

Capital Ford Inc [more info...](#)
Fulfillment Center 1
4900 Capital Blvd, Raleigh, NC 27658 US

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1 2020 Shelby Mustang GT500 Metallic Blue with White Racing Stripes more info...	GT500	EA	73,995.00	1 EA	73,995.00 USD	<input type="checkbox"/>
FOAPAL Codes (same as header)						<input type="button" value="edit"/>
Ship To (same as header)						<input type="button" value="edit"/>
2 Black Rugged Floor Mats more info...	MATS	EA	49.00	4 EA	196.00 USD	<input type="checkbox"/>
FOAPAL Codes (same as header)						<input type="button" value="edit"/>
Ship To (same as header)						<input type="button" value="edit"/>
Supplier subtotal					74,191.00	
Shipping					0.00	
Handling					0.00	
Supplier total					74,191.00 USD	
Subtotal					74,191.00	
Shipping					0.00	
Handling					0.00	
Total					74,191.00 USD	

4. Click the **edit** button to change the FOAPAL for the line item.

Ship To
Shipping address
Attention: Bridget Brown
Phone: +1 352 378 1011
Email: kornegaych@ecu.edu
East Carolina University
ASCC
600 Moyle Blvd
Brody
27664
Greenville, NC 27834
United States

For selected line items: [Add to Favorites](#)

Capital Ford Inc [more info...](#)
Fulfillment Center 1
4900 Capital Blvd, Raleigh, NC 27658 US

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1 2020 Shelby Mustang GT500 Metallic Blue with White Racing Stripes more info...	GT500	EA	73,995.00	1 EA	73,995.00 USD	<input type="checkbox"/>
FOAPAL Codes (same as header)						

FOAPAL Codes

Chart	Full	Organization	Account	Program	Activity	Location
Select from your code favorites						
E	1111170	230603	72602	0000		
Select from profile values... Select from all values...	Select from profile values... Select from all values...	Select from profile values... Select from all values...	Select from profile values... Select from all values...	Select from profile values... Select from all values...	Select from all values...	Select from all values...
<input type="button" value="Save"/> <input type="button" value="Cancel"/>						<input type="button" value="edit"/>

5. For a quick change, input the value for the FOAPAL element needing change. For instructions on selecting values from your profile or all values, see the FOAPAL Edit at Header procedure (steps 6-17).
6. Click the **Save** button.

FOAPAL EDIT BY LINE ITEM

Last Updated on: 4/15/2020

The screenshot displays the ECU Materials Management interface. At the top, it shows the user's name 'All', a search bar, and a total amount of '74,191.00 USD'. The main content area is titled 'Orders > Search > Requisitions > FOAPAL / Ship Codes - 284337 - Draft Requisition'. Below this, there is a 'Ship To' section with a shipping address and contact information for Bridget Brown at East Carolina University. A table of line items is shown, with the first item being '2020 Shelby Mustang GT500 Metallic Blue with White Racing Stripes'. Below the table, there is a 'FOAPAL Codes' section with a table of codes. Two callout boxes are present: box '7.' points to the 'FOAPAL Codes' section, and box '8.' points to the 'Ship To' section.

Line Item	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1	2020 Shelby Mustang GT500 Metallic Blue with White Racing Stripes	GT500	EA	73,995.00	1 EA	73,995.00 USD
2	Black Rugged Floor Mats	MATS	EA	49.00	4 EA	196.00 USD

Chart	Fund	Organization	Account	Program	Activity	Location
E	111170	230603	72602	0000		
East Carolina University	AA General Instructional Support	AF Medical Stores	CAP Auto Truck Bus greater 5000	Default Program Code		

7. Click the split type dropdown to select **Amount of Price**.

Note: Line items may be split by percentage or price.

8. This process can be completed for each line item. See the **FOAPAL Split by Amount at Line Item** procedure for further options on editing FOAPAL values and amounts at the line item level.

FOAPAL SPLIT BY AMOUNT AT LINE ITEM

Last Updated on: 4/15/2020

ECU MATERIALS MANAGEMENT | All | Search (Alt+Q) | 74,191.00 USD | 1295 | 3

Orders > Search > Requisitions > Summary - 2946357 - Draft Requisition

General Internal Note Order Info FOAPAL / Ship Codes Final Review Submit Requisition

Go to Express Checkout Return to shopping cart Continue Shopping

All done! The required information has been completed and this request is ready to be submitted.
Once you have reviewed the details, you may continue by clicking the button at the top of the page.

Requisition Summary General FOAPAL / Ship Codes Supplier Info Taxes/S&H

Hide header Hide value descriptions

General	Internal Note	Order Info
Priority Normal edit	Internal info edit	Order Info edit
Department Administration and Finance (Administration and Finance)	Business Purpose / Note to Approvers The grant for this order will expire on 6/30/2020. Total funds allotted in grant are less than re... more...	Backup Required <input checked="" type="checkbox"/>
Prepared by Bridget Brown	State Exempt Non State Funds	Pricing Ref # no value
Prepared for Bridget Brown	Internal Attachments	Special Instructions None
Cart Name 2020-04-14 brownb 01	Add Attachments	Notes to Suppliers no note
Accounting Date no value	Mustang Quote.pdf Remove	Attachments for all suppliers
Accruals no value	Vehicle_Options.pdf Remove	Add Attachments
Bill To edit	Warranty_Informat... Remove	PO Clauses
East Carolina University		100 NC T&C
Accounts Payable		200 Funds
120 Reade St.		300 ECU PO conditions
Fin. Srv. Bldg.		view all clauses - (3)
ACCOUNTSPAYABLE@ecu.edu		
Greenville, NC 27858-4353		
United States		

View/edit by line item...

Chart	Fund	Organization	Account	Program	Activity	Location
E	111170	230604	72602	0000	no value	no value
East Carolina University	AA General Institutional Support	AF Fixed Assets	CAP Auto Truck Bus greater 5000	Default Program Code		

1. To make FOAPAL line item changes, click on the **FOAPAL / Ship Codes** tab.

Note: Splitting the FOAPAL codes for payment by exact dollar amount can only be done at the line item level.

ECU MATERIALS MANAGEMENT | All | Search (Alt+Q) | 74,191.00 USD | 1295 | 3

Orders > Search > Requisitions > FOAPAL / Ship Codes - 2946357 - Draft Requisition

General Internal Note Order Info FOAPAL / Ship Codes Final Review Submit Requisition

Go to Express Checkout Return to shopping cart Continue Shopping

You have completed the required information in this step. At this point, you can do the following:
Proceed to the next step: Final Review.

Requisition Summary General FOAPAL / Ship Codes Supplier Info Taxes/S&H

Hide value descriptions

Chart	Fund	Organization	Account	Program	Activity	Location
E	111170	230604	72602	0000	no value	no value
East Carolina University	AA General Institutional Support	AF Fixed Assets	CAP Auto Truck Bus greater 5000	Default Program Code		

Ship To [edit](#)

Shipping address

Attention: Bridget Brown
Phone: +1 252-328-1013
Email: kornegaych@ecu.edu
East Carolina University
ASCC
600 Moye Blvd
Brody
2N64
Greenville, NC 27834
United States

FOAPAL SPLIT BY AMOUNT AT LINE ITEM

Last Updated on: 4/15/2020

2. Notice the FOAPAL values and shipping address that are currently displayed for every line item.
3. Scroll down the page to make a FOAPAL change to a line item.

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 2020 Shelby Mustang GT500 Metallic Blue with White Racing Stripes	GT500	EA	73,995.00	1 EA	73,995.00 USD
2 Black Rugged Floor Mats	MATS	EA	49.00	4 EA	196.00 USD

Supplier subtotal	74,191.00
Shipping	0.00
Handling	0.00
Supplier total	74,191.00 USD
Subtotal	74,191.00
Shipping	0.00
Handling	0.00
Total	74,191.00 USD

4.

4. Click the **edit** button to change the FOAPAL for the line item.

FOAPAL Codes

Chart	Fund	Organization	Account	Program	Activity	Location
Select from your code favorites						
E	1111170	230604	72602	0000		

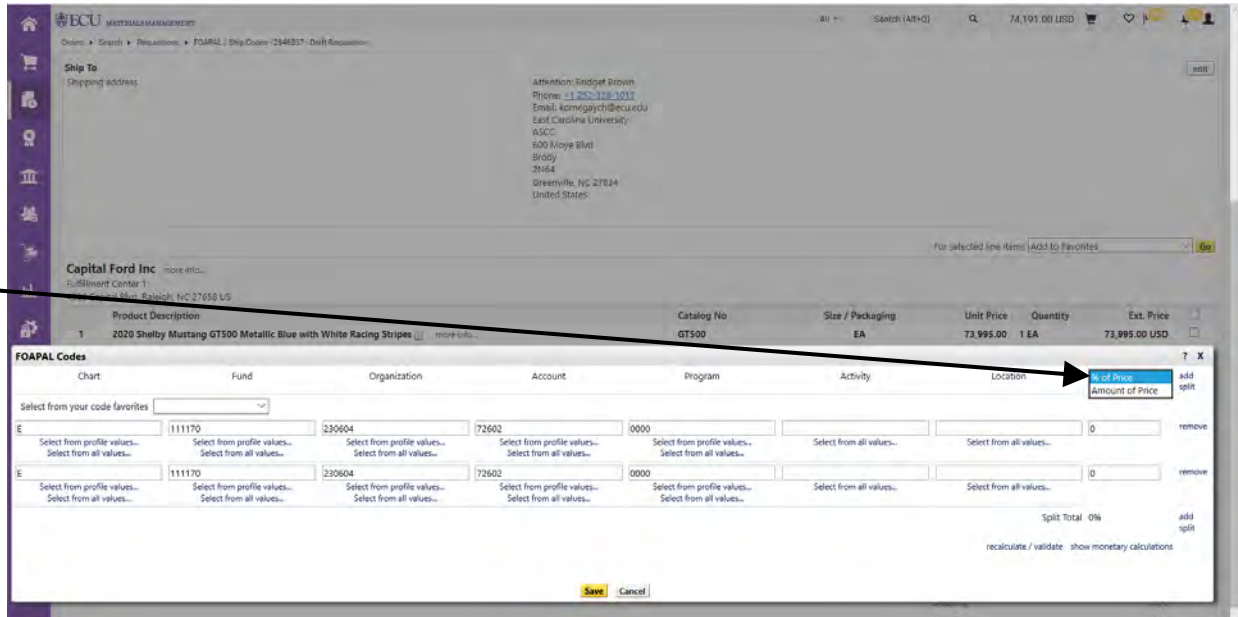
add split

5.

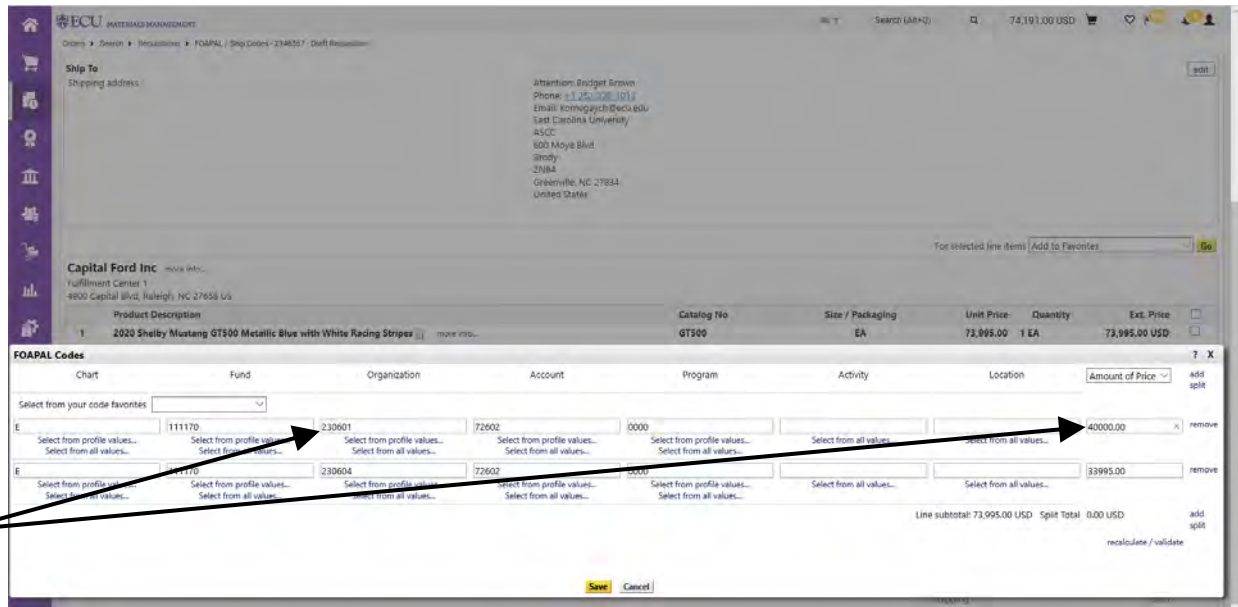
5. To add one or more FOAPAL splits to a line item, click the **add split** link.

FOAPAL SPLIT BY AMOUNT AT LINE ITEM

Last Updated on: 4/15/2020



6. Click the split type dropdown to select **Amount of Price**.
Note: Line items may be split by percentage or price.



7. Make the change to your FOAPAL value and input the corresponding dollar value.

FOAPAL SPLIT BY AMOUNT AT LINE ITEM

Last Updated on: 4/15/2020

ECU MATERIALS MANAGEMENT

Orders > Search > Requisitions > FOAPAL / Ship Codes - 2346357 - Draft Requisition

Ship To (Shipping address): Attention: Bridget Brown, Phone: 1-252-328-1017, Email: komegach@ecu.edu, East Carolina University, ASCC, 4900 Mayo Blvd, #3074, 25764, Greenville, NC 27931, United States

Capital Ford Inc. more info...
Fulfillment Center 1
4900 Capital Blvd, Raleigh, NC 27658 US

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
2020 Shelby Mustang GT500 Metallic Blue with White Racing Stripes	GT500	EA	73,995.00	1 EA	73,995.00 USD

FOAPAL Codes

Chart	Fund	Organization	Account	Program	Activity	Location	Amount of Price	add split
E	111170	230601	72602	0000			40,000.00	remove
E	111170	230604	72602	0000			33,995.00	remove

Line subtotal: 73,995.00 USD Split Total: 73,995.00 USD add split
recalculate / validate

Save Cancel

8. Use the recalculate / validate tool link to ensure your line subtotal matches the split total. Click **Save**.

ECU MATERIALS MANAGEMENT

Orders > Search > Requisitions > FOAPAL / Ship Codes - 2346357 - Draft Requisition

Capital Ford Inc. more info...
Fulfillment Center 1
4900 Capital Blvd, Raleigh, NC 27658 US

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
2020 Shelby Mustang GT500 Metallic Blue with White Racing Stripes	GT500	EA	73,995.00	1 EA	73,995.00 USD

FOAPAL Codes

FOAPAL values have been overridden for this line

Chart	Fund	Organization	Account	Program	Activity	Location	Amount of Price	edit
E	111170	230601	72602	0000			40,000.00 USD	
E	111170	230604	72602	0000			33,995.00 USD	

Copy to other lines

Ship To (same as requisition) edit

2	Black Rugged Floor Mats	MATS	EA	49.00	4 EA	196.00 USD
---	-------------------------	------	----	-------	------	------------

FOAPAL Codes (same as header) edit

Ship To (same as header) edit

Supplier subtotal	74,191.00
Shipping	0.00
Handling	0.00
Supplier total	74,191.00 USD
Subtotal	74,191.00
Shipping	0.00
Handling	0.00
Total	74,191.00 USD

9. Notice the information bulletin indicating **values have been overridden for this line** is displayed as a result of the FOAPAL being changed from the FOAPAL Code on the header.
Note: Repeat this process for any/every line item requiring multiple FOAPAL codes.

SHIP TO EDIT BY LINE ITEM

Last Updated on: 4/15/2020

ECU MATERIALS MANAGEMENT | All | Search (Alt+Q) | 74,191.00 USD | 1,225 | 3

Orders > Search > Requisitions > Summary - 2946357 - Draft Requisition

General Internal Note Order Info FOAPAL / Ship Codes Final Review Submit Requisition

Go to Express Checkout Return to shopping cart Continue Shopping

All done! The required information has been completed and this request is ready to be submitted.
Once you have reviewed the details, you may continue by clicking the button at the top of the page.

Requisition Summary General FOAPAL / Ship Codes Supplier Info Taxes/S&H

Hide header Hide value descriptions

General	Internal Note	Order Info												
Priority Normal <input type="button" value="edit"/>	Business Purpose / Note to Approvers The grant for this order will expire on 6/30/2020. Total funds allotted in grant are less than re... more...	Backup Required <input checked="" type="checkbox"/>												
Department Administration and Finance (Administration and Finance)	State Exempt Non State Funds	Pricing Ref # no value												
Prepared by Bridget Brown	Internal Attachments	Special Instructions None												
Prepared for Bridget Brown	<input type="button" value="Add Attachments"/>	Notes to Suppliers no note												
Cart Name 2020-04-14 brownb 01	<table border="1"><thead><tr><th>Date</th><th></th><th></th></tr></thead><tbody><tr><td>4/15/2020</td><td>Remove</td><td></td></tr><tr><td>4/15/2020</td><td>Remove</td><td></td></tr><tr><td>4/15/2020</td><td>Remove</td><td></td></tr></tbody></table>	Date			4/15/2020	Remove		4/15/2020	Remove		4/15/2020	Remove		Attachments for all suppliers
Date														
4/15/2020	Remove													
4/15/2020	Remove													
4/15/2020	Remove													
Accounting Date no value		<input type="button" value="Add Attachments"/>												
Accruals no value		Date												
Bill To East Carolina University Accounts Payable 120 Reade St. Fin. Srv. Bldg. ACCOUNTSPAYABLE@ecu.edu Greenville, NC 27858-4353 United States <input type="button" value="edit"/>		PO Clauses												
		100 NC T&C												
		200 Funds												
		300 ECU PO conditions												
		view all clauses - (3)												

View/edit by line item... FOAPAL / Ship Codes

1. Click on the **FOAPAL / Ship Codes** to view details on the current shipping address.

ECU MATERIALS MANAGEMENT | All | Search (Alt+Q) | 74,191.00 USD | 1,225 | 3

Orders > Search > Requisitions > FOAPAL / Ship Codes - 2946357 - Draft Requisition

General Internal Note Order Info FOAPAL / Ship Codes Final Review Submit Requisition

Go to Express Checkout Return to shopping cart Continue Shopping

You have completed the required information in this step. At this point, you can do the following:
Proceed to the next step: Final Review.

Requisition Summary General FOAPAL / Ship Codes Supplier Info Taxes/S&H

Hide header Hide value descriptions

FOAPAL / Ship Codes

These values apply to all lines unless specified by line item

Chart	Fund	Organization	Account	Program	Activity	Location
E	111170	230604	72602	0000	no value	no value
East Carolina University	AA General Institutional Support	AF Fixed Assets	CAP Auto Truck Bus greater 5000	Default Program Code		

Copy to other lines
 FOAPAL Codes Values vary by line.

Ship To Shipping address

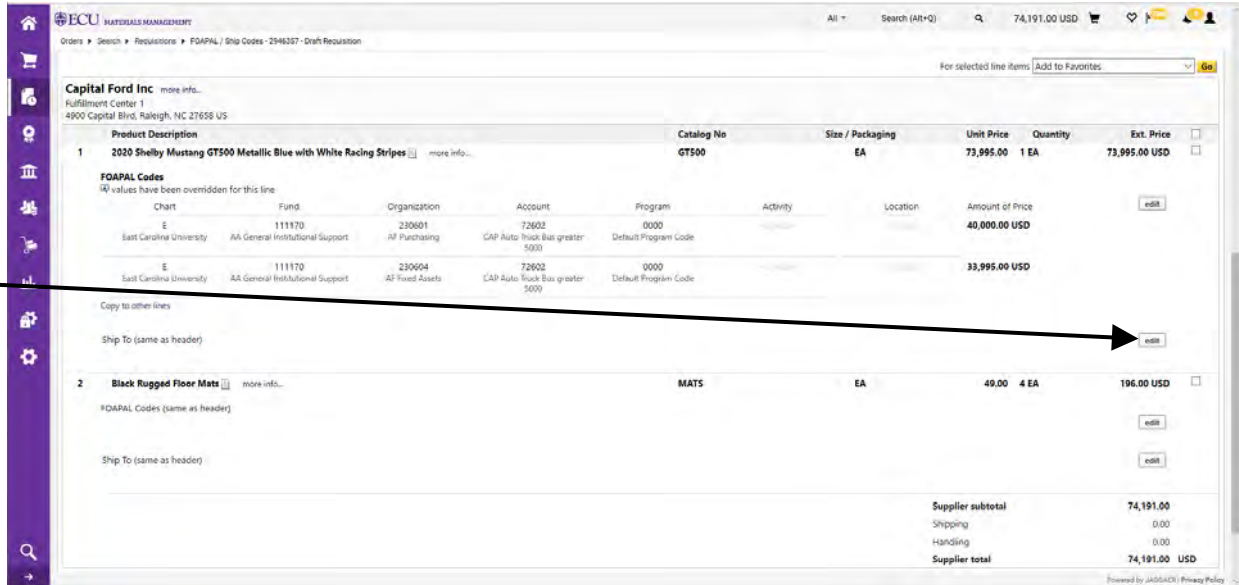
Attention: Bridget Brown
Phone: [+1 252-328-1013](tel:+1252-328-1013)
Email: kornegaych@ecu.edu
East Carolina University
ASCC
600 Moye Blvd
Brody
2N64
Greenville, NC 27834
United States

2. The Ship To address displayed at the header will

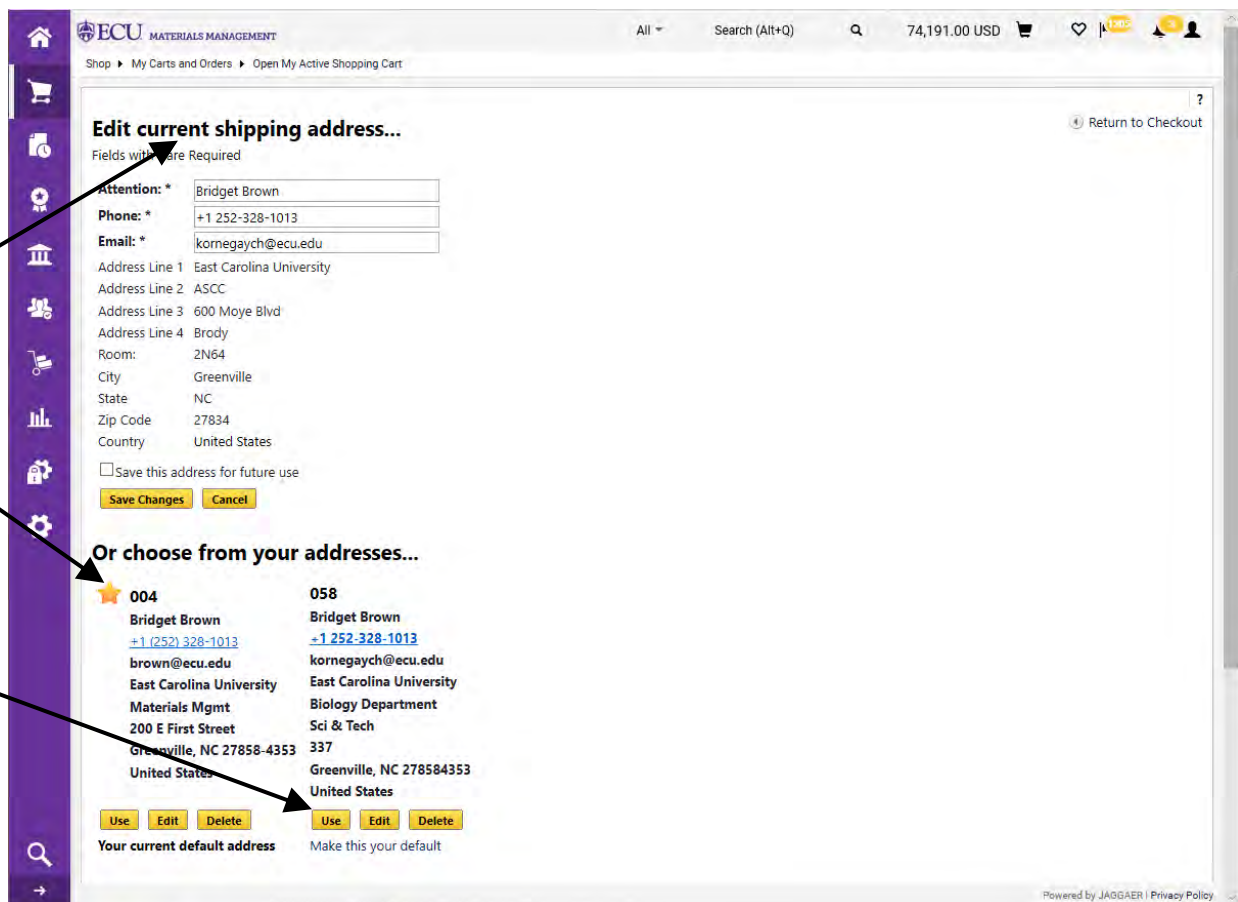
3. Scroll down to the line items to change the ship to address for each appropriate line.

SHIP TO EDIT BY LINE ITEM

Last Updated on: 4/15/2020



4. Click the **edit** button corresponding with the Ship To value requiring a change.



5. You can make simple edits to the current shipping address. For instructions on searching for ship to addresses, see the **Edit Ship To – Cart Header** procedure (steps 5 – 12).
6. The default Ship To code on your profile is indicated by a star icon.
7. Click the **Use** button for the desired ship code on your profile.

SHIP TO EDIT BY LINE ITEM

Last Updated on: 4/15/2020

Capital Ford Inc more info...
Fulfillment Center 1
4900 Capital Blvd, Raleigh, NC 27658 US

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price					
1 2020 Shelby Mustang GT500 Metallic Blue with White Racing Stripes	GT500	EA	73,995.00	1 EA	73,995.00 USD					
FOAPAL Codes values have been overridden for this line										
Chart	Fund	Organization	Account	Program	Activity	Location	Amount of Price	edit		
E East Carolina University	111170 AA General Institutional Support	230601 AF Purchasing	72602 CAP Auto Truck Bus greater 5000	0000 Default Program Code	no value	no value	40,000.00 USD			
E East Carolina University	111170 AA General Institutional Support	230604 AF Fixed Assets	72602 CAP Auto Truck Bus greater 5000	0000 Default Program Code	no value	no value	33,995.00 USD			
Ship To values have been overridden for this line Shipping address						Attention: Bridget Brown Phone: +1 252-328-1013 Email: kornegaych@ecu.edu East Carolina University Biology Department Sci & Tech 337 Greenville, NC 278584353 United States				
Copy to other lines						edit				
Copy to other lines										
2 Black Rugged Floor Mats						MATS	EA	49.00	4 EA	196.00 USD
FOAPAL Codes (same as header)						edit				
Ship To (same as header)						edit				
Supplier subtotal						74,191.00				

8. The Ship To address has been updated for line item 1 indicated by the message: **values have been overridden for this line.**
9. Other line items retain the Ship To record from the header.
10. Scroll back to the top of the document to find the **PO Preview** tab.

ECU MATERIALS MANAGEMENT

Orders > Search > Requisitions > FOAPAL / Ship Codes - 2946357 - Draft Requisition

General Internal Note Order Info FOAPAL / Ship Codes Final Review Submit Requisition

Go to Express Checkout Return to shopping cart Continue Shopping

You have completed the required information in this step. At this point, you can do the following:
Proceed to the next step: Final Review.

Requisition PR Approval PO Preview Comments Attachments (3) History

Summary General **FOAPAL / Ship Codes** Supplier Info Taxes/S&H

FOAPAL / Ship Codes
These values apply to all lines unless specified by line item

Chart	Fund	Organization	Account	Program	Activity	Location	edit
E East Carolina University	111170 AA General Institutional Support	230604 AF Fixed Assets	72602 CAP Auto Truck Bus greater 5000	0000 Default Program Code	no value	no value	
Copy to other lines						FOAPAL Codes Values vary by line.	
Ship To Values vary by line. Shipping address						Attention: Bridget Brown Phone: +1 252-328-1013 Email: kornegaych@ecu.edu East Carolina University ASCC 600 Moye Blvd Brody 2N64 Greenville, NC 27834 United States	
Copy to other lines						Ship To Values vary by line.	

11. Click on the **PO Preview** tab.

SHIP TO EDIT BY LINE ITEM

Last Updated on: 4/15/2020

ECU MATERIALS MANAGEMENT

Orders Search Requisitions PO Preview - 2946357 - Draft Requisition

All done! The required information has been completed and this request is ready to be submitted.
Once you have reviewed the details, you may continue by clicking the button at the top of the page.

Requisition PR Approvals **PO Preview** Comments Attachments (3) History

Preview PO 1

Capital Ford Inc [more info...](#) PO Number To Be Assigned

Fulfillment Center 1
4900 Capital Blvd, Raleigh, NC 27658 US

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 2020 Shelby Mustang GT500 Metallic Blue with White Racing Stripes	GT500	EA	73,995.00	1 EA	73,995.00 USD
PO subtotal					73,995.00
Shipping					0.00
Handling					0.00
PO total					73,995.00 USD

Reason(s) for multiple POs for this supplier:
Shipping address differs

Preview PO 2

Capital Ford Inc [more info...](#) PO Number To Be Assigned

Fulfillment Center 1
4900 Capital Blvd, Raleigh, NC 27658 US

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
2 Black Rugged Floor Mats	MATS	EA	49.00	4 EA	196.00 USD
PO subtotal					196.00
Shipping					0.00
Handling					0.00
PO total					196.00 USD

Reason(s) for multiple POs for this supplier:
Shipping address differs

12.

13.

14.

12. Notice that the **PO Preview** indicates the requisition will create two different purchase orders.
Note: The splitting of POs is a result of having different ship codes for each line item. If the same ship code was on every line item, only one purchase order would be generated.
13. Notice the message: **Reason(s) for multiple POs for this supplier.**
14. Scroll back to the top of the document.

SHIP TO EDIT BY LINE ITEM

Last Updated on: 4/15/2020

Orders > Search > Requisitions > Summary - 2946357 - Draft Requisition

General Internal Note Order Info FOAPAL / Ship Codes Final Review Submit Requisition

Go to Express Checkout Return to Shopping cart Continue Shopping

All done! The required information has been completed and this request is ready to be submitted.
Once you have reviewed the details, you may continue by clicking the button at the top of the page.

Requisition Summary PR Approvals PO Preview Comments Attachments (3) History

Summary General FOAPAL / Ship Codes Supplier Info Taxes/SS&H

Hide header Hide value descriptions

General	Internal Note	Order Info
Priority Normal <input type="button" value="edit"/>	Internal Info <input type="button" value="edit"/>	Order Info <input type="button" value="edit"/>
Department Administration and Finance (Administration and Finance)	Business Purpose / Note to Approvers The grant for this order will expire on 6/30/2020. Total funds allotted in grant are less than re... more...	Backup Required <input checked="" type="checkbox"/>
Prepared by Bridget Brown	State Exempt Non State Funds	Pricing Ref # no value
Prepared for Bridget Brown	Internal Attachments	Special Instructions None
Cart Name 2020-04-14 Brownb 01	<input type="button" value="Add Attachments"/>	Notes to Suppliers no note
Accounting Date no value	<input type="button" value="Mustang Quote.pdf"/> Remove	Attachments for all suppliers
Accruals no value	<input type="button" value="Vehicle_Options.pdf"/> Remove	<input type="button" value="Add Attachments"/>
Bill To <input type="button" value="edit"/>	<input type="button" value="Warranty_Informat..."/> Remove	PO Clauses
East Carolina University		100 NC T&C
Accounts Payable		200 Funds
120 Reade St.		300 ECU PO conditions
Fin. Srv. Bldg.		
ACCOUNTSPAYABLE@ecu.edu		
Greenville, NC 27858-4353		
United States		

View/edit by line item...

Chart	Fund	Organization	Account	Program	Activity	Location
E	111170	230604	72602	0000	no value	no value
East Carolina University	AA General Institutional Support	AF Fixed Assets	CAP Auto Truck Bus greater 5000	Default Program Code		

FOAPAL Codes Values vary by line.

15.

16.

15. Click the **Final Review** step in the draft requisition review work flow to return to the Requisition Summary.
16. Click **Submit Requisition** button to complete the cart and create the requisition.
17. This completes the procedure.

PRINT REQUISITION DETAIL

Last Updated on: 4/15/2020

The screenshot shows the 'Submit Requisition' button highlighted with a yellow box and an arrow pointing to it. A yellow message box contains the text: 'All done! The required information has been completed and this request is ready to be submitted. Once you have reviewed the details, you may continue by clicking the button at the top of the page.' The page displays a requisition summary with tabs for 'General', 'Internal Note', and 'Order Info'. The 'General' tab is active, showing details like Priority (Normal), Department (Administration and Finance), and Cart Name (2020-04-14 brownb 01). The 'Internal Note' tab shows a business purpose and state exemption. The 'Order Info' tab shows backup requirements and PO clauses.

1

1. Click **Submit Requisition** button to complete the cart and create the requisition.

The screenshot shows the 'Requisition Submitted' confirmation page. A green message box contains the text: 'Requisition Submitted' and 'Next Steps'. The 'Next Steps' section lists several options: 'View Approval Status', 'Search for another item', 'View order history', 'Check the status of an order', 'Return to your home page', and 'Create new draft cart'. Below the message box is a 'Requisition Summary' table with the following data:

Field	Value
Requisition number	2946357 Quick View
Requisition status	Pending
Cart name	2020-04-14 brownb 01
Requisition date	4/16/2020
Requisition total	74,191.00 USD
Number of line items	2

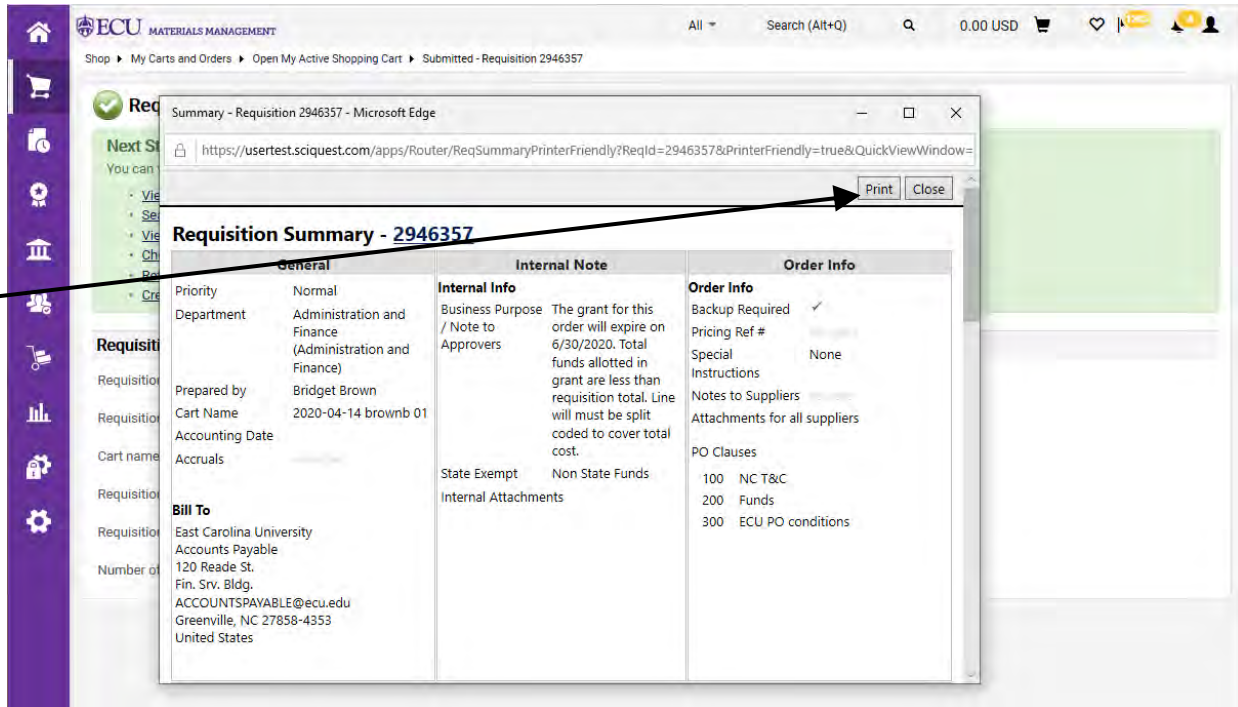
2.

3.

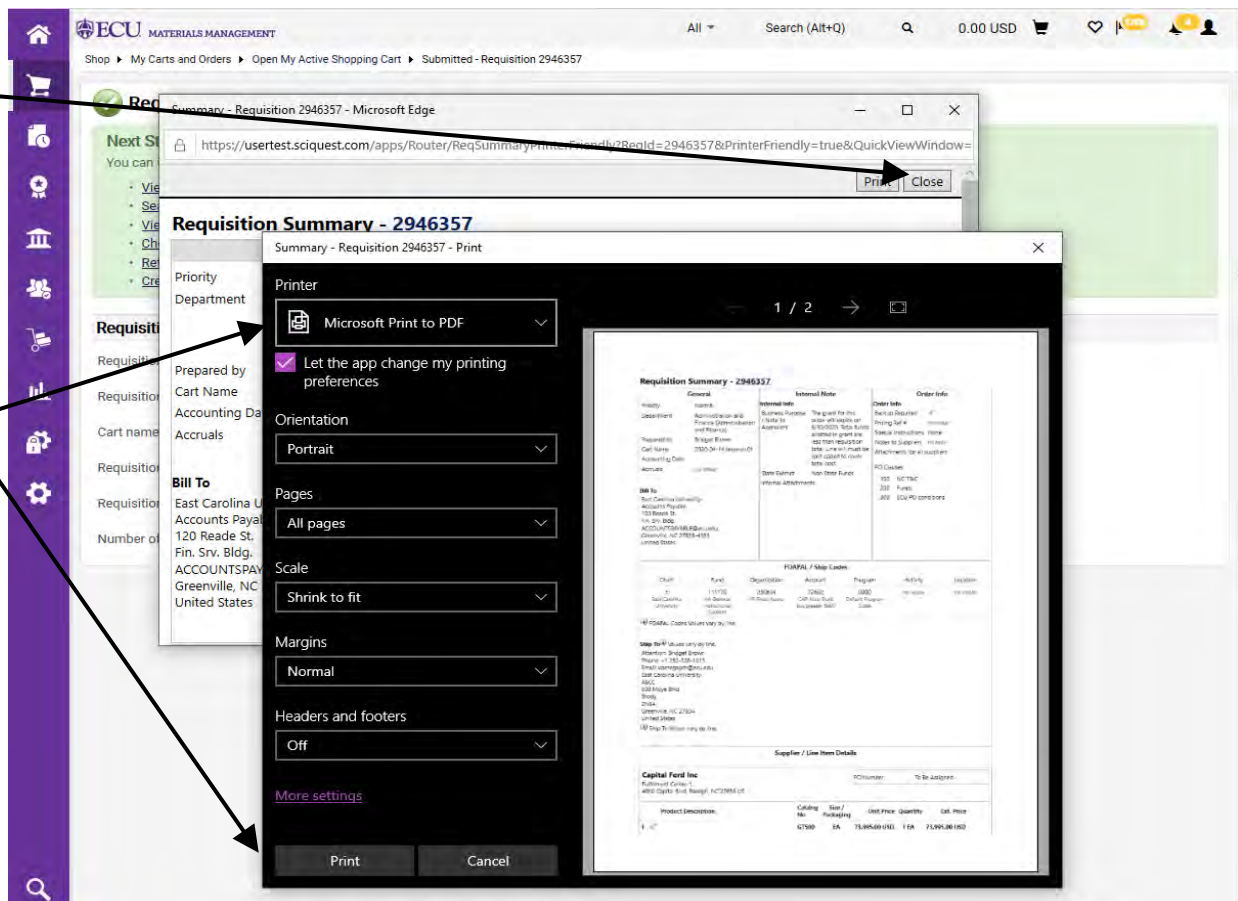
2. Notice some available options now that you have completed the requisition.
3. To print a copy of the requisition, click on the **Quick View** link.

PRINT REQUISITION DETAIL

Last Updated on: 4/15/2020



4. Click on the **Print** button from the Quick View overlay window.



5. After selecting the appropriate printer, click the **Print** button.

6. Click **Close** button for the Quick View overlay window.

PRINT REQUISITION DETAIL

Last Updated on: 4/15/2020

Requisition Submitted

Next Steps
 You can view or print this at: Requisition 2946357, or via the Search Requisitions page

- View Approval Status
- Search for another item
- View order history
- Check the status of an order
- Return to your home page
- Create new draft cart

Requisition Summary

Requisition number	2946357 Quick View
Requisition status	Pending
Cart name	2020-04-14 brownb 01
Requisition date	4/16/2020
Requisition total	74,191.00 USD
Number of line items	2

7. To see additional information on the document, click on the **requisition #**.

Requisition Summary

Available Actions: Assign to myself

Summary | General | **FOAPAL / Ship Codes** | Supplier Info | Taxes/5&H

General		Internal Note		Order Info	
Priority	Normal	Internal Info		Order Info	
Department	Administration and Finance (Administration and Finance)	Business Purpose / Note to Approvers	The grant for this order will expire on 6/30/2020. Total funds allotted in grant are less than re... more...	Backup Required	✓
Prepared by	Bridget Brown	State Exempt	Non State Funds	Pricing Ref #	no value
Cart Name	2020-04-14 brownb 01	Internal Attachments		Special Instructions	None
Accounting Date	no value	Mustang Quote.pdf		Notes to Suppliers	no note
Accruals	no value	Vehicle_Options.pdf		Attachments for all suppliers	
Bill To	East Carolina University Accounts Payable 120 Reade St. Fin. Srv. Bldg. ACCOUNTSPAYABLE@ecu.edu Greenville, NC 27858-4353 United States	Warranty_Informat...		PO Clauses	
				100 NC T&C	
				200 Funds	
				300 ECU PO conditions	
					view all clauses - (3)

View/edit by line item...

FOAPAL / Ship Codes						
Chart	Fund	Organization	Account	Program	Activity	Location
E East Carolina University	111170 AA General Institutional Support	230604 AF Fixed Assets	72602 CAP Auto Truck Bus greater 5000	0000 Default Program Code	no value	no value

8. To view a detailed version of the requisition, click on the **FOAPAL / Ship Codes** tab.

PRINT REQUISITION DETAIL

Last Updated on: 4/15/2020

ECU MATERIALS MANAGEMENT

Orders > Search > Requisitions > FOAPAL / Ship Codes - Requisition 2946357

Available Actions: Assign to myself **Go**

Requestion PR Approvals PO Preview Comments Attachments (3) History

Summary General **FOAPAL / Ship Codes** Supplier Info Taxes/S&H

Hide value descriptions

FOAPAL / Ship Codes

These values apply to all lines unless specified by line item

Chart	Fund	Organization	Account	Program	Activity	Location
E	111170	230604	72602	0000	no value	no value
East Carolina University	AA General Institutional Support	AF Fixed Assets	CAP Auto Truck Bus greater 5000	Default Program Code		

FOAPAL Codes Values vary by line.

Ship To Values vary by line.
Shipping address

Attention: Bridget Brown
Phone: +1 252-328-1013
Email: kornegaych@ecu.edu
East Carolina University
ASCC
600 Moye Blvd
Brody
2N64
Greenville, NC 27834
United States

Ship To Values vary by line.

9. Click the **printer icon**.

ECU MATERIALS MANAGEMENT

Orders > Search > Requisitions > FOAPAL / Ship Codes - Requisition 2946357

Available Actions: Assign to myself **Go**

Requestion PR Approvals PO Preview Comments Attachments (3) History

Summary General **FOAPAL / Ship Codes** Supplier Info Taxes/S&H

Hide value descriptions

FOAPAL / Ship Codes - Requisition 2946357

These values apply to all lines unless specified by line item

Chart	Fund	Organization	Account	Program	Activity	Location
E	111170	230604	72602	0000	no value	no value
East Carolina University	AA General Institutional Support	AF Fixed Assets	CAP Auto Truck Bus greater 5000	Default Program Code		

FOAPAL Codes Values vary by line.

Ship To Values vary by line.
Shipping address

Attention: Bridget Brown
Phone: +1 252-328-1013
Email: kornegaych@ecu.edu
East Carolina University
ASCC
600 Moye Blvd
Brody
2N64
Greenville, NC 27834
United States

Ship To Values vary by line.

Supplier / Line Item Details

Product Description	Catalog no	Unit Price	Quantity	Ext. Price
2020 Shelby Mustang GT500 Metallic Blue with White Racing Stripes	GT500	EA	73,995.00	1 EA 73,995.00 USD

FOAPAL Codes

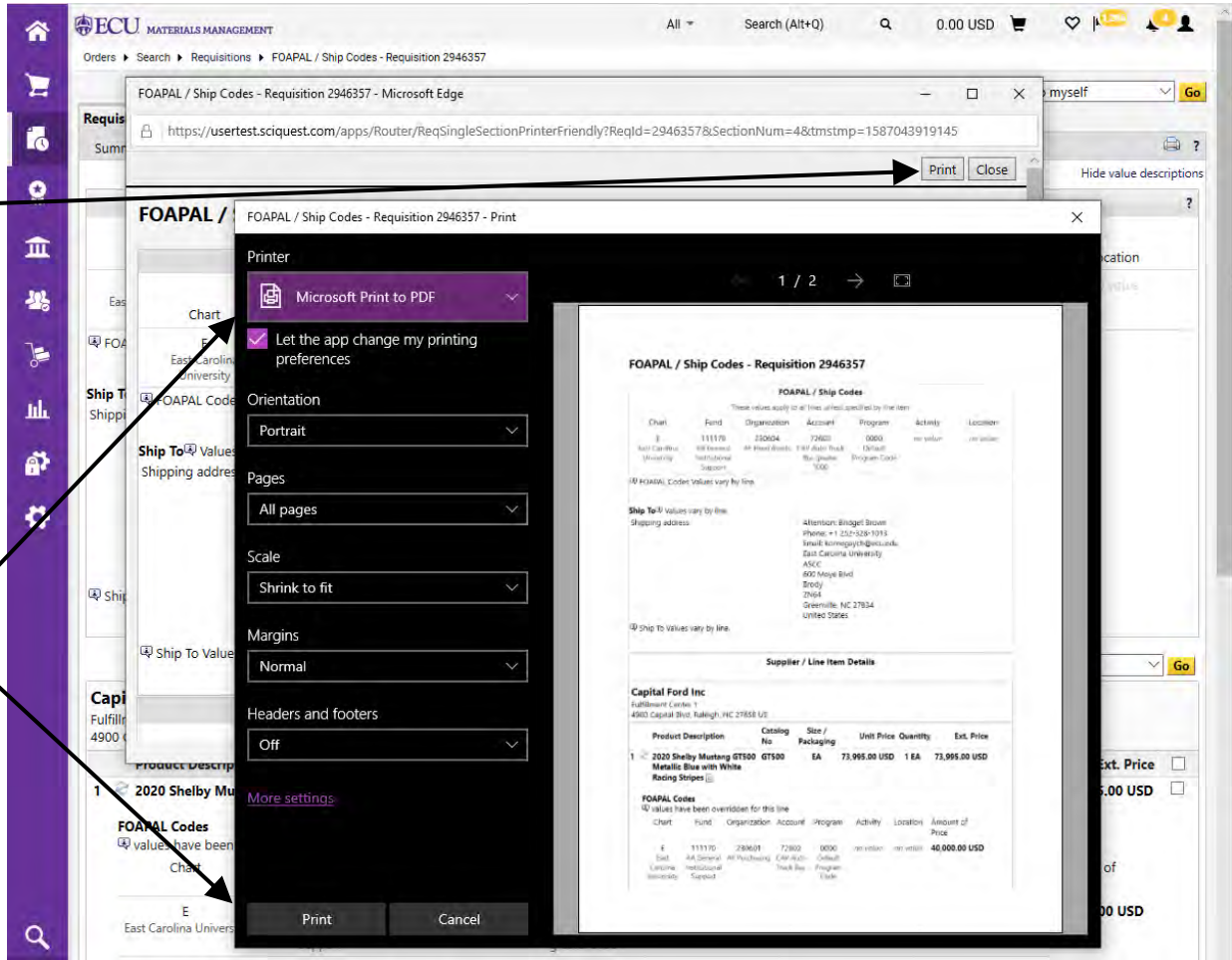
values have been overridden for this line

Chart	Fund	Organization	Account	Program	Activity	Location	Amount of Price
E	111170	230601	72602	0000			40,000.00 USD
East Carolina University	AA General Institutional Support	AF Purchasing	CAP Auto Truck Bus greater 5000	Default Program Code			

10. This brings up a printer friendly view of the requisition. Click on the **Print** button.

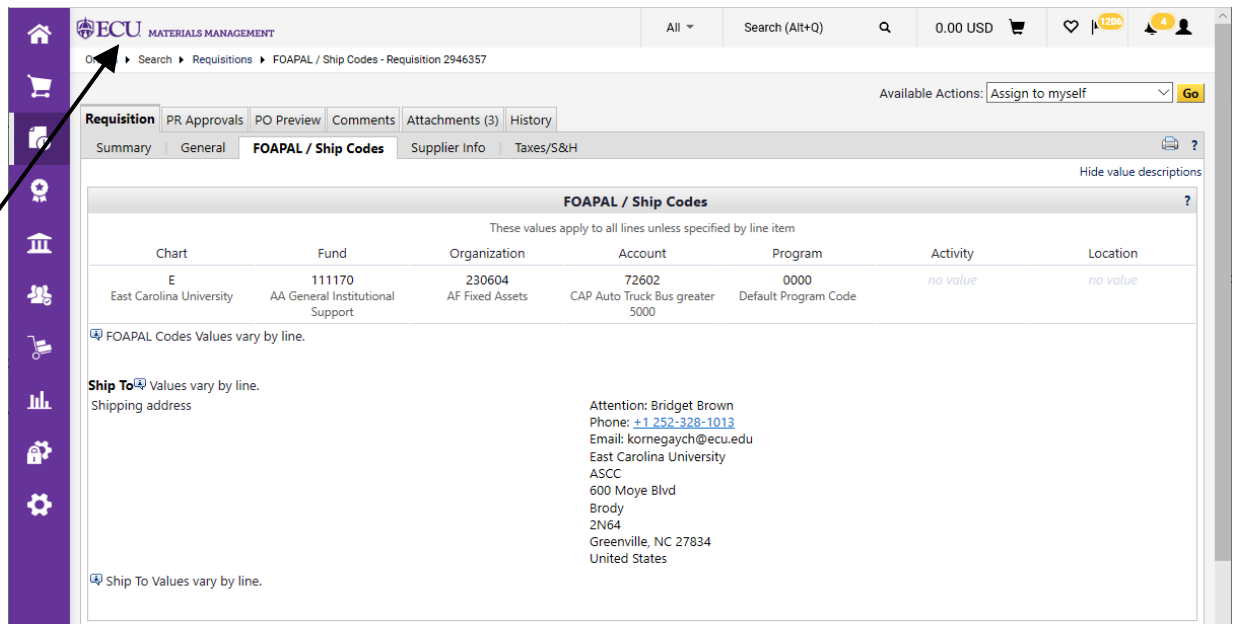
PRINT REQUISITION DETAIL

Last Updated on: 4/15/2020



11. After selecting the appropriate printer, click the **Print** button.

12. Click on the **Close** button to close the printer friendly view.



13. This completes the steps for this procedure. Click the **ECU** icon to go to home page.

MOVE TO NEW CART

Last Updated on: 4/8/2020

Shopping Cart for Bridget Brown

46 Item(s) for a total of 3,668.44 USD

Proceed to Checkout

Priority: Normal, Business Purpose / Note to Approvers: State Exempt, Backup Required: []

Prepared by: Bridget Brown, Prepared for: Bridget Brown, Cart Name: 2020-04-03 brownb 01

Supplier / Line Item Details

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 OptiPlex 5040	54889	EA	695.89	4 EA	2,783.56 USD
2 Wireless Keyboard/Mouse kit	11012	EA	53.25	4 EA	213.00 USD
3 4yr Complete Service	111247	EA	119.00	4 EA	476.00 USD
Supplier subtotal					3,472.56 USD

ECU Medical Storeroom

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
4 NITRILE POWDER FREE LARGE BOX DELTA ACG-120 NITREX	120-23440	1/BX	6.14	20 BX	122.80 USD
5 ALCOHOL PREPS LARGE 200/BOX KENDALL S110	040-21020	1/BX	5.22	7 BX	36.54 USD
6 ALCOHOL PREPS LARGE 200/BOX KENDALL S110	040-21020	1/BX	5.22	7 BX	36.54 USD
Supplier subtotal					195.88 USD
Subtotal					3,668.44
Shipping					0.00
Handling					0.00
Total					3,668.44 USD

1. PORT restricts requisitions to one supplier only. To move items for one supplier to a separate cart click the check box beside the **Ext Price** column to select all the items for the 1st supplier.

Shopping Cart for Bridget Brown

46 Item(s) for a total of 3,668.44 USD

Proceed to Checkout

Priority: Normal, Business Purpose / Note to Approvers: State Exempt, Backup Required: []

Prepared by: Bridget Brown, Prepared for: Bridget Brown, Cart Name: 2020-04-03 brownb 01

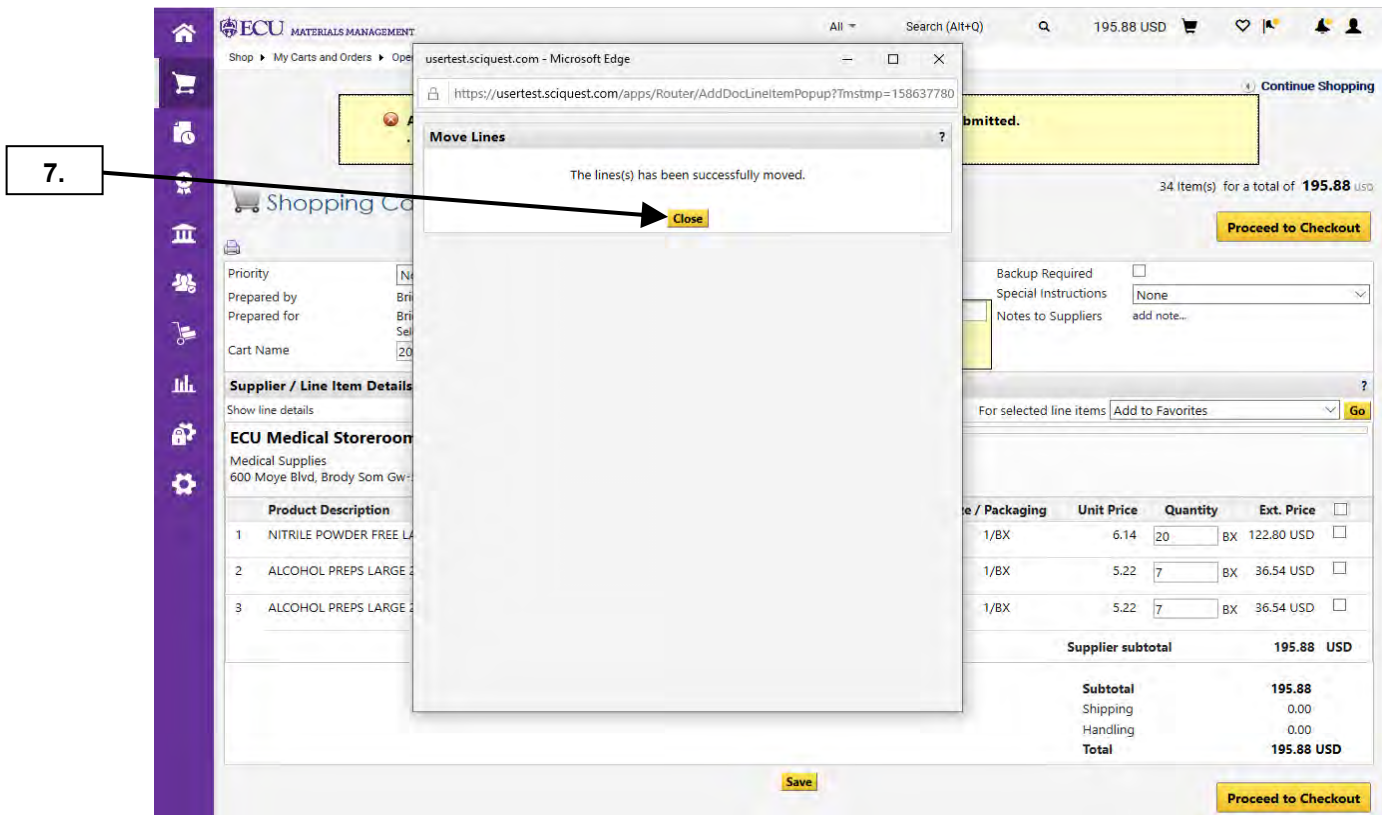
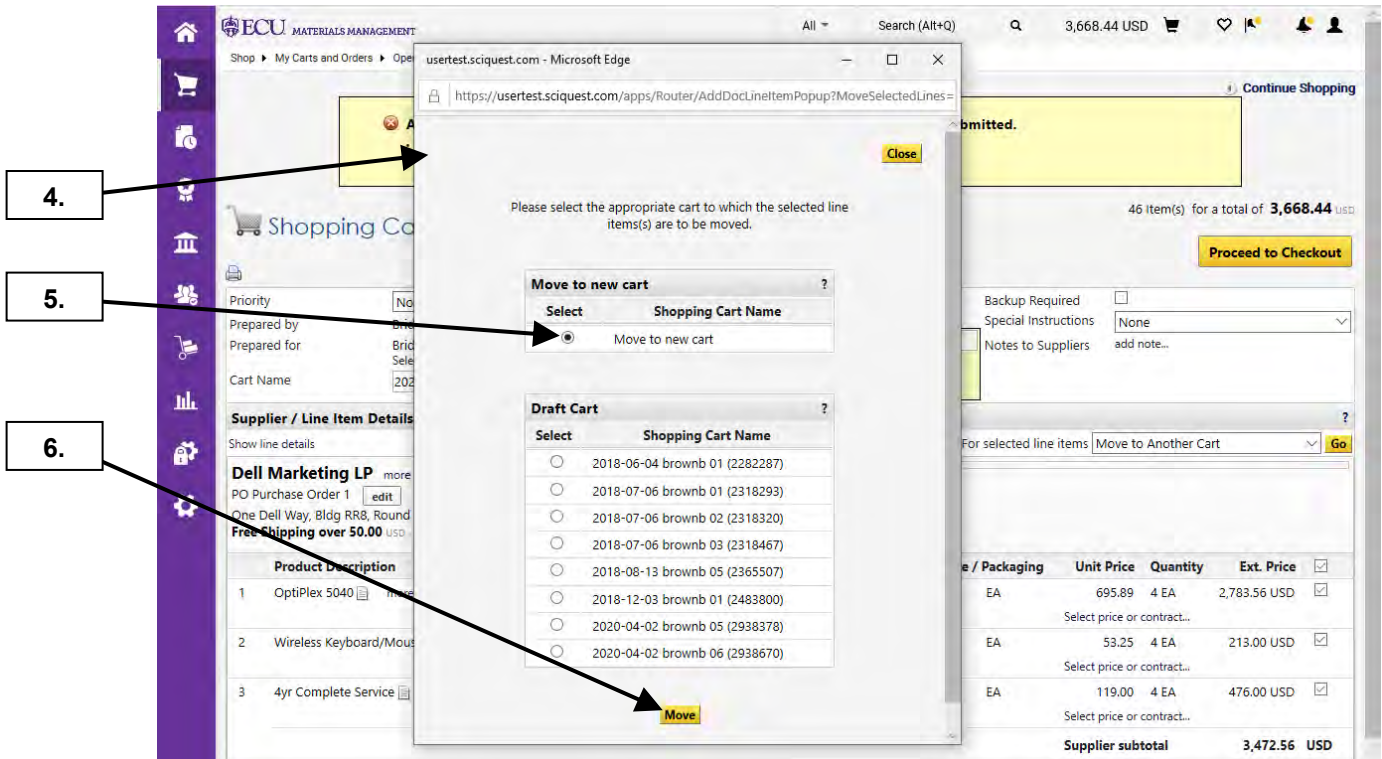
Supplier / Line Item Details

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 OptiPlex 5040	54889	EA	695.89	4 EA	2,783.56 USD
2 Wireless Keyboard/Mouse kit	11012	EA	53.25	4 EA	213.00 USD
3 4yr Complete Service	111247	EA	119.00	4 EA	476.00 USD
Supplier subtotal					3,472.56 USD

2. Select **Move to Another Cart** For selected line items drop down box.
3. Click on the **Go** button.

MOVE TO NEW CART

Last Updated on: 4/8/2020



MOVE TO NEW CART

Last Updated on: 4/8/2020

ECU MATERIALS MANAGEMENT | All | Search (Alt+Q) | 195.88 USD

Shop > My Carts and Orders > Open My Active Shopping Cart > Cart - 2939324 - Draft Requisition

Continue Shopping

Shopping Cart for Bridget Brown | 34 Item(s) for a total of 195.88 USD

Save | Proceed to Checkout

Cart was saved successfully

Priority: Normal | Business Purpose / Note to Approvers: Health Care | Backup Required: | Special Instructions: None

Prepared by: Bridget Brown | State Exempt: Health Care | Notes to Suppliers: add note...

Prepared for: Bridget Brown | Select from profile values... | Select from all values...

Cart Name: 2020-04-03 brownb 01

Supplier / Line Item Details

Show line details | For selected line items: Add to Favorites | Go

ECU Medical Storeroom | Medical Supplies | 600 Moye Blvd, Brody Som Gw-56, Greenville, NC 27834 US

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 NITRILE POWDER FREE LARGE BOX DELTA ACG-120 NITREX	120-23440	1/BX	6.14	20 BX	122.80 USD
2 ALCOHOL PREPS LARGE 200/BOX KENDALL 5110	040-21020	1/BX	5.22	7 BX	36.54 USD
3 ALCOHOL PREPS LARGE 200/BOX KENDALL 5110	040-21020	1/BX	5.22	7 BX	36.54 USD

Supplier subtotal: 195.88 USD

Subtotal: 195.88 | Shipping: 0.00 | Handling: 0.00 | Total: 195.88 USD

Save | Proceed to Checkout

8. Click on the **Proceed to Checkout** button to continue the review process.

ECU MATERIALS MANAGEMENT | All | Search (Alt+Q) | 195.88 USD

Orders > Search > Requisitions > Summary - 2939324 - Draft Requisition

General | Internal Note | Order Info | FOAPAL / Ship Codes | Final Review | Submit Requisition

Go to Express Checkout | Return to shopping cart | Continue Shopping

All done! The required information has been completed and this request is ready to be submitted. Once you have reviewed the details, you may continue by clicking the button at the top of the page.

Requisition | PR Approvals | PO Preview | Comments | Attachments | History

Summary | General | FOAPAL / Ship Codes | Supplier Info | Taxes/S&H

Hide header | Hide value descriptions

General | Internal Note | Order Info

Priority: Normal | Internal Info: Business Purpose / Note to Approvers: Health Care | Order Info: Backup Required: x, Pricing Ref #: no value, Special Instructions: None, Notes to Suppliers: no note

Department: Administration and Finance (Administration and Finance) | Internal Attachments: Add Attachments

Prepared by: Bridget Brown | PO Clauses: 100 NC T&C, 200 Funds, 300 ECU PO conditions

Prepared for: Bridget Brown

Cart Name: 2020-04-03 brownb 01

Accounting Date: no value

Accruals: no value

Bill To: East Carolina University, Accounts Payable, 120 Reade St, Fin. Srv. Bldg, ACCOUNTSPAYABLE@ecu.edu, Greenville, NC 27858-4353, United States

View/edit by line item...

FOAPAL / Ship Codes

Chart	Fund	Organization	Account	Program	Activity	Location
E	111170	230603	72110	0000	no value	no value
East Carolina University	AA General Institutional Support	AF Medical Stores	Office Supplies	Default Program Code		

9. See the **Edit Cart Header, Edit Cart Items, Review Cart Header, and Review Cart Items** procedures to continue the review process. Since all the FOAP and ship code info is correct, the cart will be completed by clicking on **Submit Requisition** button.

MOVE TO NEW CART

Last Updated on: 4/8/2020

Shop > My Carts and Orders > Open My Active Shopping Cart > Submitted - Requisition 2939324

Requisition Summary

Requisition number	2939324 Quick View
Requisition status	Pending
Cart name	2020-04-03 brownb 01
Requisition date	4/8/2020
Requisition total	195.88 USD
Number of line items	3

10. Click on **Open My Active Shopping Cart** link and select **View Carts**.

Shop > My Carts and Orders > View Carts > Draft Carts

Cart Management

Draft Carts | Assigned Carts | Shared Carts

Filter Draft Carts

1-9 of 9 Results

Type	Cart Number	Shopping Cart Name	Cart Description	Date Created	Total	Action
Normal	2282287	2018-06-04 brownb 01		6/4/2018	4,250.67 USD	View
Normal	2318293	2018-07-06 brownb 01		7/6/2018	49,786.80 USD	View
Normal - Returned	2318320	2018-07-06 brownb 02		7/6/2018	1,521.00 USD	View
Normal	2318467	2018-07-06 brownb 03		7/6/2018	42.30 USD	View
Normal	2365507	2018-08-13 brownb 05		8/13/2018	0.00 USD	View
Normal	2483800	2018-12-03 brownb 01		12/3/2018	749.75 USD	View
Normal	2938378	2020-04-02 brownb 05		4/2/2020	53,265.65 USD	View
Normal	2938670	2020-04-02 brownb 06		4/2/2020	2,227.54 USD	View
Normal	2943781	2020-04-08 brownb 01		4/8/2020	3,472.56 USD	View

1-9 of 9 Results

11. Click on the draft shopping cart for the items that were moved in steps 2 – 7.

MOVE TO NEW CART

Last Updated on: 4/8/2020

Shop > My Carts and Orders > Open My Active Shopping Cart > Cart - 2943781 - Draft Requisition

Continue Shopping

Almost ready to go! The list below needs to be addressed before the cart can be submitted.

- Required field: State Exempt

12 Item(s) for a total of **3,472.56** USD

Proceed to Checkout

Save

Priority: Normal
Prepared by: Bridget Brown
Prepared for: Bridget Brown
Cart Name: 2020-04-08 brownb 01

Business Purpose / Note to Approvers: State Exempt

Backup Required:
Special Instructions: None
Notes to Suppliers: add note...

Supplier / Line Item Details

Show line details For selected line items: Add to Favorites Go

Dell Marketing LP
PO Purchase Order 1
One Dell Way, Bldg RR8, Round Rock, TX 78682-0384 US
Free Shipping over 50.00 USD

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 OptiPlex 5040	54889	EA	695.89	4 EA	2,783.56 USD
2 Wireless Keyboard/Mouse kit	11012	EA	53.25	4 EA	213.00 USD
3 4yr Complete Service	111247	EA	119.00	4 EA	476.00 USD
Supplier subtotal					3,472.56 USD
Subtotal					3,472.56
Shipping					0.00
Handling					0.00
Total					3,472.56 USD

Save

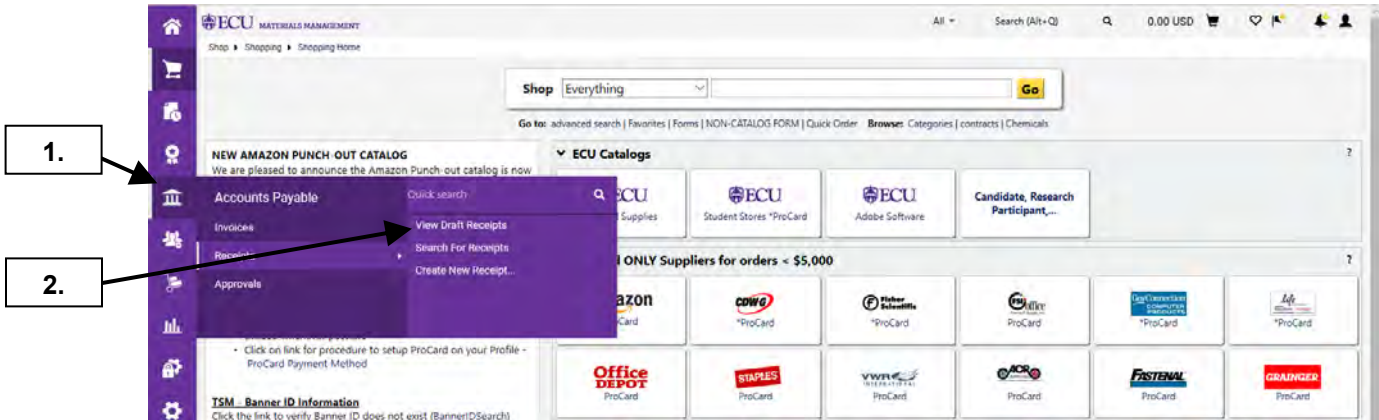
Proceed to Checkout

12.

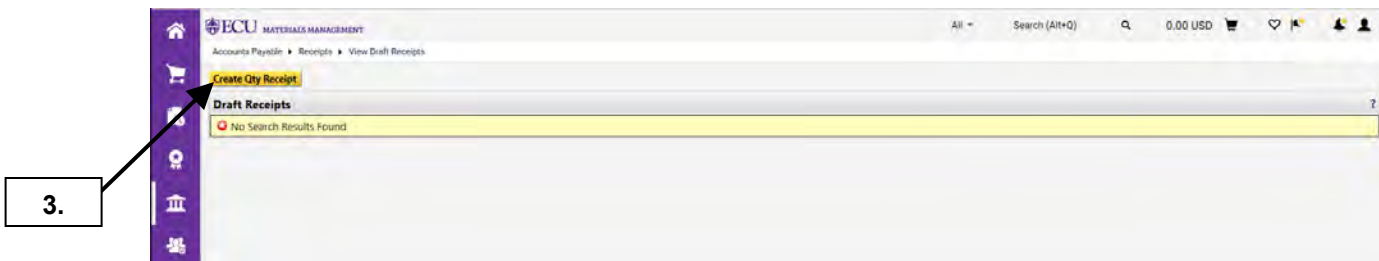
12. This completes the steps for this procedure. See the **Edit Cart Header, Edit Cart Items, Review Cart Header, and Review Cart Items** procedures to continue the review process.

RECEIVING

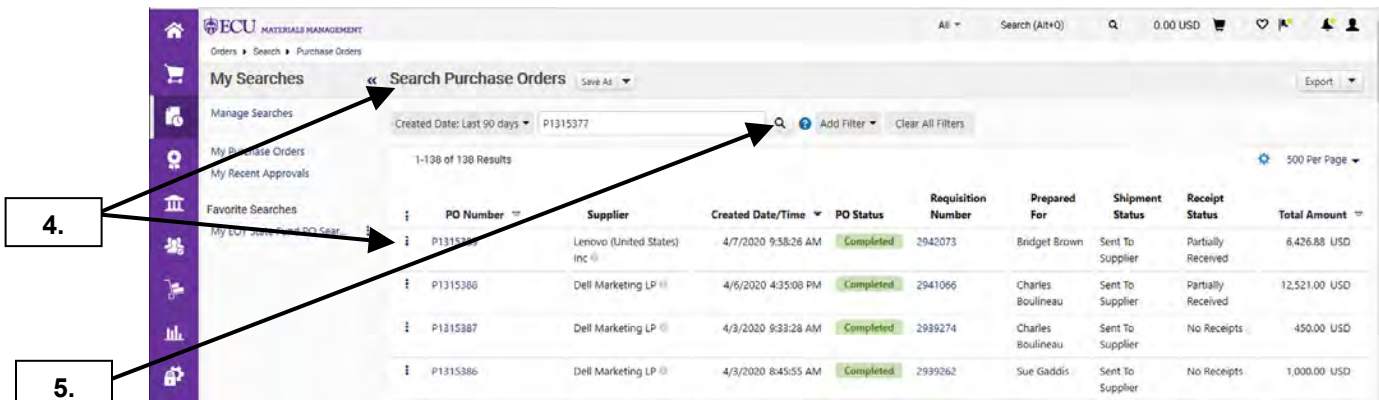
Last Updated on: 4/08/2020



1. Hover on the **Accounts Payable** icon on the navigation pane then **Receipts**.
2. Click on the **View Draft Receipts** link.
Note: Receipts are not required for **Medical Storeroom, Student Stores, or ProCard** orders. For return receipts, see the **Return Process** procedure.



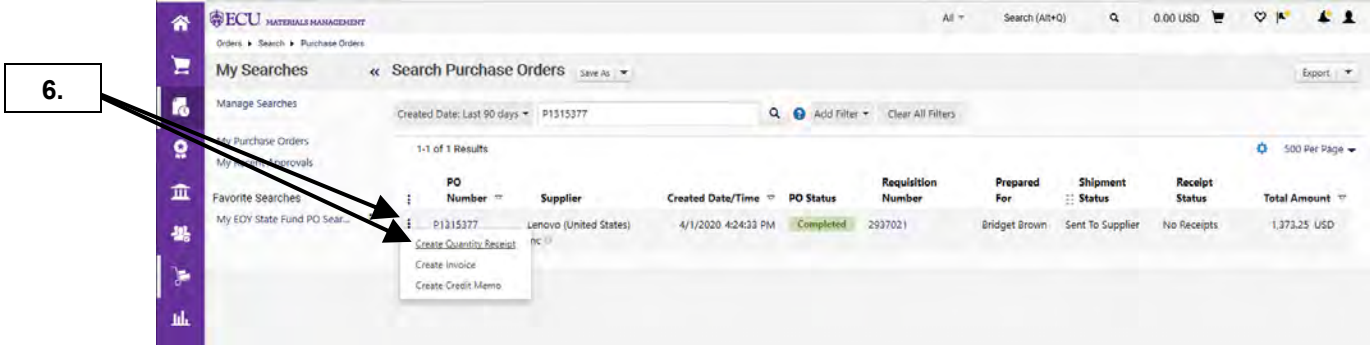
3. Click on **Create Qty Receipt** button.



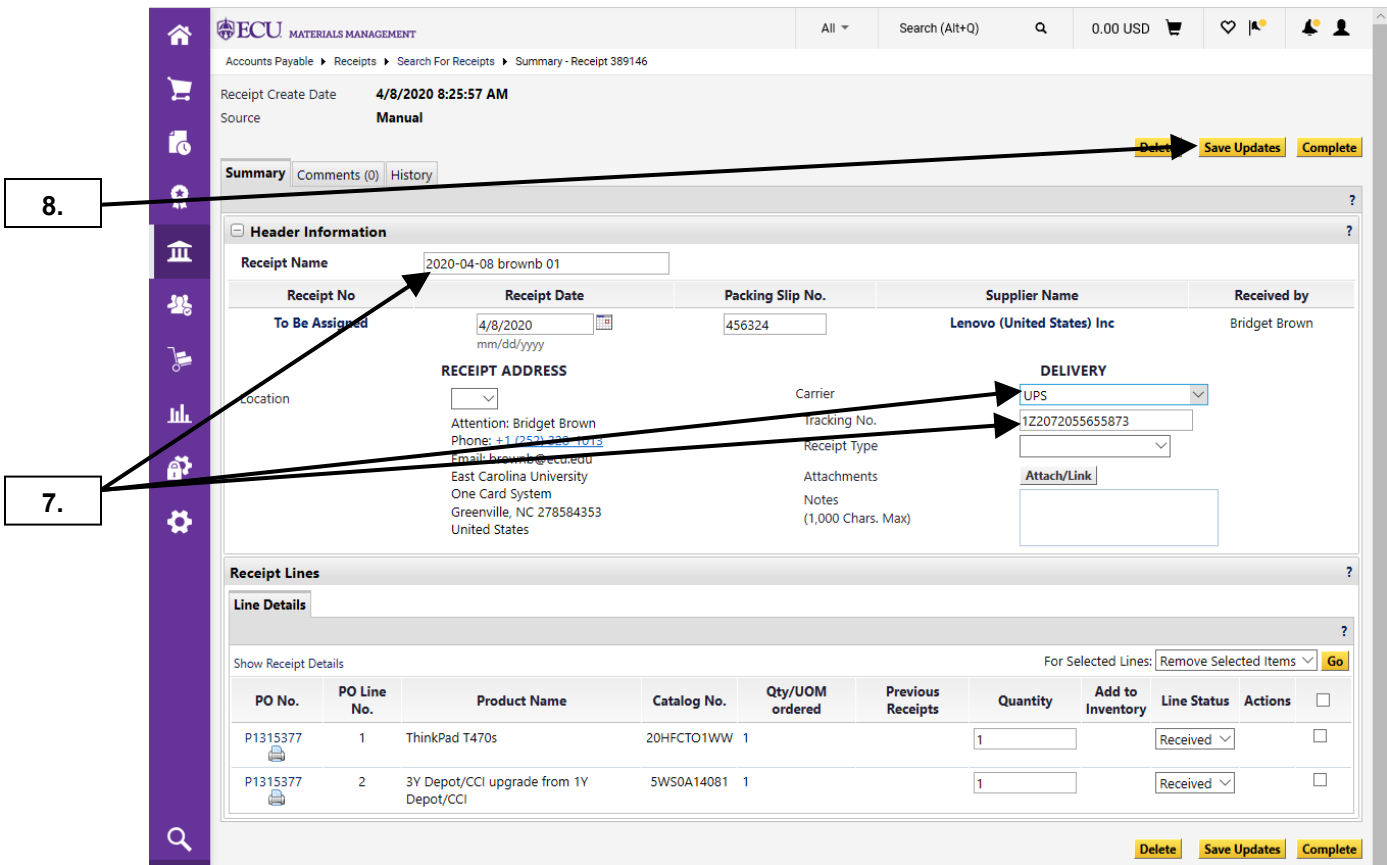
4. The **Search Purchase Orders** feature is launched. Enter the PO # in the search field, select from the list, or change the search parameters to find your purchase order needing a receipt.
5. For this example, the PO number is entered in the search field. Click the **Search** icon.

RECEIVING

Last Updated on: 4/08/2020



- Click the **Action** icon to launch the Action Options. Click **Create Quantity Receipt**.
Note: If PO review is needed, click on the PO number to launch the document prior to creating a receipt.



- Enter the appropriate **Header Information** for the following: **Receipt Name, Packing Slip No., Carrier, Tracking No., Attachments, and Notes**.
Note: This header information is optional.
- Click the **Save Updates** button.

RECEIVING

Last Updated on: 4/08/2020

ECU MATERIALS MANAGEMENT

Accounts Payable > Receipts > Search For Receipts > Summary - Receipt 389146

Receipt Create Date: 4/8/2020 8:25:57 AM
Source: Manual

Buttons: Delete, Save Updates, Complete

Summary | Comments (0) | History

Header Information

Receipt Name: 2020-04-08 brownb 01

Receipt No	Receipt Date	Packing Slip No.	Supplier Name	Received by
To Be Assigned	4/8/2020 <small>mm/dd/yyyy</small>	456324	Lenovo (United States) Inc	Bridget Brown

RECEIPT ADDRESS

Location:

Attention: Bridget Brown
Phone: +1 (252) 328-1013
Email: brownb@ecu.edu
East Carolina University
One Card System
Greenville, NC 278584353
United States

CARRIER

Carrier: UPS
Tracking No.: 1Z2072055655873
Receipt Type:

DELIVERY

Attachments: Attach/Link
Notes: (1,000 Chars. Max)

Receipt Lines

Line Details

PO No.	PO Line No.	Product Name	Catalog No.	Qty/UOM ordered	Previous Receipts	Quantity	Add to Inventory	Line Status	Actions
P1315377	1	ThinkPad T470s	20HFCT01WW	1		1		Received	
P1315377	2	3Y Depot/CCI upgrade from 1Y Depot/CCI	5WS0A14081	1		1		Received	

Buttons: Delete, Save Updates, Complete

9.

9. Notice that the first time you complete a receipt on a PO, the system defaults to the number of items ordered. If all items were delivered on the first shipment, proceed to steps 14 & 15 to complete the receipt.

ECU MATERIALS MANAGEMENT

Accounts Payable > Receipts > Search For Receipts > Summary - Receipt 389146

Receipt Create Date: 4/8/2020 8:25:57 AM
Source: Manual

Buttons: Delete, Save Updates, Complete

Summary | Comments (0) | History

Header Information

Receipt Name: 2020-04-08 brownb 01

Receipt No	Receipt Date	Packing Slip No.	Supplier Name	Received by
To Be Assigned	4/8/2020 <small>mm/dd/yyyy</small>	456324	Lenovo (United States) Inc	Bridget Brown

RECEIPT ADDRESS

Location:

Attention: Bridget Brown
Phone: +1 (252) 328-1013
Email: brownb@ecu.edu
East Carolina University
One Card System
Greenville, NC 278584353
United States

CARRIER

Carrier: UPS
Tracking No.: 1Z2072055655873
Receipt Type:

DELIVERY

Attachments: Attach/Link
Notes: (1,000 Chars. Max)

Receipt Lines

Line Details

PO No.	PO Line No.	Product Name	Catalog No.	Qty/UOM ordered	Previous Receipts	Quantity	Add to Inventory	Line Status	Actions
P1315377	1	ThinkPad T470s	20HFCT01WW	1		1		Received	
P1315377	2	3Y Depot/CCI upgrade from 1Y Depot/CCI	5WS0A14081	1		0		Received	

Buttons: Delete, Save Updates, Complete

11.

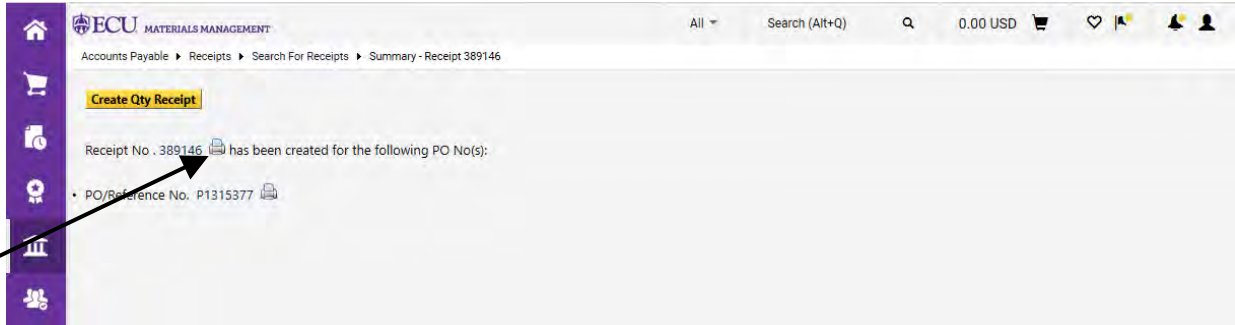
12.

10.

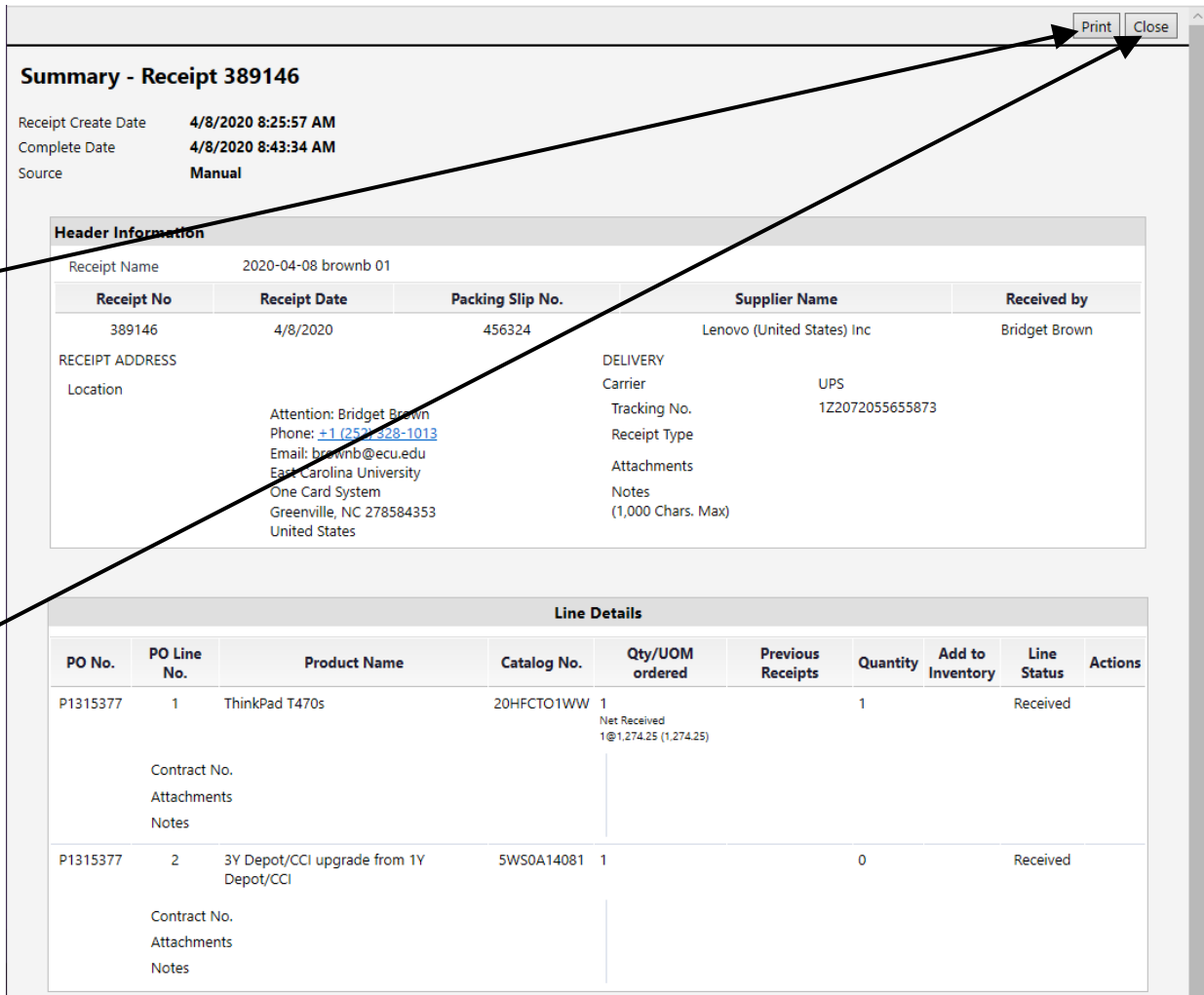
10. Change the # of items to the actual quantity delivered in the first shipment.
Note: In this example, we will enter 0 for PO Line No. 2 in the first shipment.
11. Click the **Save Updates** button.
12. Click the **Complete** button to complete the receipt for the 1st shipment.

RECEIVING

Last Updated on: 4/08/2020



13. Click on the **Printer** icon if you need a printed copy of the receipt.



14. This brings up a printer friendly view of the receipt. Click **Print** button if a printed copy of the receipt is needed.

15. Close the browser window.

RECEIVING

Last Updated on: 4/08/2020

Accounts Payable > Receipts > Search For Receipts > Summary - Receipt 389146

Receipt Create Date: 4/8/2020 8:25:57 AM
Source: Manual

Available Actions: Add Notes to History

Summary | Comments (0) | History

Header Information

Receipt Name: 2020-04-08 brownb 01 Complete Date: 4/8/2020 8:43:34 AM

Receipt No	Receipt Date	Packing Slip No.	Supplier Name	Received by
389146	4/8/2020	456324	Lenovo (United States) Inc	Bridget Brown

RECEIPT ADDRESS

Location: Attention: Bridget Brown
Phone: +1 (252) 328-1013
Email: brownb@ecu.edu
East Carolina University
One Card System
Greenville, NC 278584353
United States

DELIVERY

Carrier: UPS
Tracking No.: 1Z2072055655873

Receipt Lines

Line Details

Show Receipt Details

PO No.	PO Line No.	Product Name	Catalog No.	Qty/UOM ordered	Previous Receipts	Quantity	Add to Inventory	Line Status	Actions	Add to Chemical Inventory
P1315377	1	ThinkPad T470s	20HFCT01WW	1		1		Received		<input type="button" value="Add"/>
				Net Received 1 @ 1,274.25 (1,274.25)						
P1315377	2	3Y Depot/CCI upgrade from 1Y Depot/CCI	SWS0A14081	1		0		Received		<input type="button" value="Add"/>

16. This completes the steps for this first receipt for a PO. Click the **ECU** icon to go home.

Shop > Shopping > Shopping Home

Quick Search (Alt+Q): P1315377

Shop | Everything | Requisitions

Go to: advanced search | 2997921

NEW AMAZON PUNCH-OUT CATALOG
We are pleased to announce the Amazon Punch-out catalog is now available in PORT.

IMPORTANT

- ProCard is the only payment method allowed
- Maximum transaction limit of \$5,000
- All ProCard rules still apply
- If you were not a previous Amazon Business account user, you will need to add your ProCard to your profile in Amazon.
- All Purchasing rules apply and NC State contracts should be utilized whenever possible
- Click on link for procedure to setup ProCard on your Profile - ProCard Payment Method

TSM - Banner ID Information
Click the link to verify Banner ID does not exist (BannerIDSearch)
Click this link to search ECU PORT for suppliers (click here)
Request new supplier if it does not exist

Purchase Orders

Receipts

389146

amazon ProCard	CDWG *ProCard	Fisher Scientific *ProCard	Office Depot ProCard	COMPUTER PRODUCTS *ProCard	Life *ProCard
Office DEPOT ProCard	STAPLES ProCard	VWR INTERNATIONAL ProCard	ACRO ProCard	FASTENAL ProCard	GRAINGER ProCard
BIO-RAD ProCard	ProCard				

17. Enter the PO # in the **Quick Search** field.

Note: In this example, we are simulating that a second shipment was delivered to complete receiving for PO Line No. 2. Repeat these steps for every shipment until all the items have been received.

18. Click on magnifying glass to execute the **Quick Search** then click the **Purchase Order**.

RECEIVING

Last Updated on: 4/08/2020

Orders > Search > Purchase Orders > Status - PO P1315377

PO/Reference No. **P1315377 Revision 0** Available Actions [Add Comment](#) [Go](#)

Supplier **Lenovo (United States) Inc**

Status [Purchase Order](#) [Revisions](#) [PO Approvals](#) [Shipments](#) [Change Requests](#) **Receipts** [Invoices](#) [Comments](#) [Attachments \(1\)](#) [History](#)

General Information

PO/Reference No. **P1315377**

Revision No. 0

Supplier Name **Lenovo (United States) Inc** [more info...](#)

Purchase Order Date 4/1/2020

Total 1,373.25

Requisition Number 2937021 [view](#) | [print](#)

Requestor Name **Bridget Brown**

Requestor Email boulineauc@ecu.edu

Requestor Phone [+1 252-328-1013](tel:+12523281013)

Document Status

Workflow ✔ **Completed**
(4/1/2020 4:26 PM)

Distribution The system distributed the purchase order using the method(s) indicated below the last time it was distributed:
Email (Plain Text): b2btest@lenovo.com

Distribution Date/Time 4/1/2020 4:25 PM

Supplier Sent To Supplier [view](#)

Line Item Status

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	Supplier	Receiving	Invoicing	Matching
1 ✔ ThinkPad T470s more info...	20HFCTO1WW	EA	1,274.25	1 EA	1,274.25 USD	Sent To Supplier	Fully Received	none	Do not Match
2 ✔ 3Y Depot/CCI upgrade from 1Y Depot/CCI more info...	5WS0A14081	EA	99.00	1 EA	99.00 USD	Sent To Supplier	none	none	Do not Match
Subtotal								1,373.25	
Shipping								0.00	
Handling								0.00	
Total								1,373.25 USD	

- 19. Note the receiving status of the line items for the PO.
- 20. Click on the **Receipt** tab to see if there are existing receipts for the PO.

Orders > Search > Purchase Orders > Receipts - PO P1315377

< Back to Results 1 of 1 Results < >

PO/Reference No. **P1315377 Revision 0** Available Actions [Add Comment](#) [Go](#)

Supplier **Lenovo (United States) Inc**

Status [Purchase Order](#) [Revisions](#) [PO Approvals](#) [Shipments](#) [Change Requests](#) **Receipts** [Invoices](#) [Comments](#) [Attachments \(1\)](#) [History](#)

Receipts

Receipt No.	Receipt Date	Received by
389146 more info...	4/8/2020	Quantity Brown, Bridget

Receipt Line Details

No	Product Name	Catalog No.	Unit Price	Qty/UOM	Extended Price	Qty / Cost (In)	Qty / Cost (Out)	Status
1	more info... ThinkPad T470s	20HFCTO1WW	1,274.25 USD	1 EA	1,274.25 USD	1		Net Received
2	more info... 3Y Depot/CCI upgrade from 1Y Depot/CCI	5WS0A14081	99.00 USD	1 EA	99.00 USD	1		Open

- 21. Click on **Available Actions** dropdown box and select **Create Quantity Receipt**.
- 22. Click on **Go** button.

RECEIVING

Last Updated on: 4/08/2020

Accounts Payable > Receipts > Search For Receipts > Summary - Receipt 389134

Receipt Create Date: 4/8/2020 11:50:39 AM
Source: Manual

Summary | Comments (0) | History

Exact Match: PO No. P1315377

Header Information

Receipt Name: 2020-04-08 brownb 02

Receipt No.	Receipt Date	Packing Slip No.	Supplier Name	Received by
To Be Assigned	4/8/2020 <small>mm/dd/yyyy</small>	1433455	Lenovo (United States) Inc	Bridget Brown

RECEIPT ADDRESS

Location: [Dropdown]
Attention: Bridget Brown
Phone: +1 (252) 328-1013
Email: brownb@ecu.edu
East Carolina University
One Card System
Greenville, NC 278584353
United States

DELIVERY

Carrier: UPS
Tracking No.: 1Z2020356488987
Receipt Type: [Dropdown]
Attachments: Attach/Link
Notes: (1,000 Chars. Max)

Receipt Lines

Line Details

Show Receipt Details

PO No.	PO Line No.	Product Name	Catalog No.	Qty/UOM ordered	Previous Receipts	Quantity	Add to Inventory	Line Status	Actions
P1315377	1	ThinkPad T470s	20HFCT01WW	1	389146	0		Received	
P1315377	2	3Y Depot/CCI upgrade from 1Y Depot/CCI	5WS0A14081	1	389146	1		Received	

For Selected Lines: Remove Selected Items | Go

Buttons: Delete | Save Updates | Complete

23. Enter the appropriate **Header Information** for the following: **Receipt Name, Packing Slip No., Carrier, Tracking No., Attachments, and Notes.** **Note:** This header information is optional.
24. Click the **Save Updates** button.

Accounts Payable > Receipts > Search For Receipts > Summary - Receipt 389134

Receipt Create Date: 4/8/2020 11:50:39 AM
Source: Manual

Summary | Comments (0) | History

Exact Match: PO No. P1315377

Header Information

Receipt Name: 2020-04-08 brownb 02

Receipt No.	Receipt Date	Packing Slip No.	Supplier Name	Received by
To Be Assigned	4/8/2020 <small>mm/dd/yyyy</small>	1433455	Lenovo (United States) Inc	Bridget Brown

RECEIPT ADDRESS

Location: [Dropdown]
Attention: Bridget Brown
Phone: +1 (252) 328-1013
Email: brownb@ecu.edu
East Carolina University
One Card System
Greenville, NC 278584353
United States

DELIVERY

Carrier: UPS
Tracking No.: 1Z2020356488987
Receipt Type: [Dropdown]
Attachments: Attach/Link
Notes: (1,000 Chars. Max)

Receipt Lines

Line Details

Show Receipt Details

PO No.	PO Line No.	Product Name	Catalog No.	Qty/UOM ordered	Previous Receipts	Quantity	Add to Inventory	Line Status	Actions
P1315377	1	ThinkPad T470s	20HFCT01WW	1	389146	0		Received	
P1315377	2	3Y Depot/CCI upgrade from 1Y Depot/CCI	5WS0A14081	1	389146	1		Received	

For Selected Lines: Remove Selected Items | Go

Buttons: Delete | Save Updates | Complete

25. Notice that the receipt now has **1** in quantity for PO Line No. 2 and **0** for PO Line No. 1.
Note: PORT automatically calculates the remaining quantities to be received after the 1st receipt.
26. Notice our 1st receipt # listed in the **Previous Receipts** column.

RECEIVING

Last Updated on: 4/08/2020

Accounts Payable > Receipts > Search For Receipts > Summary - Receipt 389134

Receipt Create Date: 4/8/2020 11:50:39 AM
Source: Manual

Buttons: Delete, Save Updates, Complete

Exact Match: PO No. P1315377

Header Information

Receipt Name: 2020-04-08 brownb 02

Receipt No.	Receipt Date	Packing Slip No.	Supplier Name	Received by
To Be Assigned	4/8/2020 mm/dd/yyyy	1433455	Lenovo (United States) Inc	Bridget Brown

RECEIPT ADDRESS

Location: [Dropdown]
Attention: Bridget Brown
Phone: +1 (252) 328-1013
Email: brownb@ecu.edu
East Carolina University
One Card System
Greenville, NC 278584353
United States

CARRIER

Carrier: UPS
Tracking No.: 1Z2020356488987
Receipt Type: [Dropdown]
Attachments: Attach/Link
Notes: (1,000 Chars. Max)

Receipt Lines

Line Details

Show Receipt Details For Selected Lines: Remove Selected Items Go

PO No.	PO Line No.	Product Name	Catalog No.	Qty/UOM ordered	Previous Receipts	Quantity	Add to Inventory	Line Status	Actions
P1315377	1	ThinkPad T470s	20HFCTO1WW	1	389146	0		Received	[Dropdown] [Icon]
P1315377	2	3Y Depot/CCI upgrade from 1Y Depot/CCI	SWS0A14081	1	389146	1		Received	[Dropdown] [Icon]

Buttons: Delete, Save Updates, Complete

27. Click the **Complete** button.

Note: To continue completing receipts until all the items are received, repeat steps 17 – 27.

Accounts Payable > Receipts > Search For Receipts > Summary - Receipt 389134

Create Qty Receipt

Receipt No. 389134 has been created for the following PO No(s):

- PO/Reference No. P1315377

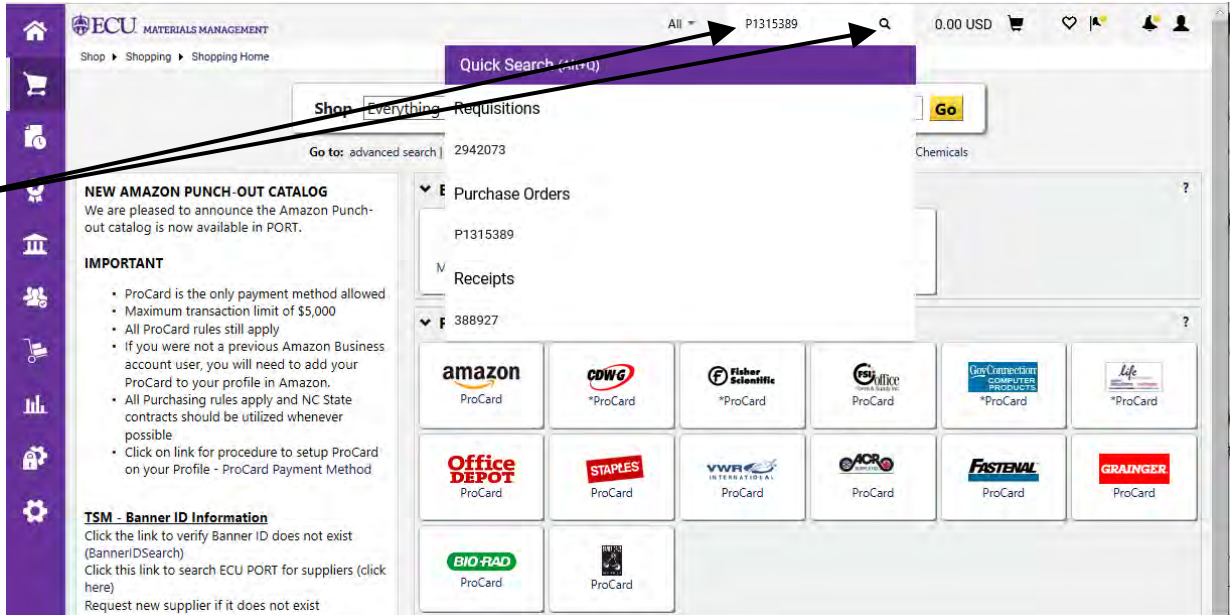
Buttons: ECU icon in sidebar

28. To print a copy of the receipt, repeat steps 13 – 15. This completes the steps for completing receiving for this PO. Click the **ECU** icon to go home.

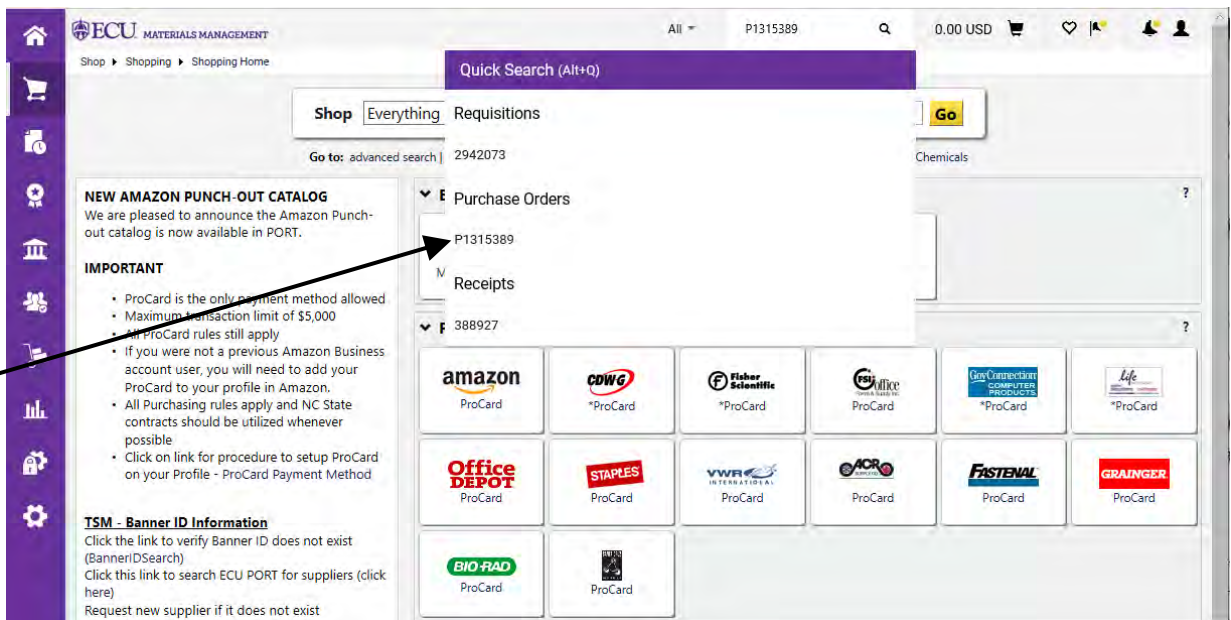
Important Note: Receipts are loaded to Banner in a batch process early the next morning. The Accounts Payable office will match your receipt with the invoice before making payments to the supplier.

RECEIPTS FOR PURCHASE ORDER

Last Updated on: 4/07/2020



1. Enter the PO # in the **Quick Search** popup menu and click on magnifying glass.



2. Click on **Purchase Order**.

RECEIPTS FOR PURCHASE ORDER

Last Updated on: 4/07/2020

ECU MATERIALS MANAGEMENT

Orders > Search > Purchase Orders > Summary - PO P1315389

PO/Reference No. **P1315389 Revision 0**

Supplier **Lenovo (United States) Inc**

Status **Purchase Order** Revisions PO Approvals Shipments Change Requests **Receipts** Invoices Comments Attachments (1) History

Summary Accounting Codes Taxes/S&H

General Information	Shipping Information	Billing/Payment
PO/Reference No. P1315389 Revision No. 0 Total 6,426.88 Purchase Order Date 4/7/2020 Supplier Name Lenovo (United States) Inc more info... Banner Supplier Number 800190274 Address Attn Les Murakeozy PO Box 13915 Research Triangle, NC 27709 US Requisition Number 2942073 view print	Ship To Attention: Bridget Brown Phone: +1 252-328-1013 Email: unknown@ecu.edu East Carolina University Social Work Ragsdale 104C Greenville, NC 278584353 United States Ship To Address Code ShipTo Address Code 075	Bill To East Carolina University Accounts Payable 120 Reade St. Fin. Srv. Bldg. ACCOUNTSPAYABLE@ecu.edu Greenville, NC 27858-4353 United States Billing Options Payment Terms 0% 2, Net 30

Contact Information
State Exempt None of the Above
Accounting Date no value
Accruals no value
Requestor Name Bridget Brown
Requestor Phone +1 252-328-1013
Requestor Email kornegaych@ecu.edu
Internal Attachments

3. Click on **Receipts** tab.

ECU MATERIALS MANAGEMENT

Orders > Search > Purchase Orders > Receipts - PO P1315389

PO/Reference No. **P1315389 Revision 0**

Supplier **Lenovo (United States) Inc**

Status Purchase Order Revisions PO Approvals Shipments Change Requests **Receipts** Invoices Comments Attachments (1) History

Receipts

Receipt No.	Receipt Date	Received by
388927	4/7/2020	Quantity Brown, Bridget

Receipt Line Details

No	Product Name	Catalog No.	Unit Price	Qty/UOM	Extended Price	Qty / Cost (In)	Qty / Cost (Out)	Status
1	Mid-Level Laptop - ThinkPad T490 CTO	20N3CTQ1WW	1,396.72 USD	4 EA	5,586.88 USD	2	2	Open Net Received
2	ThinkPad USB-C Dock Gen 2	40A50090US	165.00 USD	4 EA	660.00 USD	4	4	Open
3	Lenovo 65W Standard AC Adapter (USB Type-C) - US/Can/Mex	4X20M26268	45.00 USD	4 EA	180.00 USD	4	4	Open

4. The **Status** column indicates that the items were received.

5. To view the receipt, click on the **receipt number**. To see a printer friendly version, click on the **Quick View** icon. For this example, we will click on the **Quick View** icon.

RECEIPTS FOR PURCHASE ORDER

Last Updated on: 4/07/2020

Receipt Quick View

Header Information

Receipt Name: 2020-04-07 brownb 04
Complete Date: 4/7/2020 10:43:39 AM

Receipt No	Receipt Date	Packing Slip No.	Supplier Name	Received by
388927	4/7/2020		Lenovo (United States) Inc	Bridget Brown

RECEIPT ADDRESS: Location

DELIVERY: Carrier, Tracking No., Receipt Type, Attachments, Notes (1,000 Chars. Max)

Attention: Bridget Brown
Phone: +1 252-328-1013
Email: unknown@ecu.edu
East Carolina University
Social Work
Ragsdale
104C
Greenville, NC 278584353
United States

Line Details

PO No.	PO Line No.	Product Name	Catalog No.	Qty/UOM ordered	Previous Receipts	Quantity	Add to Inventory	Line Status	Actions
P1315389	1	Mid-Level Laptop - ThinkPad T490 CTO	20N3CTO1WW	4 EA Net Received 2 @ 1,396.72 (2,793.44)		2		Received	
P1315389	2	ThinkPad USB-C Dock Gen 2	40AS0090US	4 EA		0		Received	

Close

6. After reviewing and/or printing, close the **Quick View** overlay.

ECU MATERIALS MANAGEMENT

Search: Purchase Orders > Receipts - PO P1315389

1 of 1 Results

PO/Reference No. **P1315389 Revision 0**

Supplier **Lenovo (United States) Inc**

Available Actions: Add Comment Go

Status: Purchase Order Revisions PO Approvals Shipments Change Requests **Receipts** Invoices Comments Attachments (1) History

Receipts

Receipt No.	Receipt Date	Received by
388927	4/7/2020	Quantity

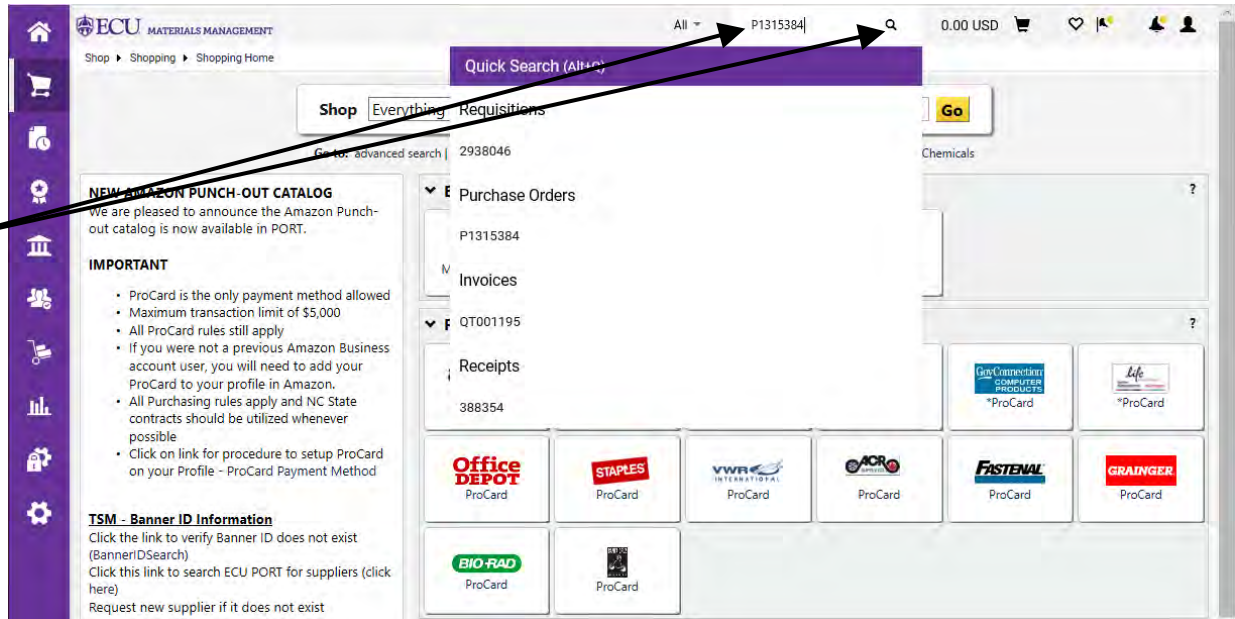
Receipt Line Details

No	Product Name	Catalog No.	Unit Price	Qty/UOM	Extended Price	Qty / Cost (In)	Qty / Cost (Out)	Status
1	Mid-Level Laptop - ThinkPad T490 CTO	20N3CTO1WW	1,396.72 USD	4 EA	5,586.88 USD	2	2	Open
2	ThinkPad USB-C Dock Gen 2	40AS0090US	165.00 USD	4 EA	660.00 USD	4		Net Received
3	Lenovo 65W Standard AC Adapter (USB Type-C) - US/Can/Mex	4X20M26268	45.00 USD	4 EA	180.00 USD	4		Open

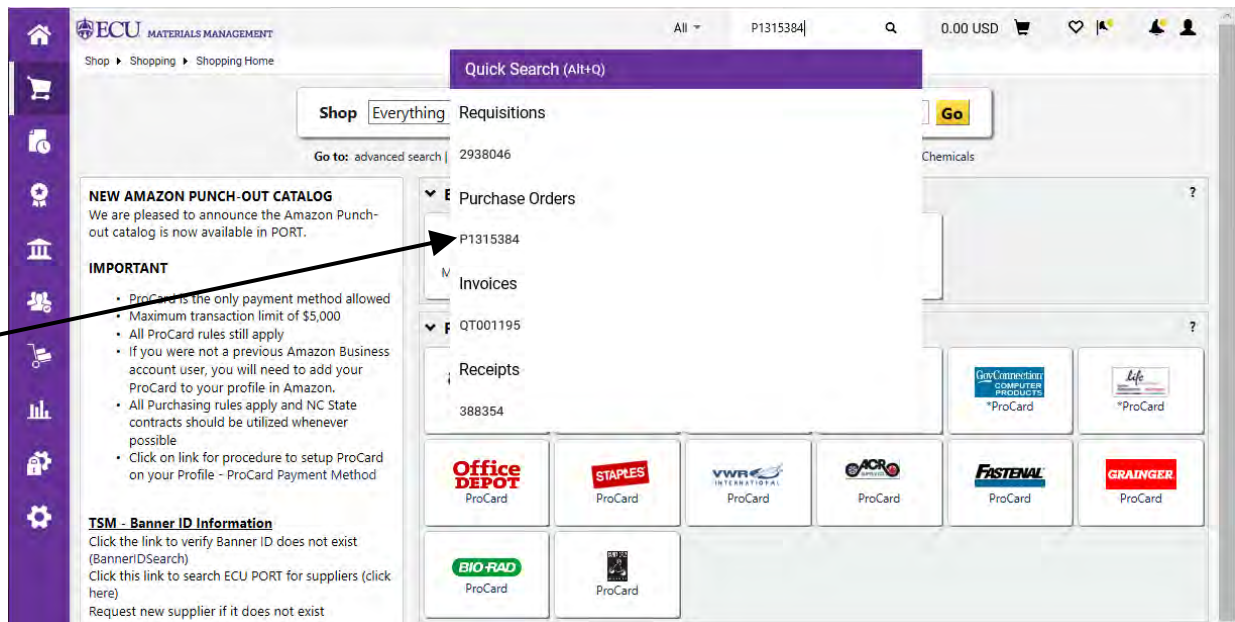
7. This completes the steps for this procedure. Click on **ECU** icon to return to the home page.

INVOICES FOR PURCHASE ORDER

Last Updated on: 4/07/2020



1. Enter a PO number in the **Quick Search** field and click on magnifying glass to initiate **Quick Search**.
Note: Invoices in PORT will only be for the following suppliers: Dell, Fisher, VWR, CDW-G, GovConnection, Life Technologies, Fastenal, Santa Cruz Biotech, and Henry Schein.



2. Click on the **Purchase Order** number.

INVOICES FOR PURCHASE ORDER

Last Updated on: 4/07/2020

ECU MATERIALS MANAGEMENT

Orders > Search > Purchase Orders > Summary - PO P1315384

PO/Reference No. **P1315384 Revision 0**

Supplier **Santa Cruz Biotech Inc**

Status: **Purchase Order** | Revisions | PO Approvals | Shipments | Change Requests | Receipts | **Invoices** | Comments | Attachments (1) | History

Summary | Accounting Codes | Taxes/S&H

General Information	Shipping Information	Billing/Payment
PO/Reference No. P1315384 Revision No. 0 Total 68.95 Purchase Order Date 4/2/2020 Supplier Name Santa Cruz Biotech Inc more info... Former Supplier Number B00180779 Address 10410 Finnell St, Dallas, TX 75220 US Requisition Number 2938046 view print	Ship To Attention: Lori Fontana-South Phone: +1 252-737-5377 Email: fontanasouth19@ecu.edu East Carolina University ITCS 209 Cotanche St Greenville, NC 278584353 United States Ship To Address Code ShipTo Address Code 023	Bill To East Carolina University Accounts Payable 120 Reade St. Fin. Srv. Bldg. ACCOUNTSPAYABLE@ecu.edu Greenville, NC 27858-4353 United States Billing Options Payment Terms 0% 2, Net 30

Contact Information
 State Exempt Health Care
 Accounting Date no value
 Accruals no value
 Requestor Name Lori Fontana-South
 Requestor Phone [+1 252-737-5377](tel:+1252-737-5377)
 Requestor Email fontanasouth19@ecu.edu
 Internal Attachments

Contract Information
 Contract no value
 Pricing Ref # no value
 Special Instructions None

Distribution Information | **Information for Supplier**

Powered by JAGGAER | Privacy Policy

3. Click on the **Invoices** tab.

ECU MATERIALS MANAGEMENT

Orders > Search > Purchase Orders > Invoices - PO P1315384

PO/Reference No. **P1315384 Revision 0**

Supplier **Santa Cruz Biotech Inc**

Status: Purchase Order | Revisions | PO Approvals | Shipments | Change Requests | Receipts | **Invoices** | Comments | Attachments (1) | History

Invoicing Summary

Invoice No.	Supplier Invoice No.	Invoice Date	Due Date	Invoice Type	Payment Status	Invoice Total	Invoiced By
QT001195		4/2/2020	5/2/2020	Invoice	Payable	68.95 USD	Fontana-South, Lori
						Total	68.95 USD

Line Details

Line No.	Product Name	Catalog No.	Unit Price	Qty/UOM	Extended Price	Invoice Qty/Cost	Status
1	UltraCruz® Gloves, Nitrile Plus, Large, 100/pack	sc-359597	7.00 USD	2 EA	14.00 USD	1 / 7.00 USD	Open
						1 / 7.00 USD	Net Invoiced
2	UltraCruz® Safety Glasses, blue lens, 12/case	sc-395799	33.00 USD	1 EA	33.00 USD	1 / 33.00 USD	Net Invoiced
3	UltraCruz® Antibacterial Lotion, 4 x 8 oz	sc-251867	15.00 USD	2 EA	30.00 USD	1 / 15.00 USD	Open
						1 / 15.00 USD	Net Invoiced
4	UltraCruz® Hand Sanitizing Gel, 6 x 3 oz	sc-520283	13.95 USD	1 EA	13.95 USD	1 / 13.95 USD	Net Invoiced

4. The **Status** column indicates which items have been invoiced and which are open.

5. To view the invoice, click on the invoice number. To see a printer friendly version, click on the **Quick View** icon. For this example, we will click on the **Quick View** icon.

INVOICES FOR PURCHASE ORDER

Last Updated on: 4/07/2020

Buyer Invoice Quick View

Invoice Summary - QT001195

Supplier Name: Santa Cruz Biotech Inc

General	Addresses	Note/Attachments
Invoice Type: Invoice Pay Status: Payable Invoice Number: QT001195 Supplier Invoice No.: Supplier Name: Santa Cruz Biotech Inc Invoice Date: 4/2/2020 Discount Date: 4/4/2020 Due Date: 5/2/2020 Terms: 0% 2, Net 30 Terms Discount: 0.00 USD Invoice Name: 2020-04-02 fontanasouth19 03 Invoiced By: Lori Fontana-South Match Status: Do Not Match Invoice Source: Manual Contains substituted item(s): <input checked="" type="checkbox"/>	Remit To Location: edit List: 2145 Delaware Ave Santa Cruz, CA 95068 United States Phone 1-800-4573801- Address Id AP Accounts Payable 1 Bill To: East Carolina University Accounts Payable 120 Reade St. Fin. Srv. Bldg. ACCOUNTSPAYABLE@ecu.edu Greenville, NC 27858-4353 United States	External Note: Business Purpose / Note to Approver: External Attachments: Internal Attachments:

Payment Information	Discount, Tax, Shipping & Handling
Accounting Date: 4/2/2020 F.O.B.: N/A Payment Method: Unknown Record No.: Record Date:	Discount, tax, shipping & handling Allocation Weighted Header-level Discount: 0.00 USD Tax 1: 0.00 USD Tax 2: 0.00 USD Shipping: 0.00 USD Handling: 0.00 USD

Print Close

Close

7.

6.

- You may need to scroll down the **Quick View** overlay to see all the information.
- After reviewing and/or printing, close the **Quick View** overlay.

ECU MATERIALS MANAGEMENT

PO/Reference No. **P1315384 Revision 0**
 Supplier **Santa Cruz Biotech Inc**

Available Actions: Add Comment Go

Status: Purchase Order Revisions PO Approvals Shipments Change Requests Receipts **Invoices** Comments Attachments (1) History

Invoice No.	Supplier Invoice No.	Invoice Date	Due Date	Invoice Type	Payment Status	Invoice Total	Invoiced By
QT001195		4/2/2020	5/2/2020	Invoice	Payable	68.95 USD	Fontana-South, Lori
						Total	68.95 USD

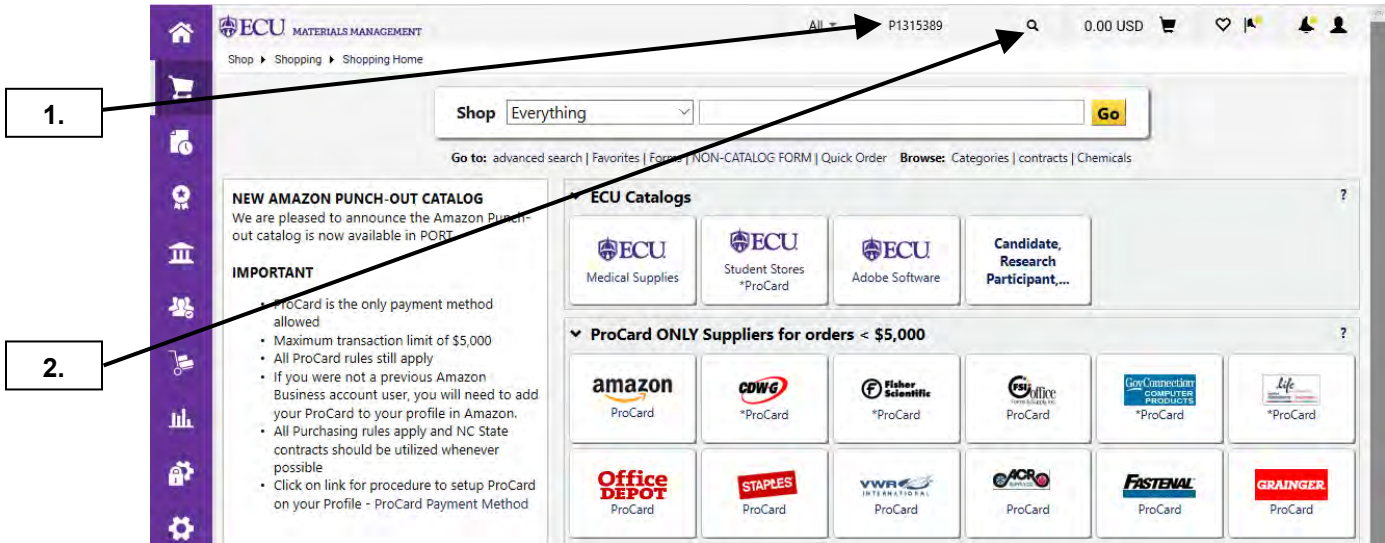
Line No.	Product Name	Catalog No.	Unit Price	Qty/UOM	Extended Price	Invoice Qty/Cost	Status
1	UltraCruz® Gloves, Nitrile Plus, Large, 100/pack	sc-359597	7.00 USD	2 EA	14.00 USD	1 / 7.00 USD	Open Net Invoiced
2	UltraCruz® Safety Glasses, blue lens, 12/case	sc-395799	33.00 USD	1 EA	33.00 USD	1 / 33.00 USD	Net Invoiced
3	UltraCruz® Antibacterial Lotion, 4 x 8 oz	sc-351867	15.00 USD	2 EA	30.00 USD	1 / 15.00 USD 1 / 15.00 USD	Open Net Invoiced
4	UltraCruz® Hand Sanitizing Gel, 6 x 3 oz	sc-520283	13.95 USD	1 EA	13.95 USD	1 / 13.95 USD	Net Invoiced

8.

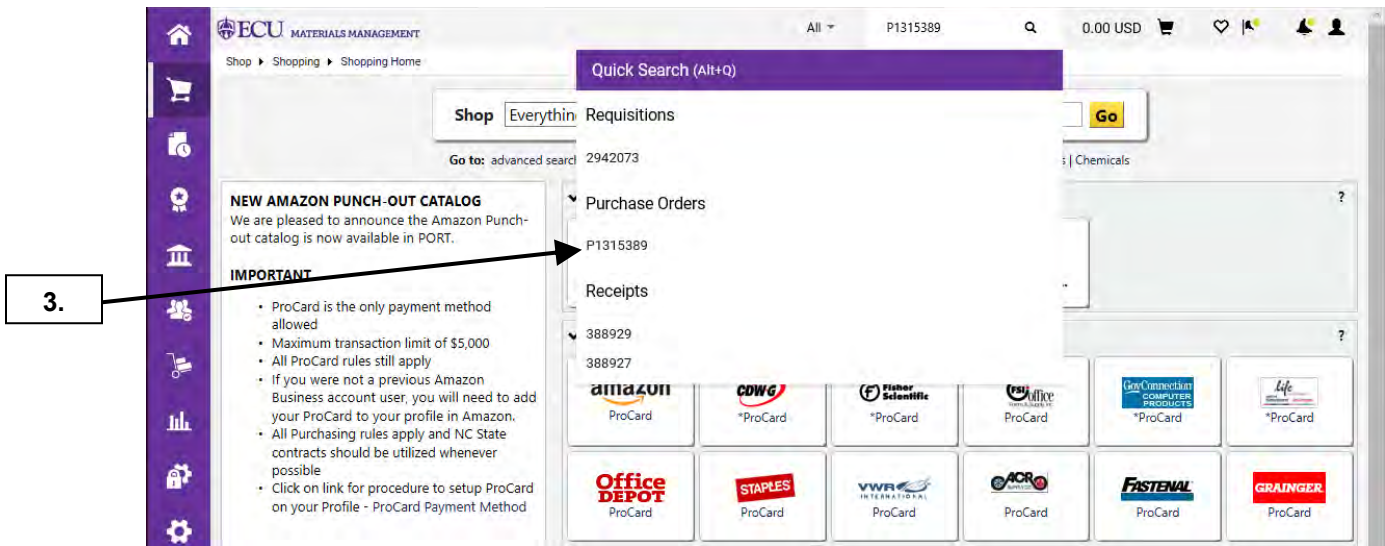
- This completes the steps for this procedure. Click on **ECU** icon to return to the home page.

RE-OPEN, DELETE, AND ADD COMMENTS TO RECEIPTS

Last Updated on: 4/07/2020



1. Enter PO number in the **Quick Search**. **Note:** This feature will allow you to open receipts the **SAME DAY** you created them to make changes or delete the receipt. **Once the receipt exports to Banner at 6am the following morning, no changes can be made to the receipt.**
2. Click on magnifying glass to launch the Quick Search fly-out menu.



3. Click on **Purchase Order**.

RE-OPEN, DELETE, AND ADD COMMENTS TO RECEIPTS

Last Updated on: 4/07/2020

Orders > Search > Purchase Orders > Status - PO P1315389

PO/Reference No. **P1315389 Revision 0** Available Actions: Add Comment

Supplier **Lenovo (United States) Inc**

Status Purchase Order Revisions PO Approvals Shipments **Receipts** Invoices Comments Attachments (1) History

General Information

PO/Reference No. **P1315389**

Revision No. 0

Supplier Name [Lenovo \(United States\) Inc](#) more info...

Purchase Order Date 4/7/2020

Total 6,426.88

Requisition Number 2942073 [view](#) | [print](#)

Requestor Name Bridget Brown

Requestor Email kornegaych@ecu.edu

Requestor Phone [+1 252-328-1013](tel:+12523281013)

Document Status

Workflow ✔ Completed (4/7/2020 10:00 AM)

Distribution The system distributed the purchase order using the method(s) indicated below the last time it was distributed:
Email (Plain Text): b2bttest@lenovo.com

Distribution Date/Time 4/7/2020 9:59 AM

Supplier Sent To Supplier [view](#)

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	Supplier	Receiving	Invoicing	Matching
1 ✔ Mid-Level Laptop - ThinkPad T490 CTO more info...	20N3CTO1WW	EA	1,396.72	4 EA	5,586.88 USD	Sent To Supplier	Fully Received	none	Do not Match
2 ✔ ThinkPad USB-C Dock Gen 2 more info...	40AS0090US	EA	165.00	4 EA	660.00 USD	Sent To Supplier	Fully Received	none	Do not Match
3 ✔ Lenovo 65W Standard AC Adapter (USB Type-C)- US/Can/Mex more info...	4X20M26268	EA	45.00	4 EA	180.00 USD	Sent To Supplier	Fully Received	none	Do not Match
Subtotal									6,426.88
Shipping									0.00
Handling									0.00
Total									6,426.88 USD

4. Click on **Receipts** tab.

Orders > Search > Purchase Orders > Receipts - PO P1315389

PO/Reference No. **P1315389 Revision 0** Available Actions: Add Comment

Supplier **Lenovo (United States) Inc**

Status Purchase Order Revisions PO Approvals Shipments Change Requests **Receipts** Invoices Comments Attachments (1) History

Receipts

Receipt No.	Receipt Date	Received by
388929	4/7/2020	Quantity Brown, Bridget
388927	4/7/2020	Quantity Brown, Bridget

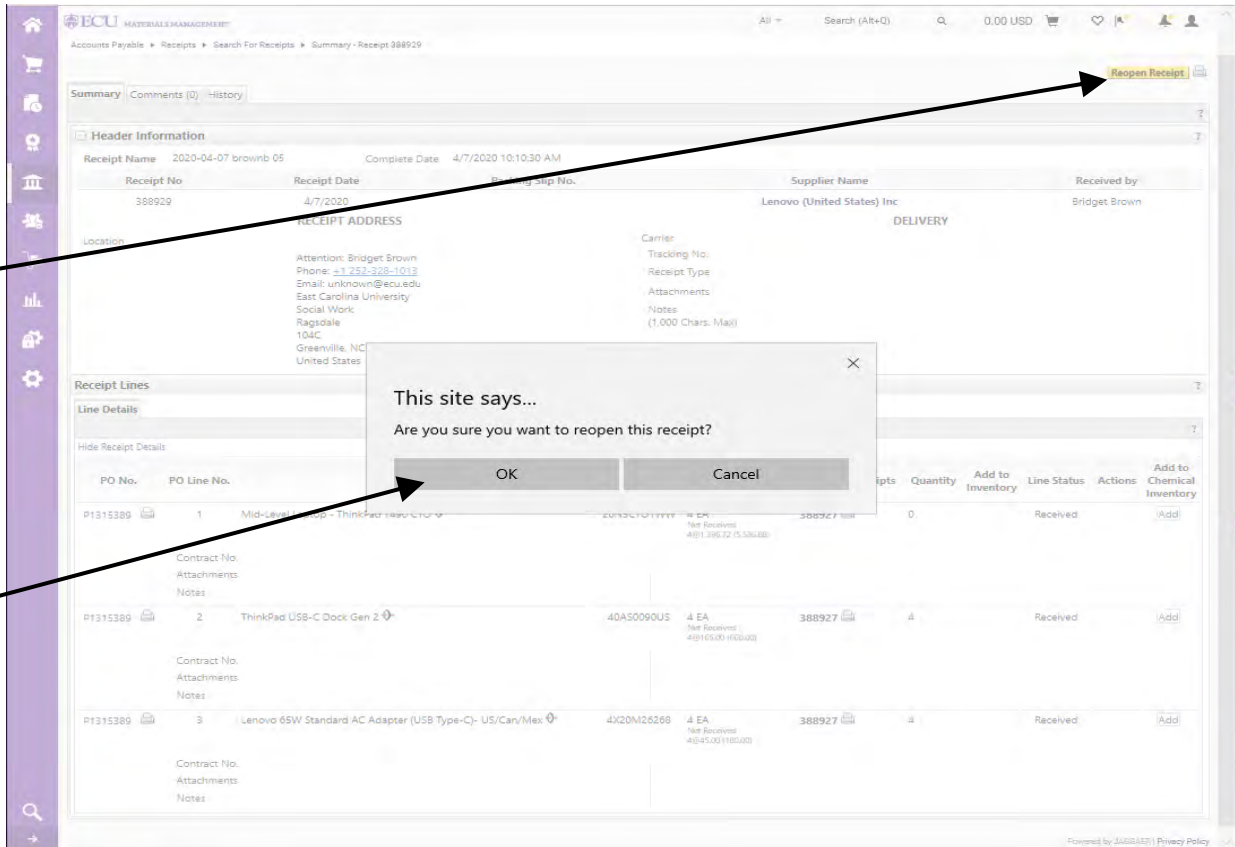
Receipt Line Details

No	Product Name	Catalog No.	Unit Price	Qty/UOM	Extended Price	Qty / Cost (In)	Qty / Cost (Out)	Status
1	Mid-Level Laptop - ThinkPad T490 CTO	20N3CTO1WW	1,396.72 USD	4 EA	5,586.88 USD	4		Net Received
2	ThinkPad USB-C Dock Gen 2	40AS0090US	165.00 USD	4 EA	660.00 USD	4		Net Received
3	Lenovo 65W Standard AC Adapter (USB Type-C)- US/Can/Mex	4X20M26268	45.00 USD	4 EA	180.00 USD	4		Net Received

5. Click on the **Receipt** to be modified. For the 1st example, make a modification to a receipt quantity.
Note: This action can only be accomplished the same day the receipt was created.

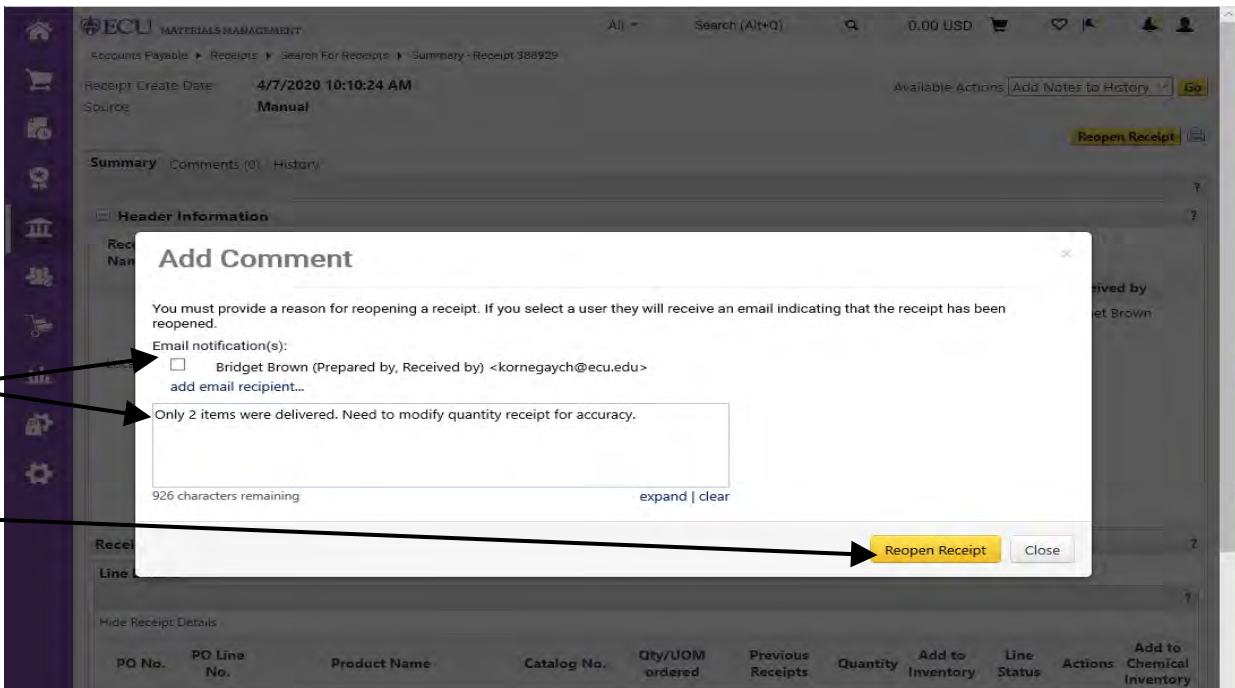
RE-OPEN, DELETE, AND ADD COMMENTS TO RECEIPTS

Last Updated on: 4/07/2020



6. Click the **Reopen Receipt** button.

7. A confirmation pop-up window will be displayed. Click **OK** to confirm that you want to reopen the receipt.



8. The **Reopen Receipt Reason** pop-up is displayed. From here you can select PORT Users to notify regarding the modification to the receipt. Enter the reason for the change to the receipt.

9. Click **Reopen Receipt** button.

RE-OPEN, DELETE, AND ADD COMMENTS TO RECEIPTS

Last Updated on: 4/07/2020

Accounts Payable > Receipts > Search For Receipts > Summary - Receipt 388927

Buttons: Delete, Save Updates, Complete

Summary | Comments (0) | History

Header Information

Receipt Name: 2020-04-07 brownb 04

Receipt No	Receipt Date	Packing Slip No.	Supplier Name	Received by
388927	4/7/2020		Lenovo (United States) Inc	Bridget Brown

mm/dd/yyyy

RECEIPT ADDRESS

Location: [Dropdown]

Attention: Bridget Brown
Phone: +1 252-328-1013
Email: unknown@ecu.edu
East Carolina University
Social Work
Ragsdale
104C
Greenville, NC 278584353
United States

DELIVERY

Carrier: Other [Dropdown]

Tracking No.: [Text Box]

Receipt Type: [Dropdown]

Attachments: [Text Box]

Notes: (1,000 Chars. Max) [Text Box]

Receipt Lines

Line Details

Hide Receipt Details For Selected Lines: Remove Selected Items [Go]

PO No.	PO Line No.	Product Name	Catalog No.	Qty/USM ordered	Previous Receipts	Quantity	Add to Inventory	Line Status	Actions
P1315389	1	Mid-Level Laptop - ThinkPad T490 CTO	20N3CTO1WW	4 EA	388929	2	[Text Box]	Received	[Dropdown]
P1315389	2	ThinkPad USB-C Dock Gen 2	40AS0090US	4 EA	388929	0	[Text Box]	Received	[Dropdown]

10. Update quantity received for desired line item.

11. Click on **Complete** button. This completes modification of an existing receipt on the same day.

Accounts Payable > Receipts > Search For Receipts > Summary - Receipt 388927

Buttons: Create Qty Receipt

Receipt No . 388927 has been created for the following PO No(s):

- PO/Reference No. P1315389

12. Click the **PO #**.

RE-OPEN, DELETE, AND ADD COMMENTS TO RECEIPTS

Last Updated on: 4/07/2020

ECU MATERIALS MANAGEMENT | All | Search (Alt+Q) | 0.00 USD

Orders > Search > Purchase Orders > Status - PO P1315389

PO/Reference No. **P1315389 Revision 0** | Available Actions: Add Comment | Go

Supplier: **Lenovo (United States) Inc**

Status: Purchase Order | Revisions | PO Approvals | Shipments | Change Requests | **Receipts** | Invoices | Comments | Attachments (1) | History

General Information

PO/Reference No. **P1315389**

Revision No. 0

Supplier Name **Lenovo (United States) Inc** [more info...](#)

Purchase Order Date 4/7/2020

Total 6,426.88

Requisition Number 2942073 [view](#) | [print](#)

Requestor Name **Bridget Brown**

Requestor Email **kornegaych@ecu.edu**

Requestor Phone **+1 252-328-1013**

Document Status

Workflow ✓ **Completed**
(4/7/2020 10:00 AM)

Distribution The system distributed the purchase order using the method(s) indicated below the last time it was distributed: [view](#)
Email (Plain Text): **b2bttest@lenovo.com**

Distribution Date/Time 4/7/2020 9:59 AM

Supplier Sent To Supplier [view](#)

Line Item Status											
Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	Supplier	Receiving	Invoicing	Matching		
1 ✓ Mid-Level Laptop - ThinkPad T490 CTO more info...	20N3CTO1WW	EA	1,396.72	4 EA	5,586.88 USD	Sent To Supplier	Partially Received	none	Do not Match		
2 ✓ ThinkPad USB-C Dock Gen 2 more info...	40AS0090US	EA	165.00	4 EA	660.00 USD	Sent To Supplier	Fully Received	none	Do not Match		
3 ✓ Lenovo 65W Standard AC Adapter (USB Type-C)-US/Can/Mex more info...	4X20M26268	EA	45.00	4 EA	180.00 USD	Sent To Supplier	Fully Received	none	Do not Match		
									Subtotal	6,426.88	
									Shipping	0.00	
									Handling	0.00	
									Total	6,426.88 USD	

13. Click on **Receipts** tab. For 2nd example, we will delete an existing receipt.
Note: This action can only be accomplished the same day the receipt was created.

ECU MATERIALS MANAGEMENT | All | Search (Alt+Q) | 0.00 USD

Orders > Search > Purchase Orders > Receipts - PO P1315389

PO/Reference No. **P1315389 Revision 0** | Available Actions: Add Comment | Go

Supplier: **Lenovo (United States) Inc**

Status: Purchase Order | Revisions | PO Approvals | Shipments | Change Requests | **Receipts** | Invoices | Comments | Attachments (1) | History

Receipts

Receipt No.	Receipt Date	Received by
388929	4/7/2020	Quantity Brown, Bridget
388927	4/7/2020	Quantity Brown, Bridget

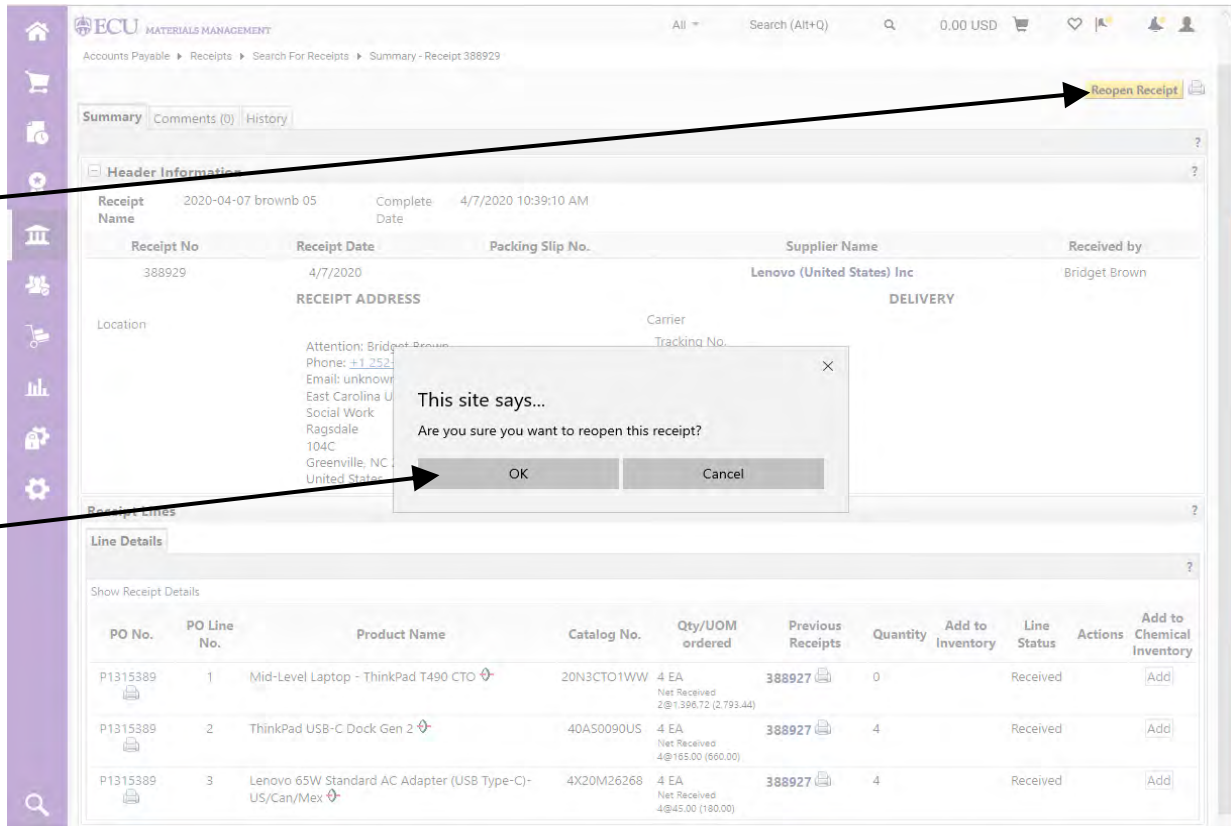
Receipt Line Details

No	Product Name	Catalog No.	Unit Price	Qty/UOM	Extended Price	Qty / Cost (In)	Qty / Cost (Out)	Status
1	Mid-Level Laptop - ThinkPad T490 CTO	20N3CTO1WW	1,396.72 USD	4 EA	5,586.88 USD	2	2	Open Net Received
2	ThinkPad USB-C Dock Gen 2	40AS0090US	165.00 USD	4 EA	660.00 USD	4	4	Net Received
3	Lenovo 65W Standard AC Adapter (USB Type-C)- US/Can/Mex	4X20M26268	45.00 USD	4 EA	180.00 USD	4	4	Net Received

14. Note that previous modification to receipt 388927, was accepted and now shows a quantity of 2 Net Received for Line item 1 with a quantity of 2 remaining Open.
 15. Click on receipt that you want to delete.

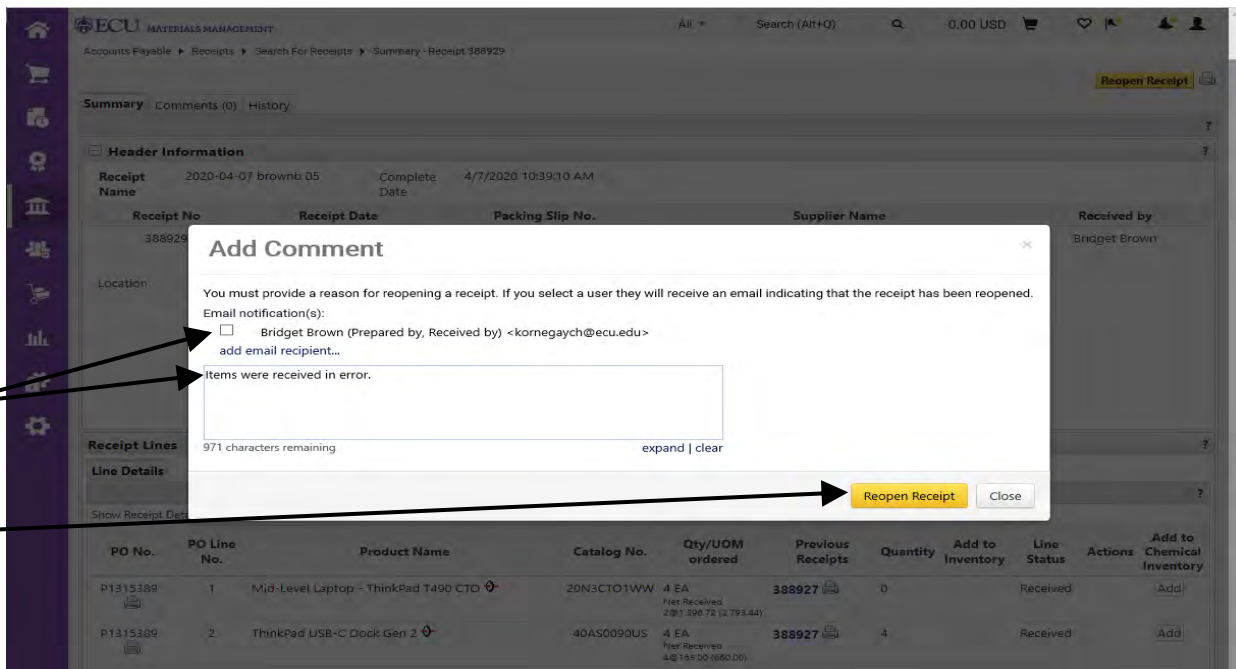
RE-OPEN, DELETE, AND ADD COMMENTS TO RECEIPTS

Last Updated on: 4/07/2020



16. Click on **Reopen Receipt** button.

17. A confirmation pop-up window will be displayed. Click **OK** to confirm that you want to reopen the receipt.

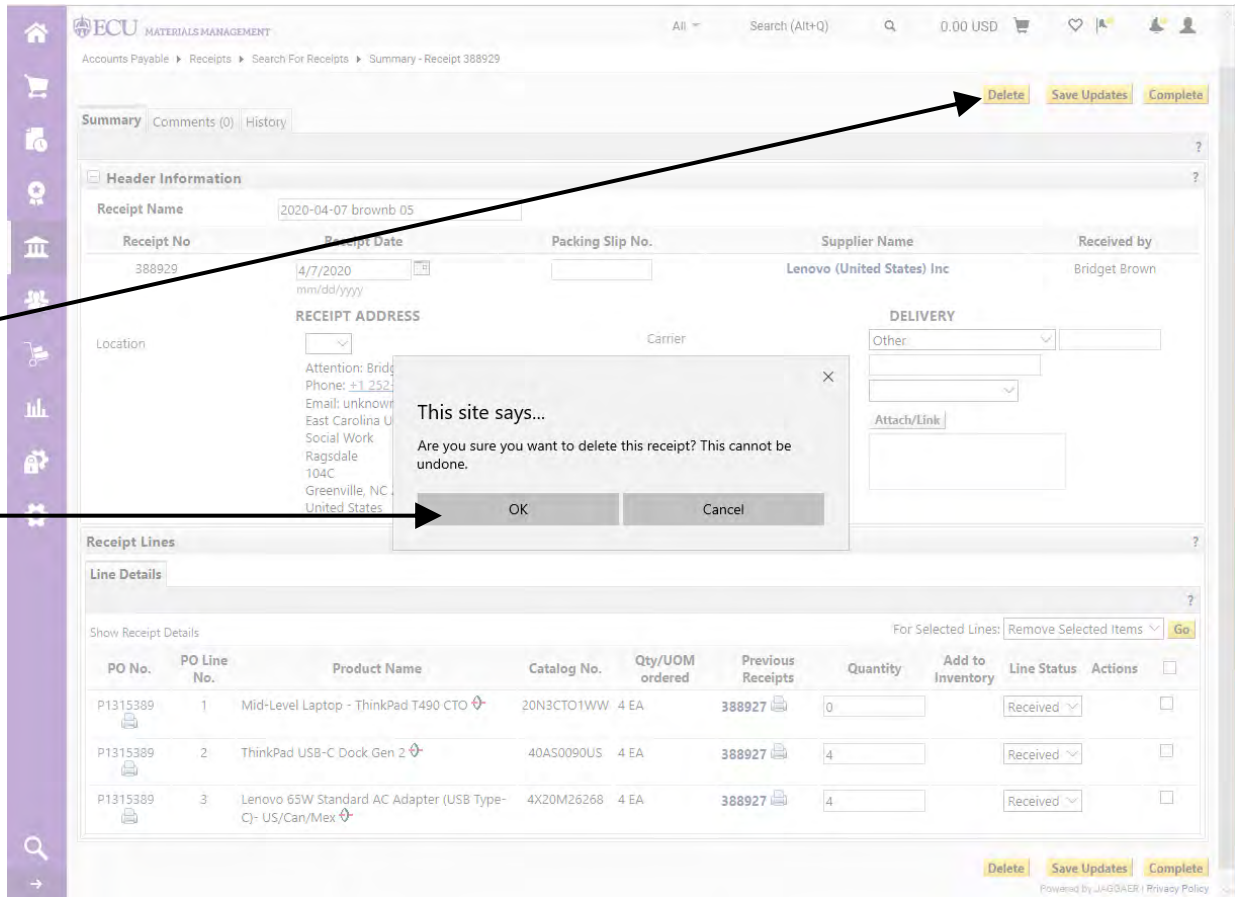


18. Provide the reason to reopen receipt by adding a comment in the **Add Comment** window. From here you can select PORT Users to notify regarding deletion of the receipt.

19. Click **Reopen Receipt** button.

RE-OPEN, DELETE, AND ADD COMMENTS TO RECEIPTS

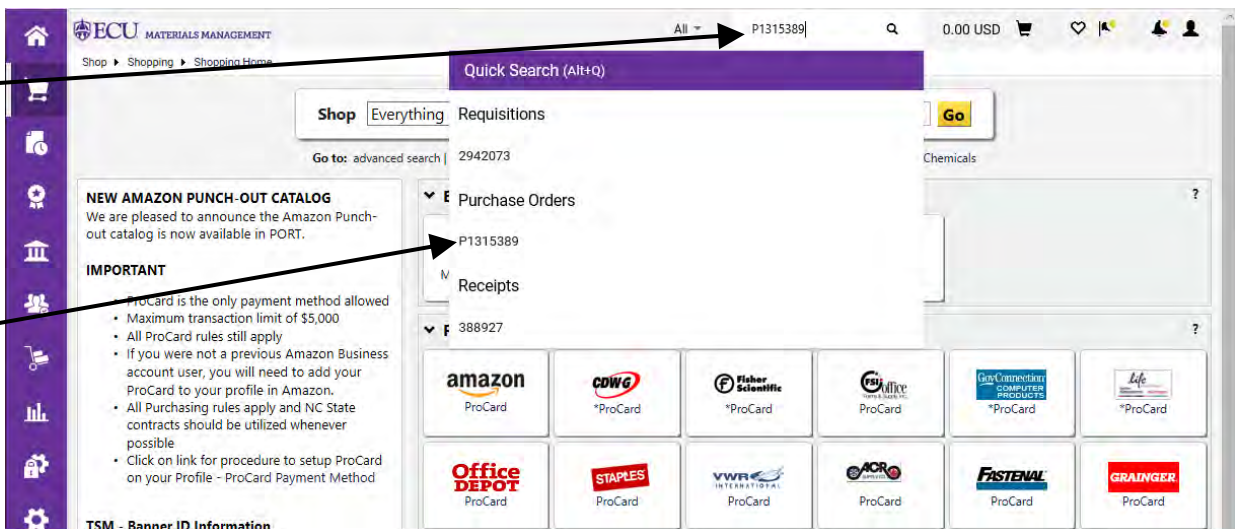
Last Updated on: 4/07/2020



20. Click on **Delete** button.

Note: Once it has been deleted, the receipt cannot be recovered.

21. A confirmation pop-up window will be displayed. Click **OK** to confirm that you want to delete the receipt.



22. This has deleted the reopened receipt.

23. To confirm, enter the **PO #** for **Quick Search**, Notice the demo receipt 388929 is no longer listed.

24. Select **Purchase Order Number**.

RE-OPEN, DELETE, AND ADD COMMENTS TO RECEIPTS

Last Updated on: 4/07/2020

ECU MATERIALS MANAGEMENT | All | Search (Alt+Q) | 0.00 USD

Orders > Search > Purchase Orders > Summary - PO P1315389

< Back to Results | 1 of 1 Results

PO/Reference No. **P1315389 Revision 0** | Available Actions: Add Comment | Go

Supplier **Lenovo (United States) Inc**

Status: **Purchase Order** | Revisions | PO Approvals | Shipments | Change Requests | **Receipts** | Invoices | Comments | Attachments (1) | History

Summary | Accounting Codes | Taxes/S&H

General Information	Shipping Information	Billing/Payment
PO/Reference No. P1315389 Revision No. 0 Total 6,426.88 Purchase Order Date 4/7/2020 Supplier Name Lenovo (United States) Inc Banner Supplier Number B00190274 Address Attn Les Murakeozy, PO Box 13915, Research Triangle, NC 27709 US Requisition Number 2942073	Ship To Attention: Bridget Brown Phone: +1 252-328-1013 Email: unknown@ecu.edu East Carolina University Social Work Ragsdale 104C Greenville, NC 278584353 United States Ship To Address Code ShipTo Address Code 075 Delivery Options Ship Via Best Carrier-Best Way F.O.B. N/A Requested Delivery Date no value	Bill To East Carolina University Accounts Payable 120 Reade St. Fin. Srv. Bldg. ACCOUNTSPAYABLE@ecu.edu Greenville, NC 27858-4353 United States Billing Options Payment Terms 0% 2, Net 30

Contact Information
 State Exempt None of the Above
 Accounting Date no value
 Accruals no value
 Requestor Name Bridget Brown
 Requestor Phone +1 252-328-1013
 Requestor Email kornegaych@ecu.edu

25. Click on the **Receipts** tab.

ECU MATERIALS MANAGEMENT | All | Search (Alt+Q) | 0.00 USD

Orders > Search > Purchase Orders > Receipts - PO P1315389

< Back to Results | 1 of 1 Results

PO/Reference No. **P1315389 Revision 0** | Available Actions: Add Comment | Go

Supplier **Lenovo (United States) Inc**

Status: Purchase Order | Revisions | PO Approvals | Shipments | Change Requests | **Receipts** | Invoices | Comments | Attachments (1) | History

Receipts

Receipt No.	Receipt Date	Received by
388927	4/7/2020	Quantity
		Brown, Bridget

Receipt Line Details

No	Product Name	Catalog No.	Unit Price	Qty/UOM	Extended Price	Qty / Cost (In)	Qty / Cost (Out)	Status
1	Mid-Level Laptop - ThinkPad T490 CTO	20N3CTO1WW	1,396.72 USD	4 EA	5,586.88 USD	2	2	Open
2	ThinkPad USB-C Dock Gen 2	40AS0090US	165.00 USD	4 EA	660.00 USD	4	4	Net Received
3	Lenovo 65W Standard AC Adapter (USB Type-C)- US/Can/Mex	4X20M26268	45.00 USD	4 EA	180.00 USD	4	4	Open

26. Notice that there is only 1 receipt remaining and that 388929 has been deleted. Click on receipt to add a comment.

RE-OPEN, DELETE, AND ADD COMMENTS TO RECEIPTS

Last Updated on: 4/07/2020

Accounts Payable > Receipts > Search For Receipts > Summary - Receipt 388927

Summary **Comments (0)** History

Header Information

Receipt Name: 2020-04-07 brownb 04 Complete Date: 4/7/2020 10:43:39 AM

Receipt No	Receipt Date	Packing Slip No.	Supplier Name	Received by
388927	4/7/2020		Lenovo (United States) Inc	Bridget Brown

RECEIPT ADDRESS

Location: Attention: Bridget Brown
Phone: +1 252-328-1013
Email: unknown@ecu.edu
East Carolina University
Social Work
Ragsdale
104C
Greenville, NC 278584353
United States

Carrier: Tracking No., Receipt Type, Attachments, Notes (1,000 Chars. Max)

Receipt Lines

Line Details

Show Receipt Details

PO No.	PO Line No.	Product Name	Catalog No.	Qty/UOM ordered	Previous Receipts	Quantity	Add to Inventory	Line Status	Actions	Add to Chemical Inventory
P1315389	1	Mid-Level Laptop - ThinkPad T490 CTO	20N3CT01WW	4 EA Net Received 2@11,396.72 (2,793.44)		2		Received		Add
P1315389	2	ThinkPad USB-C Dock Gen 2	40A50090US	4 EA		0		Received		Add
P1315389	3	Lenovo 65W Standard AC Adapter (USB Type-C)-US/Can/Mex	4X20M26268	4 EA		0		Received		Add

27. Click **Comments** tab.

Accounts Payable > Receipts > Search For Receipts > Comments - Receipt 388927

Receipt Create Date: 4/7/2020 10:09:33 AM Available Actions: Add Notes to History [Go](#)

Source: Manual

Summary **Comments (0)** History

Add Comment

Show comments for: Receipt

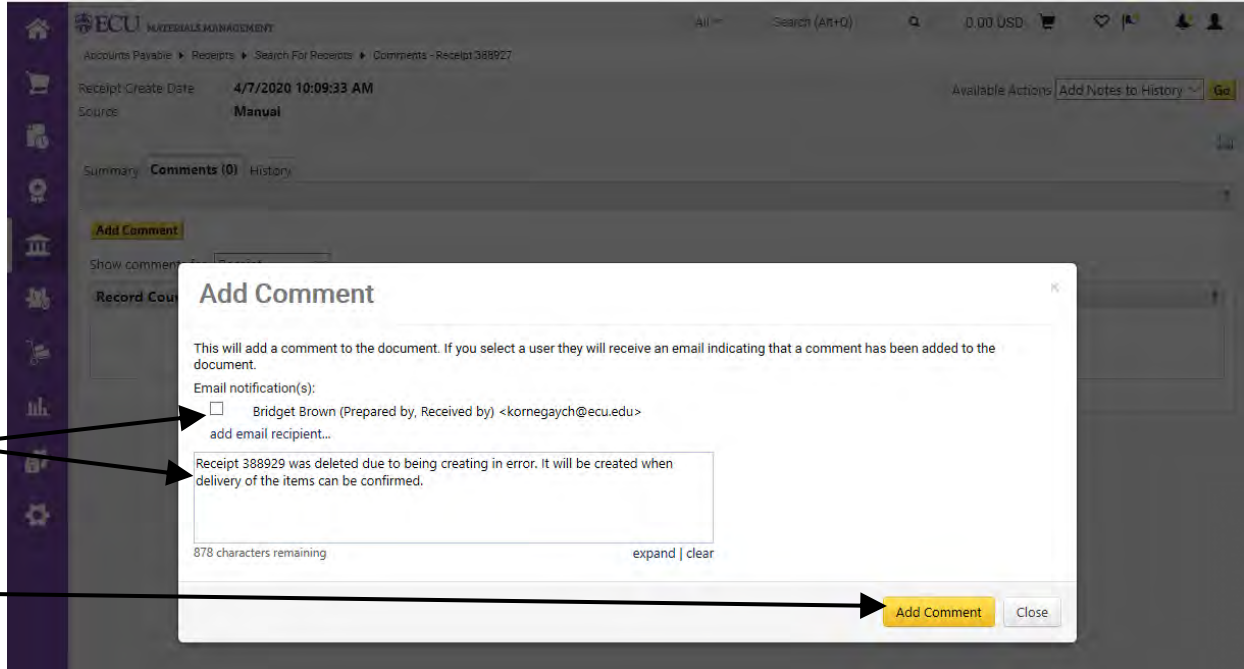
Record Count 0

No comments have been added

28. Click on **Add Comment** button.

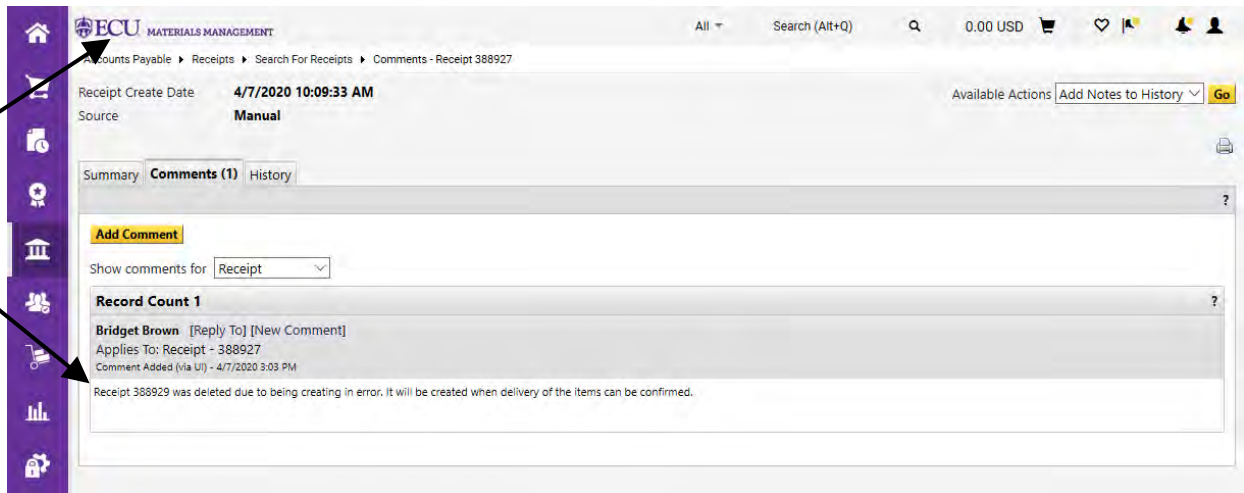
RE-OPEN, DELETE, AND ADD COMMENTS TO RECEIPTS

Last Updated on: 4/07/2020



29. The **Add Comment** pop-up is displayed. From here you can select PORT Users to notify regarding the comment on the receipt. Enter a comment for the receipt.

30. Click the **Add Comment** button.



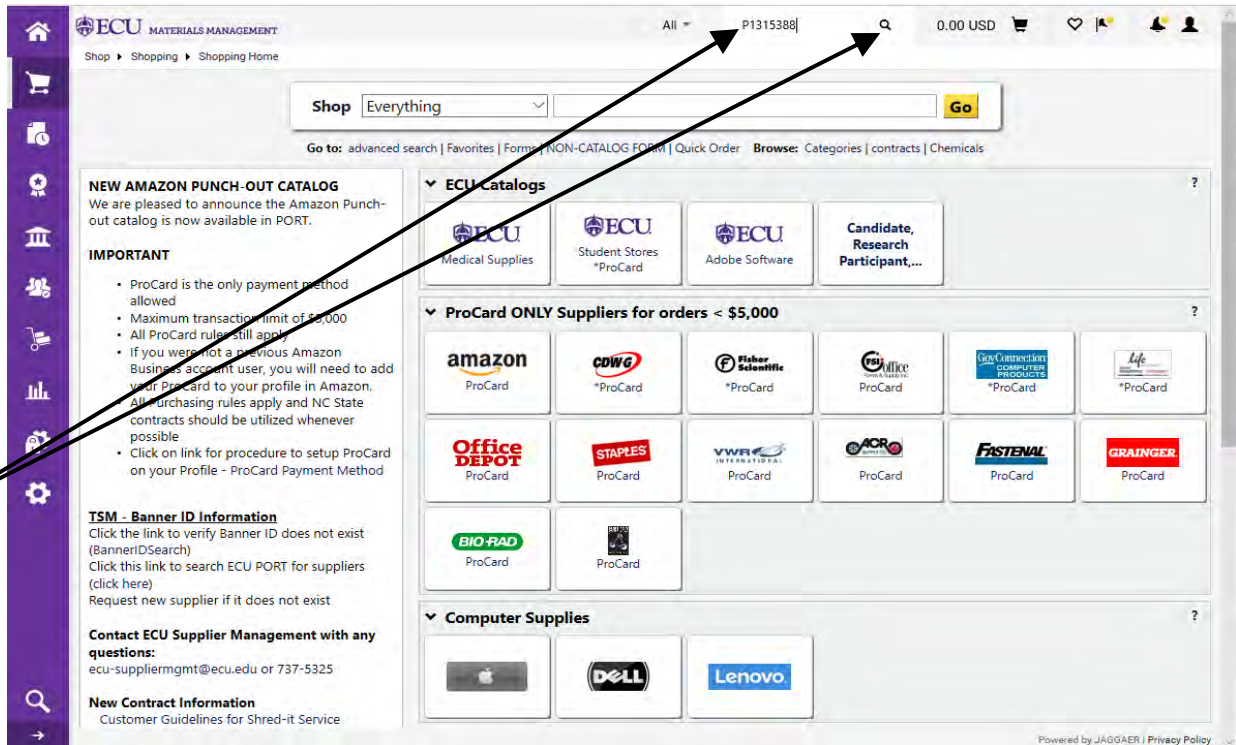
31. The comment has been added to the receipt.

32. This completes steps for this procedure. Click on **ECU** icon to return to home page.

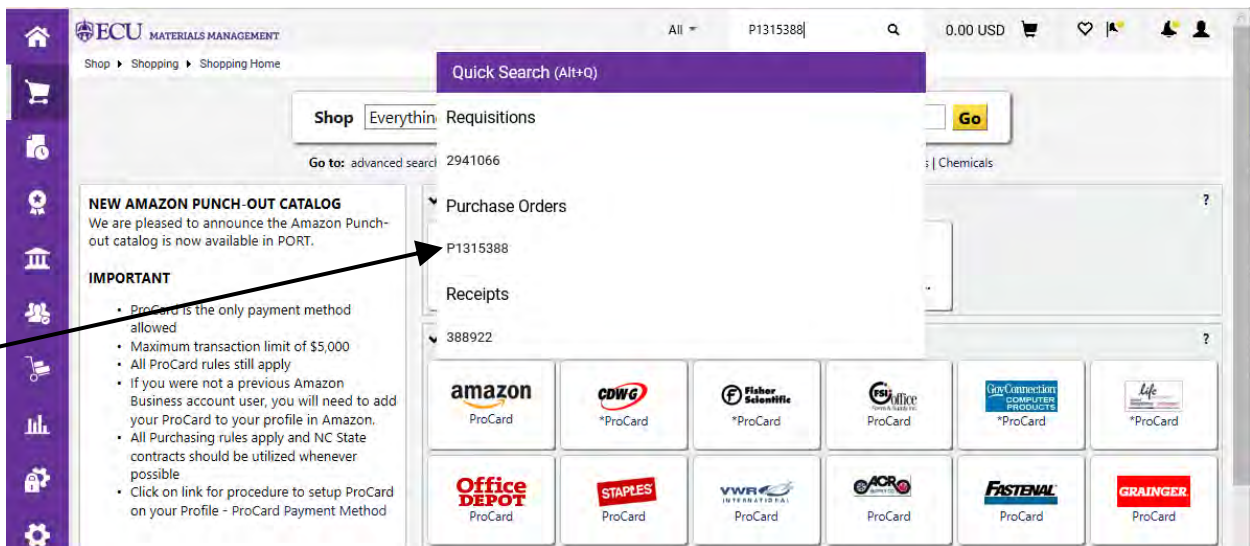
Important Note: Receipts are loaded to Banner in a batch process early the next morning. The Accounts Payable office will match your receipt with an Invoice before making payments to the supplier.

RETURN PROCESS

Last Updated on: 4/07/2020



1. Enter the PO number and click on magnifying glass to retrieve the order.
IMPORTANT NOTES: 1st Call the supplier to initiate the return and record the **RMA** (Return Material Authorization) number. 2nd Do not mix returns with receiving. Receive **ALL ITEM** quantities that **WERE DELIVERED**. Then complete an additional receipt for the items that will be returned for credit memo or replacement.



2. Click on the PO # within the **Quick Search** fly-out menu.

RETURN PROCESS

Last Updated on: 4/07/2020

ECU MATERIALS MANAGEMENT

Orders > Search > Purchase Orders > Status - PO P1315388

PO/Reference No. **P1315388 Revision 0**

Supplier **Dell Marketing LP**

Status Purchase Order Revisions PO Approvals Shipments **Receipts** Invoices Comments Attachments (1) History

General Information

PO/Reference No. **P1315388**

Revision No. **0**

Supplier Name **Dell Marketing LP** more info...

Purchase Order Date **4/6/2020**

Total **12,521.00**

Requisition Number **2941066** view | print

Requestor Name **Charles Boulineau**

Requestor Email **boulineauc@ecu.edu**

Requestor Phone **+1 919-328-1924**

Document Status

Workflow **Completed** (4/6/2020 5:12 PM)

Distribution The system distributed the purchase order using the method(s) indicated below the last time it was distributed. view

Fax: +1 866-501-8285

Manual

Distribution Date/Time **4/6/2020 5:11 PM**

Supplier **Sent To Supplier** view

Line Item Status

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	Supplier	Receiving	Invoicing	Matching
1 ✓ Dell Optiplex 5040 more info...	4365435454	EA	1,025.00	7 EA	7,175.00 USD	Sent To Supplier	Fully Received	none	Do not Match
2 ✓ Dell Latitude 6540 more info...	7698769547567	EA	1,250.00	3 EA	3,750.00 USD	Sent To Supplier	Fully Received	none	Do not Match
3 ✓ Dell Color LaserJet Printer D545 more info...	34565467547	EA	399.00	4 EA	1,596.00 USD	Sent To Supplier	Fully Received	none	Do not Match
Subtotal								12,521.00	
Shipping								0.00	
Handling								0.00	
Total								12,521.00 USD	

3. Click on **Receipts** tab.

ECU MATERIALS MANAGEMENT

Orders > Search > Purchase Orders > Receipts - PO P1315388

PO/Reference No. **P1315388 Revision 0**

Supplier **Dell Marketing LP**

Status Purchase Order Revisions PO Approvals Shipments Change Requests **Receipts** Invoices Comments Attachments (1) History

Receipts

Receipt No.	Receipt Date	Received by
388922	4/7/2020	Quantity
		Brown, Bridget

Receipt Line Details

No	Product Name	Catalog No.	Unit Price	Qty/UOM	Extended Price	Qty / Cost (In)	Qty / Cost (Out)	Status
1	Dell Optiplex 5040	4365435454	1,025.00 USD	7 EA	7,175.00 USD	7		Net Received
2	Dell Latitude 6540	7698769547567	1,250.00 USD	3 EA	3,750.00 USD	3		Net Received
3	Dell Color LaserJet Printer D545	34565467547	399.00 USD	4 EA	1,596.00 USD	4		Net Received

4. Click on **Available Actions** dropdown box and select **Create Quantity Receipt**.
5. Click on the **Go** button.

RETURN PROCESS

Last Updated on: 4/07/2020

ECU MATERIALS MANAGEMENT

Accounts Payable > Receipts > Search For Receipts > Summary - Receipt 388925

Receipt Create Date: 4/7/2020 8:19:44 AM
Source: Manual

Summary | Comments (0) | History

Exact Match: PO No. P1315388

Header Information

Receipt Name: 2020-04-07 brownb 02

Receipt No	Receipt Date	Packing Slip No.	Supplier Name	Received by
To Be Assigned	4/7/2020 mm/dd/yyyy		Dell Marketing LP	Bridget Brown

RECEIPT ADDRESS

Location: [Dropdown]

Contact Name: Chuck Boulineau
Phone: +1 (919) 328-1924
Email: none@ecu.edu
East Carolina University
Admin & Finance
115 Heart Dr
ECHI
Rm 447
Greenville, NC 27834
United States

CARRIER

Carrier: [Dropdown]
Tracking No.: [Text]
Receipt Type: [Dropdown]
Attachments: [Text]
Notes: (1,000 Chars. Max)

DELIVERY

Other: [Dropdown]

Attach/Link: [Text]

Receipt Lines

Line Details

Show Receipt Details

PO No.	PO Line No.	Product Name	Catalog No.	Qty/UOM ordered	Previous Receipts	Quantity	Add to Inventory	Line Status	Actions
P1315388	1	Dell Optiplex 5040	4365435454	7	388922	0	[Dropdown]	Received	[Dropdown]
P1315388	2	Dell Latitude 6540	7698769547567	3	388922	0	[Dropdown]	Received	[Dropdown]
P1315388	3	Dell Color LaserJet Printer D545	34565467547	4	388922	0	[Dropdown]	Received	[Dropdown]

For Selected Lines: Remove Selected Items [Go]

6. Check the items not being returned on your request, to remove them from the receipt.
7. Click **Go** button to remove selected items.

ECU MATERIALS MANAGEMENT

Accounts Payable > Receipts > Search For Receipts > Summary - Receipt 388925

Receipt Create Date: 4/7/2020 8:19:44 AM
Source: Manual

Summary | Comments (0) | History

Exact Match: PO No. P1315388

Header Information

Receipt Name: 2020-04-07 brownb 02

Receipt No	Receipt Date	Packing Slip No.	Supplier Name	Received by
To Be Assigned	4/7/20 mm/dd/yyyy		Dell Marketing LP	Bridget Brown

RECEIPT ADDRESS

Location: [Dropdown]

Contact Name: Chuck Boulineau
Phone: +1 (919) 328-1924
Email: none@ecu.edu
East Carolina University
Admin & Finance
115 Heart Dr
ECHI
Rm 447
Greenville, NC 27834
United States

CARRIER

Carrier: [Dropdown]
Tracking No.: [Text]
Receipt Type: [Dropdown]
Attachments: [Text]
Notes: (1,000 Chars. Max)

DELIVERY

Other: [Dropdown]

Attach/Link: [Text]

Receipt Lines

Line Details

Show Receipt Details

PO No.	PO Line No.	Product Name	Catalog No.	Qty/UOM ordered	Previous Receipts	Quantity	Add to Inventory	Line Status	Actions
P1315388	1	Dell Optiplex 5040	4365435454	7	388922	2	[Dropdown]	Returned	[Dropdown]

For Selected Lines: Remove Selected Items [Go]

8. Enter the quantity of item(s) being returned and set **Line Status** to **Returned**.
9. Click **Save Updates** button.

RETURN PROCESS

Last Updated on: 4/07/2020

10. Enter reason for return in **Notes** section.
 - i) **Adjustment** – Original quantity of item will be increasing or decreasing
 - ii) **Damaged** – Item is damaged and will be replaced
 - iii) **Not Ordered** – Invoiced and sent additional item not ordered
 - iv) **Over Shipment** – Sent more items than ordered
 - v) **Replaced / Substitute** – Original item ordered on PO is being replaced by a different item
11. Select **Returned For** option. Either **Returned for Credit Memo** or **Return for Replacement**.
12. Enter the **RMA No.** provided by supplier.
13. Click on **Complete** button.

14. The **Receipt Number** and link is displayed for your return.
15. Click on the **PO Number** to add a comment about the returned item(s).

RETURN PROCESS

Last Updated on: 4/07/2020

ECU MATERIALS MANAGEMENT

Orders > Search > Purchase Orders > Status - PO P1315388

PO/Reference No. **P1315388 Revision 0** Available Actions

Supplier **Dell Marketing LP**

Status Purchase Order Revisions PO Approvals Shipments Change Requests Receipts **Invoices** Comments Attachments (1) History

General Information

PO/Reference No. **P1315388**
Revision No. **0**
Supplier Name **Dell Marketing LP** more info...
Purchase Order Date **4/6/2020**
Total **12,521.00**
Requisition Number **2941066** view | print
Requestor Name **Charles Boulineau**
Requestor Email **boulineauc@ecu.edu**
Requestor Phone **+1 919-328-1924**

Document Status

Workflow **Completed** (4/6/2020 5:12 PM)
Distribution The system distributed the purchase order using the method(s) indicated below the last time it was distributed:
Fax: +1 866-501-8285
Manual
Distribution Date/Time **4/6/2020 5:11 PM**
Supplier **Sent To Supplier** view

Line Item Status

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	Supplier	Receiving	Invoicing	Matching
1 <input checked="" type="checkbox"/> Dell Optiplex 5040 more info...	4365435454	EA	1,025.00	7 EA	7,175.00 USD	Sent To Supplier	Partially Received With Returns	none	Do not Match
2 <input checked="" type="checkbox"/> Dell Latitude 6540 more info...	7698769547567	EA	1,250.00	3 EA	3,750.00 USD	Sent To Supplier	Fully Received	none	Do not Match
3 <input checked="" type="checkbox"/> Dell Color LaserJet Printer D545 more info...	34565467547	EA	399.00	4 EA	1,596.00 USD	Sent To Supplier	Fully Received	none	Do not Match
Subtotal								12,521.00	
Shipping								0.00	
Handling								0.00	
Total								12,521.00 USD	

16. Click on the **Comments** tab.

ECU MATERIALS MANAGEMENT

Orders > Search > Purchase Orders > Comments - PO P1315388

PO/Reference No. **P1315388 Revision 0** Available Actions

Supplier **Dell Marketing LP**

Status Purchase Order Revisions PO Approvals Shipments Change Requests Receipts Invoices **Comments** Attachments (1) History

Add Comment

Show comments for

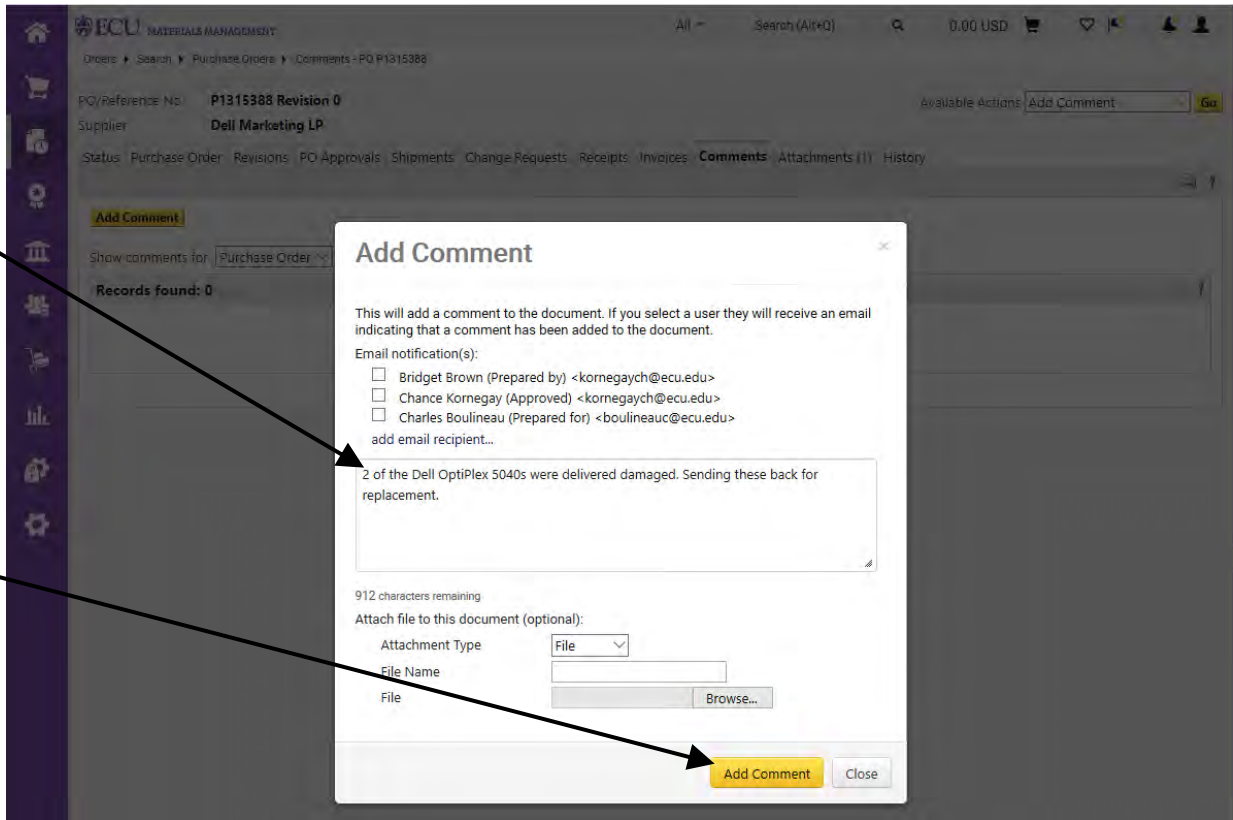
Records found: 0

No comments have been added

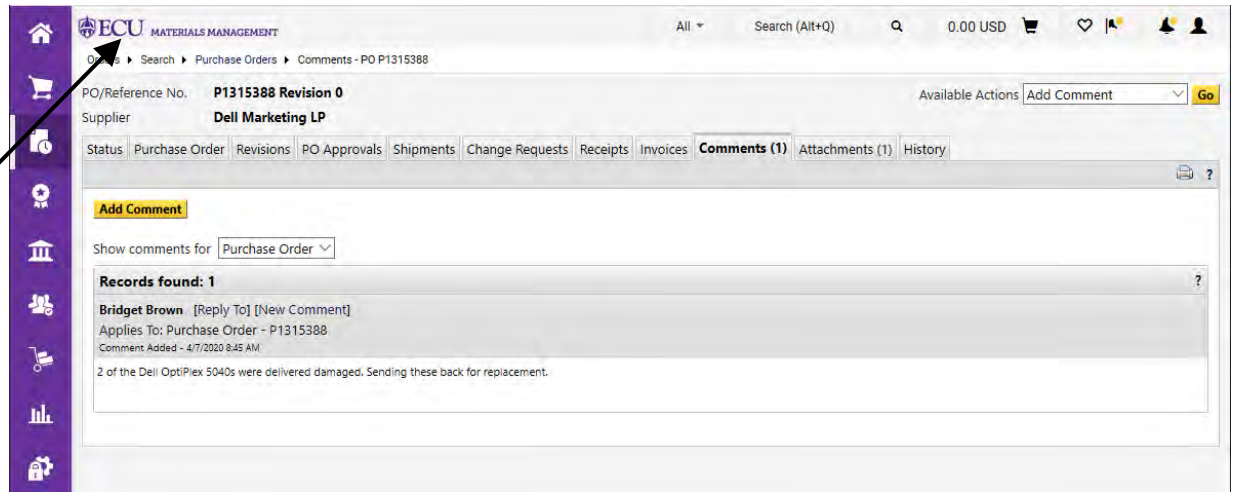
17. Click on the **Add Comment** button to indicate reason for return for Materials Management and Accounts Payable.

RETURN PROCESS

Last Updated on: 4/07/2020



18. Enter the reason for the return. **Note:** The comment will not be sent to anyone directly. It will be used to document reason for return on the PO.
19. Click on **Add Comment** button.



20. This completes the steps for this procedure. Click on **ECU** icon to return to the home page.

WITHDRAWING A REQUISITION

Last Updated on: 4/01/2020

1. Click the **User** icon.

2. Within the fly-out menu, select **My Pending Requisitions**.

1. Click the **User** icon.
2. Within the fly-out menu, select **My Pending Requisitions**.

3. The blue arrows in a circular pattern indicate: **Requisition Pending Approval**. Note: You can only withdraw requisitions that are pending approval.

4. Click on the **Requisition No** that you need to withdraw.

3. The blue arrows in a circular pattern indicate: **Requisition Pending Approval**. Note: You can only withdraw requisitions that are pending approval.
4. Click on the **Requisition No** that you need to withdraw.

WITHDRAWING A REQUISITION

Last Updated on: 4/01/2020

ECU MATERIALS MANAGEMENT

Purchase Order Number Search (Alt+Q) 0.00 USD

Orders Search Search Documents Summary - Requisition 2745225

Back to Results 2 of 238 Results

Available Actions: Withdraw Entire Requisition Go

Requisition PR Approvals PO Preview Comments Attachments History

Summary General FOAPAL / Ship Codes Supplier Info Taxes/S&H

General	Internal Note	Order Info
Priority Normal	Internal Info	Order Info
Department Administration and Finance (Administration and Finance)	Business Purpose / Note to Approvers	Backup Required x
Prepared by Bridget Brown	State Exempt Health Care	Pricing Ref #
Cart Name 2019-08-22 brownb 01	Internal Attachments	Special Instructions None
Accounting Date		Notes to Suppliers
Accruals		Attachments for all suppliers
Bill To		PO Clauses
East Carolina University		100 NC T&C
Accounts Payable		200 Funds
120 Reade St.		300 ECU PO conditions
Fin. Srv. Bldg.		view all clauses - (3)
ACCOUNTSPAYABLE@ecu.edu		
Greenville, NC 27858-4353		
United States		

View/edit by line item...

5. Click on PR Approval tab.

ECU MATERIALS MANAGEMENT

Purchase Order Number Search (Alt+Q) 0.00 USD

Orders Search Search Documents Approvals - Requisition 2556949

Back to Results 5 of 71 Results

Available Actions: Withdraw Entire Requisition Go

Requisition PR Approvals PO Preview Comments Attachments History

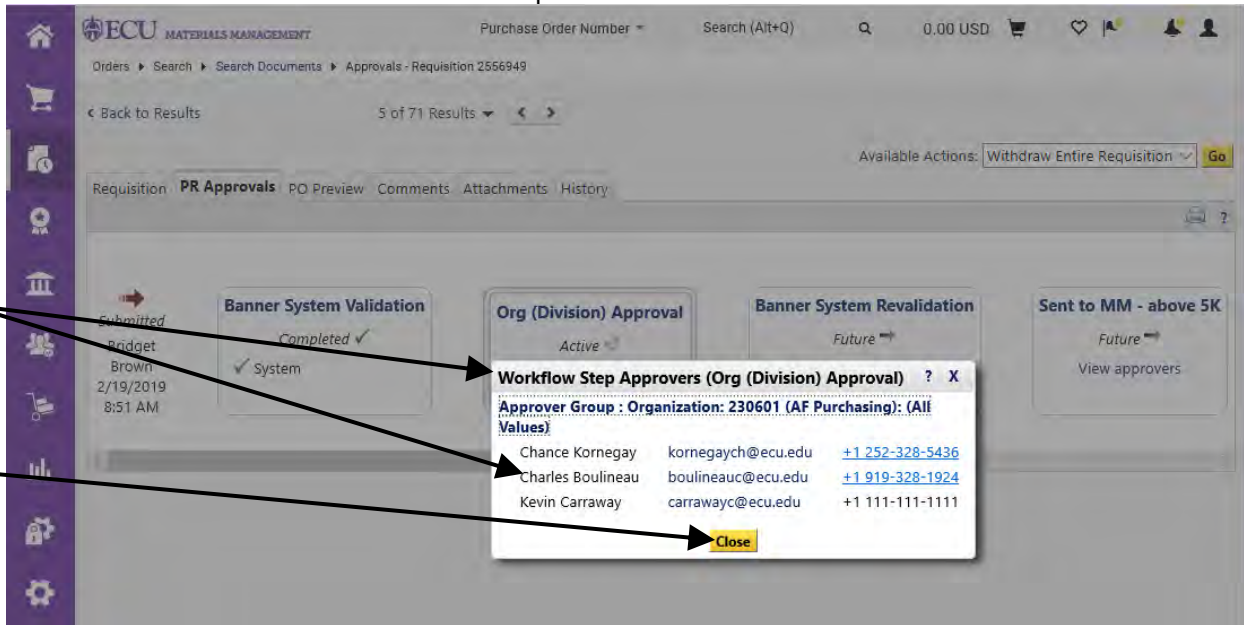
Submitted
Bridget Brown
2/19/2019
8:51 AM

Banner System Validation Completed ✓ ✓ System	Org (Division) Approval Active View approvers	Banner System Revalidation Future →	Sent to MM - above 5K Future → View approvers
--	--	---	--

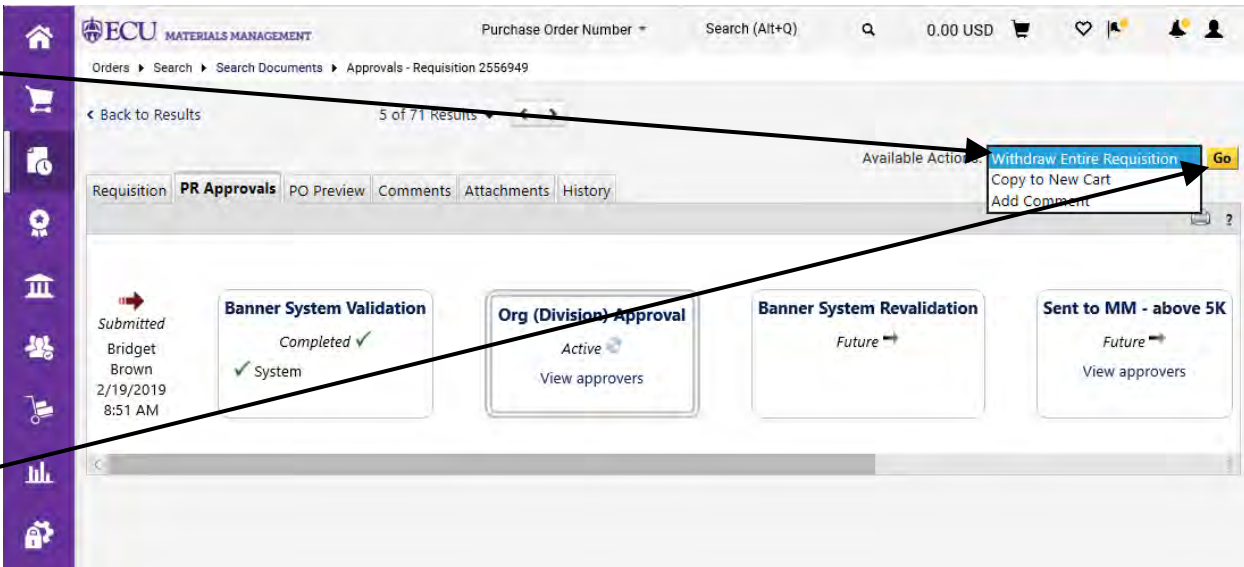
6. Notice the queue where requisition is waiting for approval.
7. Click on View approvers.

WITHDRAWING A REQUISITION

Last Updated on: 4/01/2020



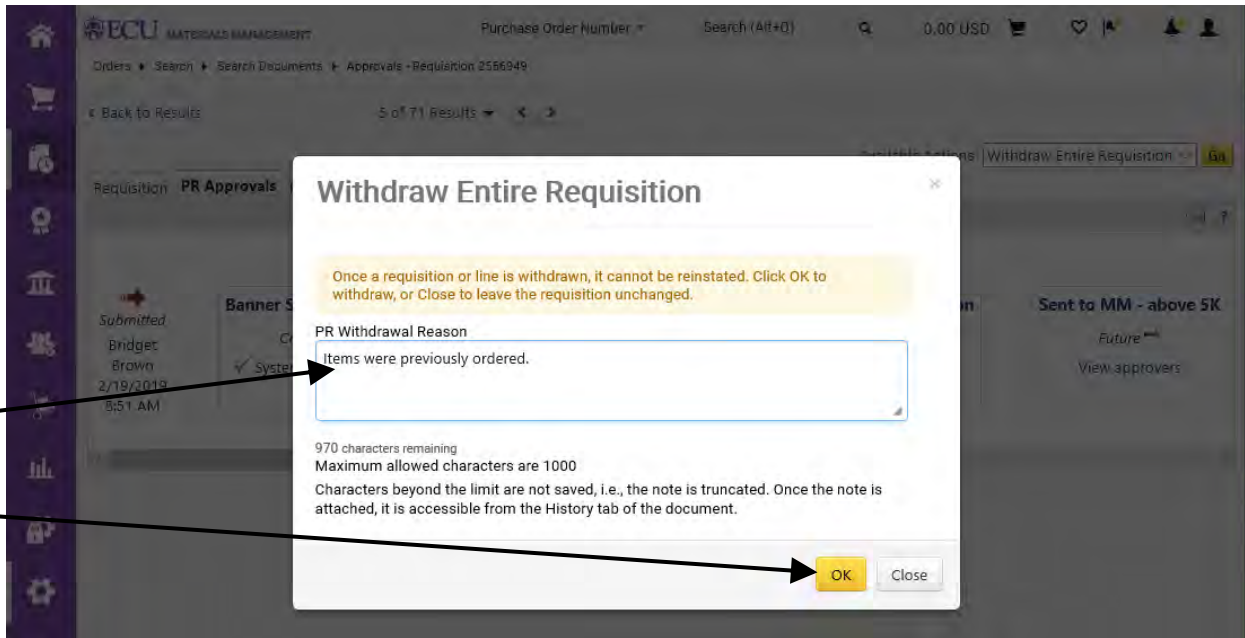
8. The **Workflow Step Approvers** pop-up will provide a listing of approvers with contact information (email & phone number). **Important Note:** Contact Division Approver, Materials Management, Central Storeroom, Medical Storeroom, HS Funds, Foundations, or Grants if you are planning to withdraw requisitions located in their queue.
9. Click on the **Close** button.



10. Select **Withdraw Entire Requisition** for the **Available Action** drop down box.
11. Click on **Go** button.

WITHDRAWING A REQUISITION

Last Updated on: 4/01/2020

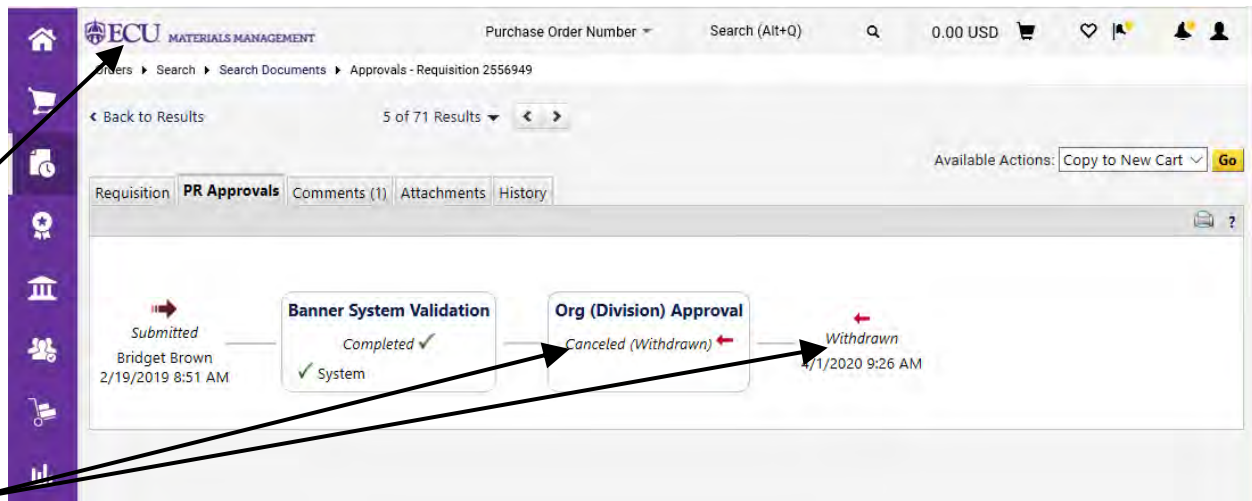


12.

13.

12. Type reason for withdrawing requisition.

13. Click the **OK** button.



15.

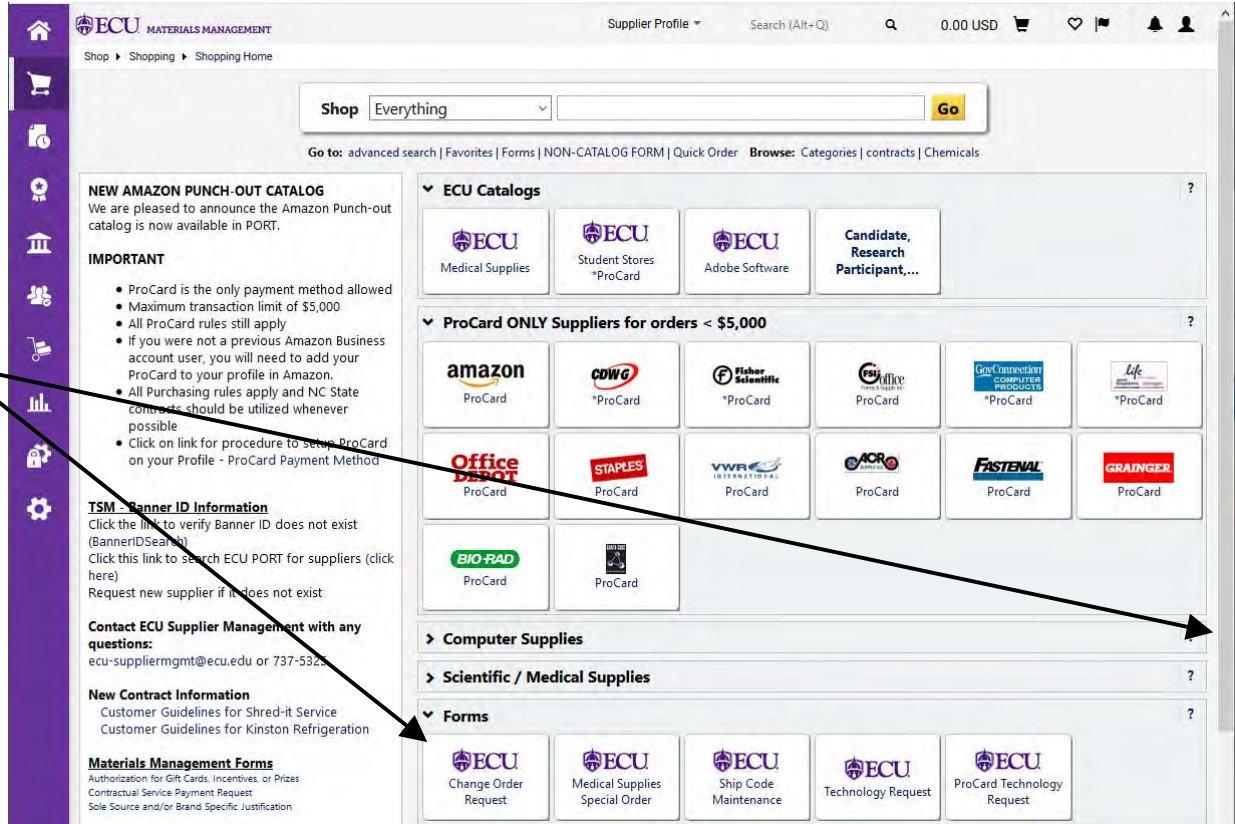
14.

14. Notice that the status of the requisition indicates **Withdrawn**.

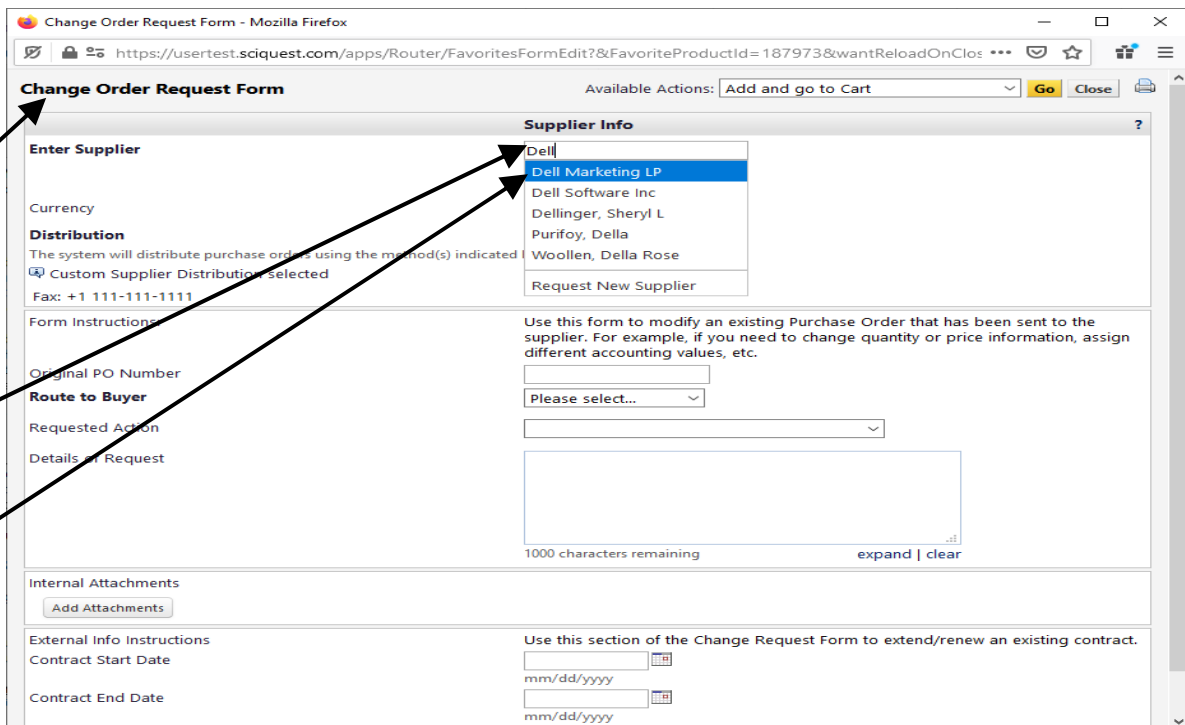
15. This completes the steps for this procedure. Click the **ECU** icon to go home.

CHANGE ORDER REQUEST

Last Updated on: 4/16/2020



1. From the home page scroll down to find the **Forms** showcase. Click on **Change Order Request** sticker.



2. A new window pops up to display **Change Order Request Form**.
3. Begin typing name of the new supplier until you see the desired supplier displayed.
4. Select desired supplier name.

CHANGE ORDER REQUEST

Last Updated on: 4/16/2020

Change Order Request Form - Mozilla Firefox
https://usertest.sciquest.com/apps/Router/FavoritesFormEdit?FavoriteProductId=187973&FavPageContext=28

Change Order Request Form Available Actions: Add and go to Cart **Go** Close

Supplier Info

Supplier Dell Marketing LP more info...
select different supplier

Fulfillment Address PO Purchase Order 1: (preferred)
One Dell Way
Bldg RR8
Round Rock, TX 78682-0384 US
select different fulfillment center

Currency USD

Distribution
The system will distribute purchase orders using the method(s) indicated below:
 Custom Supplier Distribution selected
Fax: +1 111-111-1111

Form Instructions: Use this form to modify an existing Purchase Order that has been sent to the supplier. For example, if you need to change quantity or price information, assign different accounting values, etc.

Original PO Number

Route to Buyer

Requested Action

Details of Request

940 characters remaining expand | clear

5. Notice supplier information has been populated.
6. Enter appropriate information for the following fields: **Original PO Number**, **Route to Buyer**, **Requested Action**, and **Details of Request**. **Important Note:** If your PO for the Change Order has Foundations Funds, you will need to select appropriate foundation (Athletic, ECU or Medical Foundation) for **Route to Buyer**.
7. Click **Go** button.

ECU MATERIALS MANAGEMENT Supplier Profile Search (Alt+Q) 0.00 USD

Shop > My Carts and Orders > Open My Active Shopping Cart > Cart - 2949328 - Draft Requisition

Almost ready to go! The list below needs to be addressed before the cart can be submitted.
• Required field: State Exempt

Shopping Cart for Sue Gaddis 1 Item(s) for a total of 0.00 USD

Save **Proceed to Checkout**

Priority Business Purpose / Note to add note... Backup Required
Prepared by Sue Gaddis Approvers State Exempt Special Instructions
Prepared for Sue Gaddis Notes to Suppliers add note...
Cart Name **Required field**

Supplier / Line Item Details

Show line details For selected line items | Add to Favorites **Go**

Dell Marketing LP more info...
PO Purchase Order 1
One Dell Way, Bldg RR8, Round Rock, TX 78682-0384 US
Free Shipping over 50.00 USD

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Change Order Request Form more info...			0.00	1	0.00 USD
Supplier subtotal					0.00 USD
Subtotal					0.00
Shipping					0.00
Handling					0.00
Total					0.00 USD

Save **Proceed to Checkout**

8. Click on link **Select from all values...** for **State Exempt**.

CHANGE ORDER REQUEST

Last Updated on: 4/16/2020

Almost ready to go! The list below needs to be addressed before the cart can be submitted.

- Required field: State Exempt

1 Item(s) for a total of **0.00** USD

Shopping Cart for Sue Gaddis

Priority: Normal Business Purpose / Note to Approvers: add note... Backup Required: Special Instructions: None

Prepared by: Sue Gaddis Prepared for: Sue Gaddis State Exempt: State Exempt Notes to Suppliers: add note...

Cart Name: 2020-04-17 gaddiss 01

Supplier / Line Item Details

Show line details

Dell Marketing LP more info...
 PO Purchase Order 1 edit
 One Dell Way, Bldg. BR8, Round Rock, TX 78682-0384 US
 Free Shipping over 50.00 USD

Product Description

/ Packaging	Unit Price	Quantity	Ext. Price
	0.00	1	0.00 USD
Supplier subtotal			0.00 USD
Subtotal			0.00
Shipping			0.00
Handling			0.00
Total			0.00 USD

Save Proceed to Checkout

- Click drop-down box and select **None of the Above**. **Note:** You must select one of these options, but none really apply.
- Click **Save** button.
- Click on **Proceed to Checkout** button. **Note:** Since this is a **Change Order Request**, you do not need to make any other changes at the cart header.

All done! The required information has been completed and this request is ready to be submitted.

Once you have reviewed the details, you may continue by clicking the button at the top of the page.

Submit Requisition

Go to Express Checkout Return to shopping cart Continue Shopping

Requisition PR Approvals PO Preview Comments Attachments History

Summary General FOAPAL / Ship Codes Supplier Info Taxes/S&H

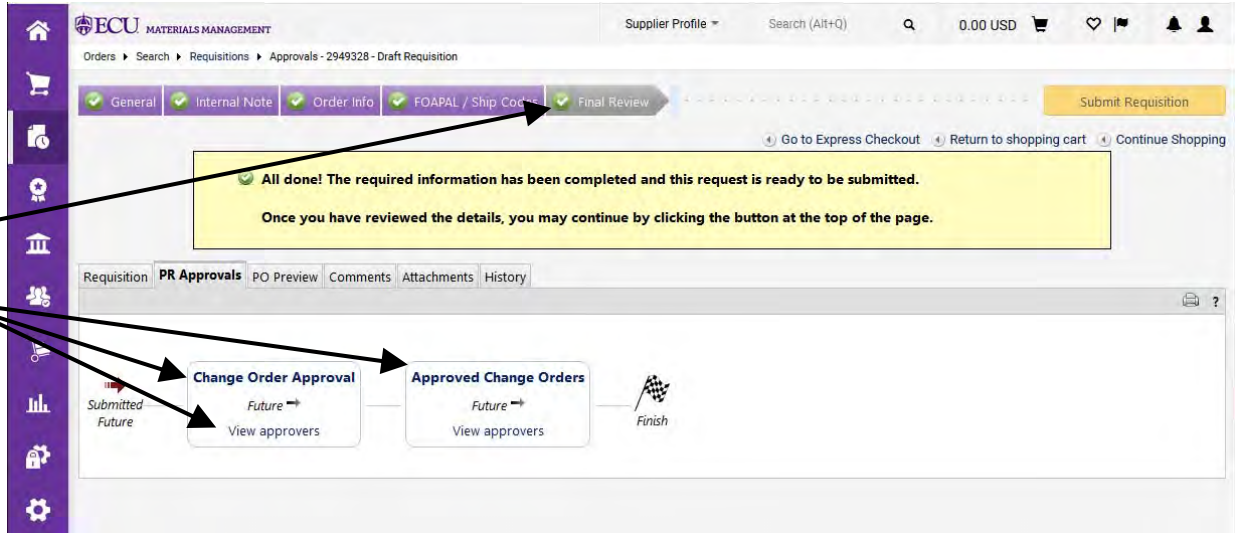
General	Internal Note	Order Info
Priority: Normal	Business Purpose / Note to Approvers: None of the Above	Backup Required: <input checked="" type="checkbox"/>
Department: AF Materials Management (AF Materials Management)	State Exempt: State Exempt	Pricing Ref #: <input type="text"/>
Prepared by: Sue Gaddis	Internal Attachments: Add Attachments	Special Instructions: None
Prepared for: Sue Gaddis		ITCS Approval: <input checked="" type="checkbox"/>
Cart Name: 2020-04-17 gaddiss 01		Notes to Suppliers: Attachments for all suppliers
Accounting Date: <input type="text"/>		Attachments for all suppliers: Add Attachments
Accruals: <input type="text"/>		PO Clauses: 100 NC T&C, 200 Funds, 300 ECU PO conditions

view all clauses - (3)

- Click on the **PR Approvals** step in the workflow. **Note:** Since this is a **Change Order Request**, you do not need to make any changes at the **Review** step (as long as you have set defaults for FOAP and ship code).

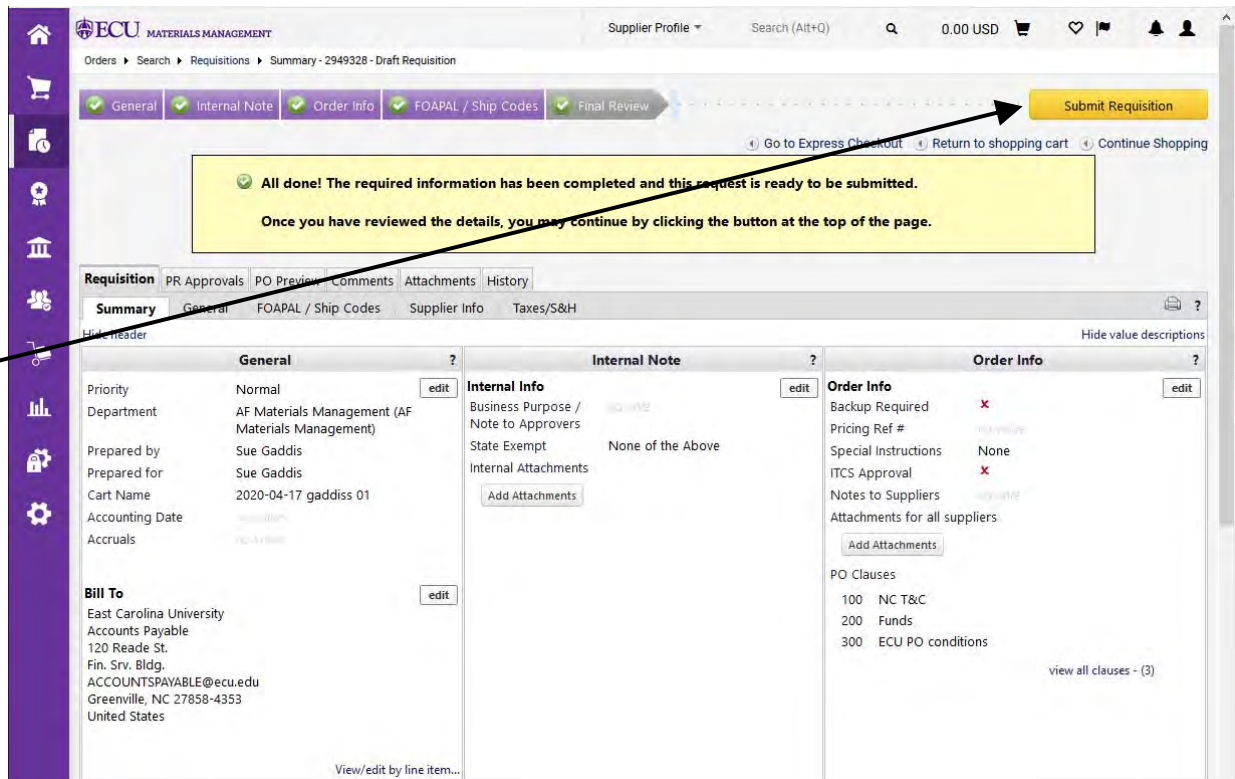
CHANGE ORDER REQUEST

Last Updated on: 4/16/2020



13. Notice steps the document will go through before the Change Order can be completed.

14. Click on **Final Review** guided workflow step. **Note:** You can click on view approver link for listing of approvers and their contact information if needed.



15. Click on **Submit Requisition** button.

CHANGE ORDER REQUEST

Last Updated on: 4/16/2020

Supplier Profile Search (Alt+Q) 0.00 USD

My Carts and Orders Open My Active Shopping Cart Submitted - Requisition 2949328

Requisition Submitted

Next Steps

You can view or print this at: Requisition 2949328, or via the Search Requisitions page

- View Approval Status
- Search for another item
- View order history
- Check the status of an order
- Return to your home page
- Create new draft cart

Requisition Summary

Requisition number	2949328 Quick View
Requisition status	Pending
Cart name	2020-04-17 gaddiss 01
Requisition date	4/17/2020
Requisition total	0.00 USD
Number of line items	1

17.

16.

16. You can track the change order request with the **Requisition number** that is provided.
17. This completes the steps for this procedure. Click the **ECU** icon to go home.

SHIP CODE MAINTENANCE

Last Updated on: 4/6/2020

The screenshot shows the ECU Materials Management website interface. On the left is a vertical navigation menu with icons for home, shopping, and various management tools. The main content area is titled 'NEW AMAZON PUNCH-OUT CATALOG' and includes an 'IMPORTANT' section with a list of ProCard-related rules. Below this is a 'Forms' section containing several ECU-branded stickers for different request types. A black box with the number '1.' and an arrow points to the 'Ship Code Maintenance' sticker in the 'Forms' section.

Shop Everything

Go to: advanced search | Favorites | Forms | NON-CATALOG FORM | Quick Order Browse: Categories | contracts | Chemicals

NEW AMAZON PUNCH-OUT CATALOG
We are pleased to announce the Amazon Punch-out catalog is now available in PORT.

IMPORTANT

- ProCard is the only payment method allowed
- Maximum transaction limit of \$5,000
- All ProCard rules still apply
- If you were not a previous Amazon Business account user, you will need to add your ProCard to your profile in Amazon.
- All Purchasing rules apply and NC State contracts should be utilized whenever possible
- Click on link for procedure to setup ProCard on your Profile - ProCard Payment Method

TSM - Banner ID Information
Click the link to verify Banner ID does not exist (BannerIDSearch)
Click this link to search ECU PORT for suppliers (click here)
Request new supplier if it does not exist

Contact ECU Supplier Management with any questions:
ecu-suppliermgmt@ecu.edu or 737-5325

New Contract Information
Customer Guidelines for Shred-it Service
Customer Guidelines for Kinston Refrigeration

Materials Management Forms
Authorization for Gift Cards, Incentives, Prizes
Contractual Service Payment Request
Sole-Source and/or Brand Specific Justification

ECU Student Stores Catalog
Enter ECU-002599 in hosted catalog search to view Apple products for the Student Stores.
Helpful Purchasing links:

- State Term Contracts (Alpha listing)
- Materials Management Web Page
- Basic Purchasing Procedures
- Guide to Materials Management
- Promotional Items
- Contract Delegation of Authority

[Click Here for PORT Training Manual](#)

ECU Catalogs

- ECU Medical Supplies
- ECU Student Stores *ProCard
- ECU Adobe Software
- Candidate, Research Participant,...

ProCard ONLY Suppliers for orders < \$5,000

- amazon ProCard
- CDWG *ProCard
- Fisher Scientific *ProCard
- AMIXE ProCard
- IBM Business Partner *ProCard
- Life Science *ProCard
- Office DEPOT ProCard
- STAPLES ProCard
- VWR INTERNATIONAL ProCard
- ACR ProCard
- FASTENAL ProCard
- GRANDGER ProCard
- BIO-RAD ProCard
- ProCard

Computer Supplies

- Apple
- DELL
- Lenovo

Scientific / Medical Supplies

- Biocompare
- Dental

Forms

- ECU Change Order Request
- ECU Medical Supplies Special Order
- ECU Ship Code Maintenance
- ECU Technology Request
- ECU ProCard Technology Request

Powered by JADG/AER | Privacy Policy

1. From the home page, navigate to the **Forms** showcase and click on **Ship Code Maintenance** sticker.

SHIP CODE MAINTENANCE

Last Updated on: 4/6/2020

2. A new window pops up to display the **Ship Code Maintenance Form**.
3. Select either **Create New Ship Code** radio button or **Edit Existing Ship Code** radio button. **Note:** You need to provide the ship code if your requesting an edit to an exist ship code
4. Provide the following information as appropriate for the shipping address: **Department, Street, Building, Floor / Room, City, State, and Zip Code**. **Note:** Provide the name if the ship code is outside Greenville, NC.
5. If you are requesting a ship code that is outside Greenville, NC, you will need to provide a business reason for the requested address.
6. Click the **Go** button.

SHIP CODE MAINTENANCE

Last Updated on: 4/6/2020

9. Almost ready to go! The list below needs to be addressed before the cart can be submitted.

- Required field: State Exempt

8. Save

7. None of the Above

Product Description	Unit Price	Quantity	Ext. Price
1 Ship Code Maintenance	0.00	1	0.00 USD
Supplier subtotal			0.00 USD
Subtotal			0.00
Shipping			0.00
Handling			0.00
Total			0.00 USD

7. Select **None of the Above** for **State Exempt**.
8. Click on **Save** button.
9. Click on **Proceed to Checkout** button. **Important Notes:** Since this is a **Ship Code Request**, you do not need to make any changes at the cart header, and you **DO NOT** combine this request on the same cart as a regular requisition or Change Order Request.

SHIP CODE MAINTENANCE

Last Updated on: 4/6/2020

Orders > Search > Requisitions > Summary - 2941063 - Draft Requisition

General Internal Note Order Info FOAPAL / Ship Codes Final Review Submit Requisition

Go to Express Checkout Return to shopping cart Continue Shopping

All done! The required information has been completed and this request is ready to be submitted.
Once you have reviewed the details, you may continue by clicking the button at the top of the page.

Requisition PR Approvals PO Preview Comments Attachments History

Summary General FOAPAL / Ship Codes Supplier Info Taxes/S&H

General	Internal Note	Order Info
Priority Normal <input type="button" value="edit"/>	Internal Info Business Purpose / <i>no note</i>	Order Info Backup Required ✖ <input type="button" value="edit"/>
Department Administration and Finance (Administration and Finance)	Note to Approvers	Pricing Ref # <i>no value</i>
Prepared by Bridget Brown	State Exempt None of the Above	Special Instructions None
Prepared for Bridget Brown	Internal Attachments	Notes to Suppliers <i>no note</i>
Cart Name 2020-04-06 brownb 03	<input type="button" value="Add Attachments"/>	Attachments for all suppliers
Accounting Date <i>no value</i>		<input type="button" value="Add Attachments"/>
Accruals <i>no value</i>		PO Clauses
Bill To East Carolina University Accounts Payable 120 Reade St. Fin. Srv. Bldg. ACCOUNTSPAYABLE@ecu.edu Greenville, NC 27858-4353 United States <input type="button" value="edit"/>		100 NC T&C 200 Funds 300 ECU PO conditions view all clauses - (3)

View/edit by line item...

10. Click on **PR Approvals** step in the workflow. **Note:** Since this is a **Ship Code Request**, you do not need to make any changes at the **Review** step (as long as you have set defaults for FOAP and ship code).

Orders > Search > Requisitions > Approvals - 2941063 - Draft Requisition

General Internal Note Order Info FOAPAL / Ship Codes Final Review Submit Requisition

Go to Express Checkout Return to shopping cart Continue Shopping

All done! The required information has been completed and this request is ready to be submitted.
Once you have reviewed the details, you may continue by clicking the button at the top of the page.

Requisition PR Approvals PO Preview Comments Attachments History

Submitted Future Finish

Forms Approval
View approvers

11. Notice **Forms Approval** step for this request. **Note:** PORT Administrators are approvers for completing the request.

12. Click on **Final Review** step.

SHIP CODE MAINTENANCE

Last Updated on: 4/6/2020

13.

13. Click on **Submit Requisition** button.

15.

14.

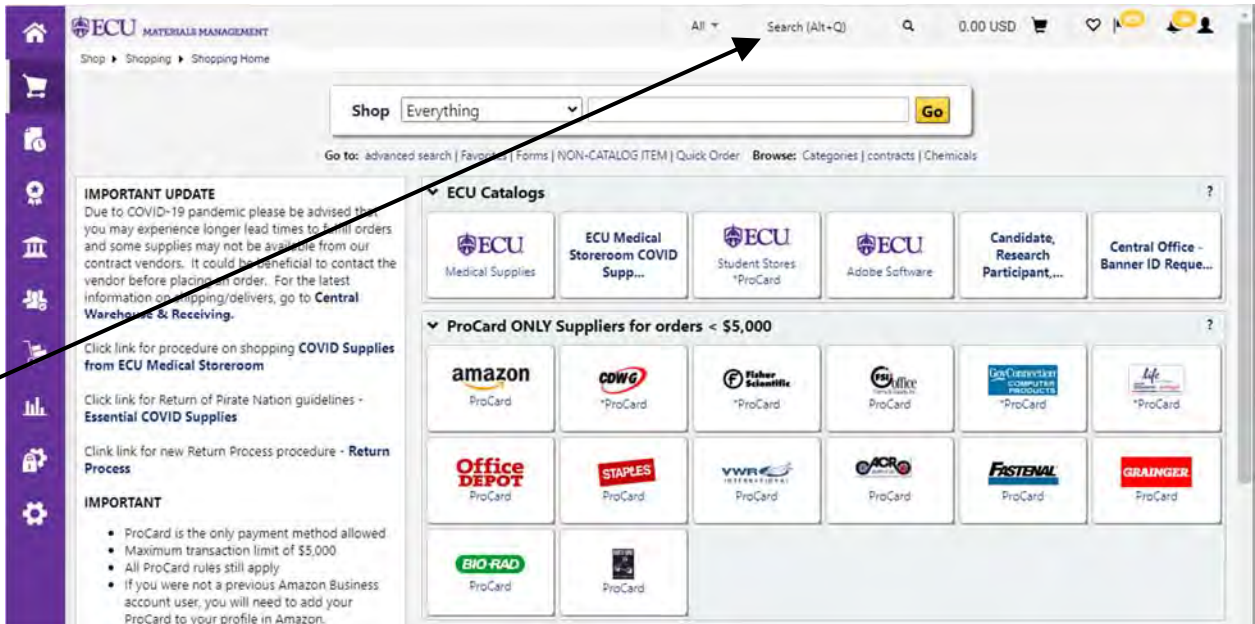
Requisition Summary	
Requisition number	2941063 Quick View
Requisition status	Pending
Cart name	2020-04-06 brownb 03
Requisition date	4/6/2020
Requisition total	0.00 USD
Number of line items	1

14. You can track your ship code request with the **Requisition number** that is provided.

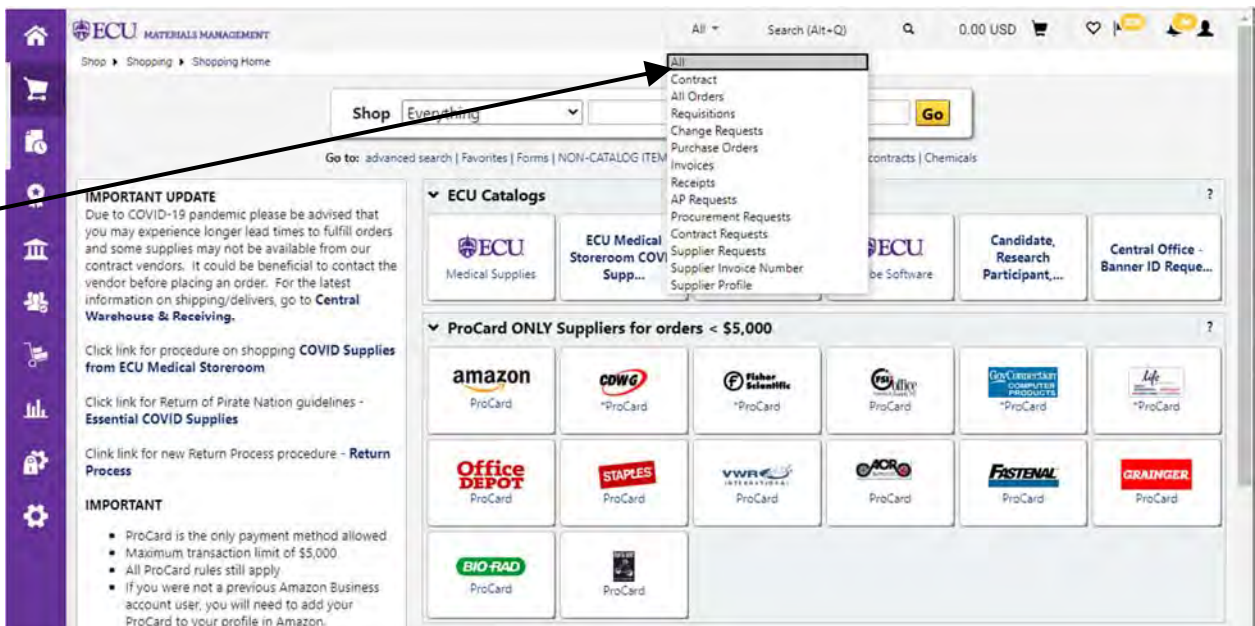
15. This completes the steps for this procedure. Click the **ECU** icon to go home.

SEARCH BY DOCUMENT NUMBER

Last Updated on: 7/17/2020



1. Perform a **Quick Search** for any document type by using the search bar.

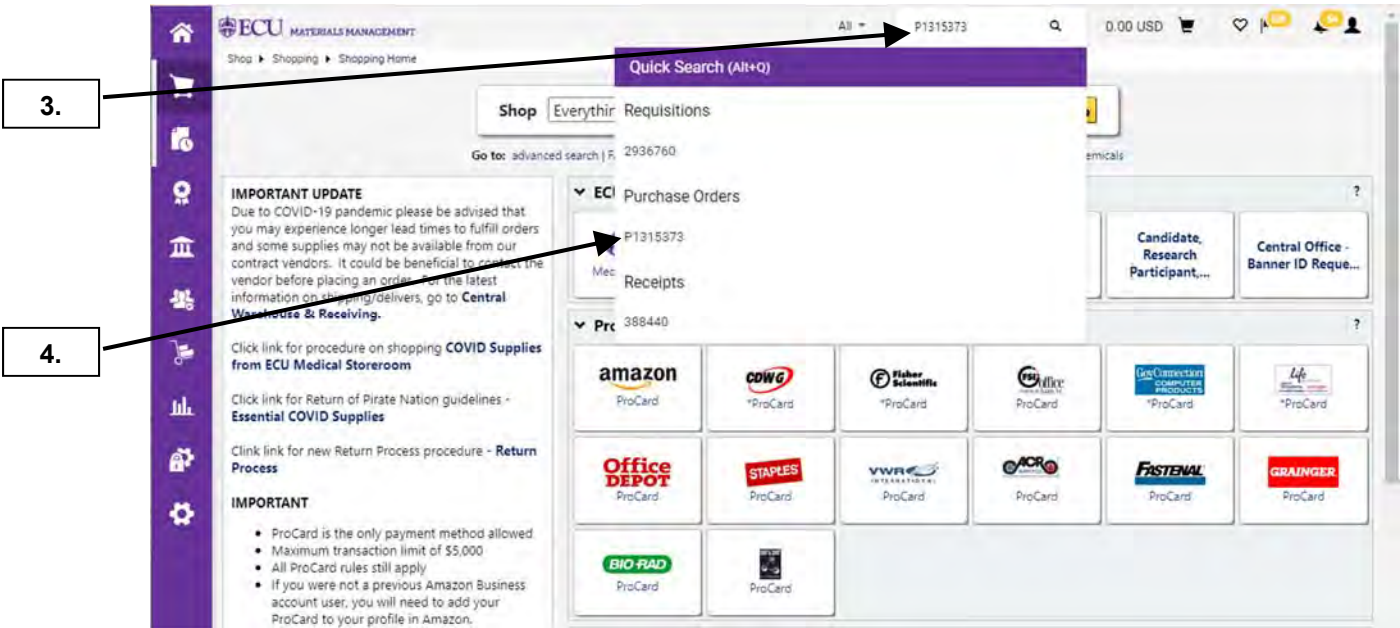


2. Select **All** from the drop-down menu to retrieve any document related to the number typed into the **Search Bar**.

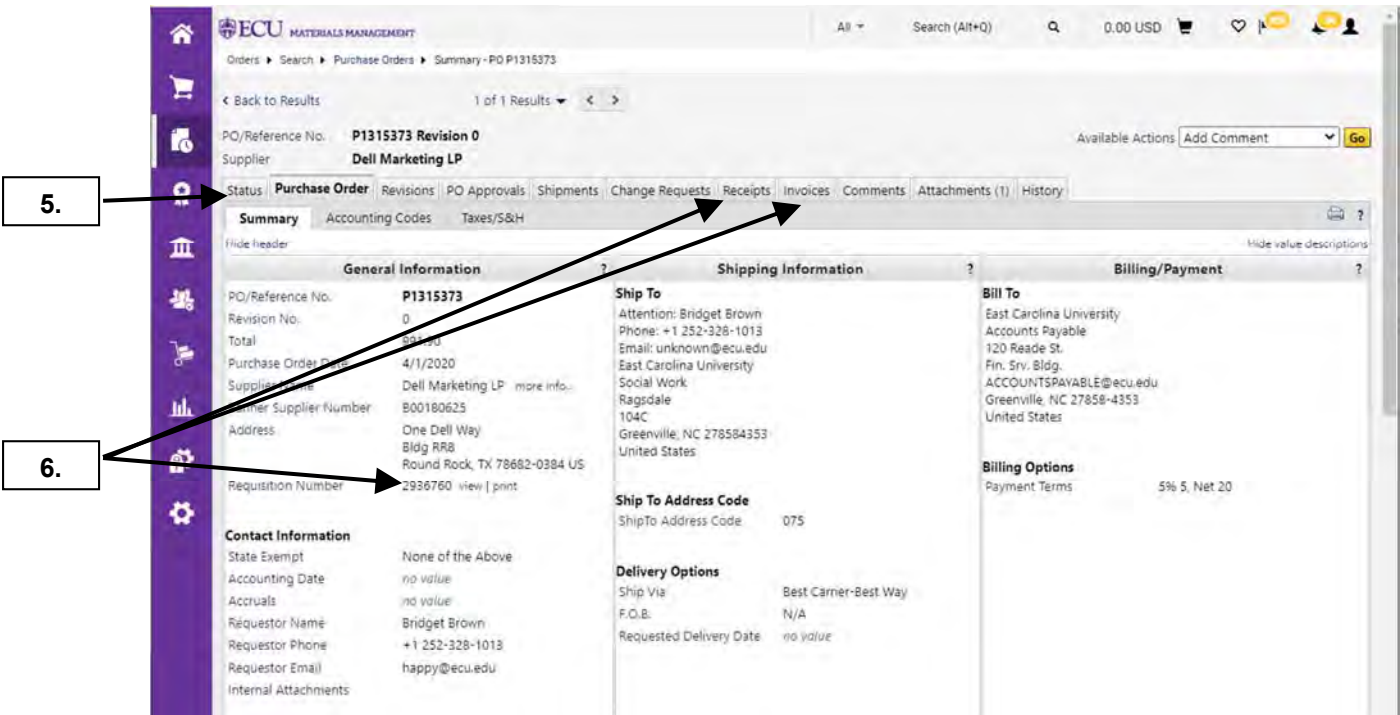
Note: Select a specific document type from the list if appropriate.

SEARCH BY DOCUMENT NUMBER

Last Updated on: 7/17/2020



3. Type your document number and click the **Search** icon.
4. Click the document number for the **Purchase Order** to open the document.
Note: Related documents can be found in the **Quick Search** including **Requisitions** and **Receipts**.



5. From the open document, use the navigation tabs to retrieve more details about the document.
6. Related documents can be recalled including **Receipts**, **e-Invoices**, and the **Requisition**.
7. This completes the steps for searching by document number.

VIEW ALL DOCUMENT HISTORY

Last Updated on: 4/01/2020

Orders > Search > Search Documents > Status - PO P1315376

PO/Reference No. **P1315376 Revision 0** Available Actions: Add Comment Go

Supplier **Lenovo (United States) Inc**

Status Purchase Order Revisions PO Approvals Shipments Change Requests Receipts Invoices Comments Attachments (1) **History**

General Information

PO/Reference No. **P1315376**
Revision No. 0
Supplier Name **Lenovo (United States) Inc** more info...
Purchase Order Date 4/1/2020
Total 6,426.88
Requisition Number 2936747 view print
Requestor Name **Bridget Brown**
Requestor Email **happy@ecu.edu**
Requestor Phone **+1 252-328-1013**

Document Status

Workflow **Completed**
(4/1/2020 11:43 AM)
Distribution The system distributed the purchase order using the method(s) indicated below the last time it was distributed:
Email (Plain Text): **b2btest@lenovo.com**
Distribution Date/Time 4/1/2020 11:42 AM
Supplier Sent To Supplier view

Line Item Status

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	Supplier	Receiving	Invoicing	Matching
1 <input checked="" type="checkbox"/> Mid-Level Laptop - ThinkPad T490 CTO <input checked="" type="checkbox"/> more info...	20N3CT01WW	EA	1,396.72	4 EA	5,586.88 USD	Sent To Supplier	Fully Received	none	Do not Match
2 <input checked="" type="checkbox"/> ThinkPad USB-C Dock Gen 2 <input checked="" type="checkbox"/> more info...	40AS0090US	EA	165.00	4 EA	660.00 USD	Sent To Supplier	Fully Received	none	Do not Match
3 <input checked="" type="checkbox"/> Lenovo 65W Standard AC Adapter (USB Type-C)- US/Can/Mex <input checked="" type="checkbox"/> more info...	4X20M26268	EA	45.00	4 EA	180.00 USD	Sent To Supplier	Fully Received	none	Do not Match
Subtotal								6,426.88	
Shipping								0.00	
Handling								0.00	
Total								6,426.88 USD	

1. Open any document (Requisition, Purchase Order, Receipt, or Invoice) in PORT. In this example, we will use a Purchase Order.
2. Click on the **History** tab.

Orders > Search > Search Documents > History - PO P1315376

PO/Reference No. **P1315376 Revision 0** Available Actions: Add Comment Go

Supplier **Lenovo (United States) Inc**

Status Purchase Order Revisions PO Approvals Shipments Change Requests Receipts Invoices Comments Attachments (1) **History**

Click to filter history ? Export CSV

Results Per Page 20 **Records found: 19** Page 1 of 1 ?

Line No	Revision No.	Date/Time	User	Step(s)	Action	Field Name	From	To	Note
Line 3	1	4/1/2020 11:43 AM	Bridget Brown		PO modified	Match status changed	No Matches	Do not Match	
Line 2	1	4/1/2020 11:43 AM	Bridget Brown		PO modified	Match status changed	No Matches	Do not Match	
Line 1	1	4/1/2020 11:43 AM	Bridget Brown		PO modified	Match status changed	No Matches	Do not Match	
	original	4/1/2020 11:43 AM	System		PO Approvals completed				
	original	4/1/2020 11:43 AM	System	Supplies PO Export	PO Export sent to external system				PO was queued up for submission
	original	4/1/2020 11:43 AM	System		Received PO dispatched status from Banner				

3. Click on **Click to filter history**.

VIEW ALL DOCUMENT HISTORY

Last Updated on: 4/01/2020

ECU MATERIALS MANAGEMENT

Purchase Order Number Search (Alt+Q) 0.00 USD

Orders Search Search Documents History - PO P1315376

PO/Reference No. **P1315376 Revision 0** Available Actions Add Comment Go

Supplier **Lenovo (United States) Inc**

Status Purchase Order Revisions PO Approvals Shipments Change Requests Receipts Invoices Comments Attachments (1) **History**

Filters ?

Filters

Changes for last revision

Changes since last revision

Select Filter

Export CSV

Results Per Page 20 Records found: 19 Page 1 of 1 ?

Line No	Revision No	Date/Time	User	Step(s)	Action	Field Name	From	To	Note
Line 3	1	4/1/2020 11:43 AM	Bridget Brown		PO modified	Match status changed	No Matches	Do not Match	
Line 2	1	4/1/2020 11:43 AM	Bridget Brown		PO modified	Match status changed	No Matches	Do not Match	
Line 1	1	4/1/2020 11:43 AM	Bridget Brown		PO modified	Match status changed	No Matches	Do not Match	
	original	4/1/2020 11:43 AM	System		PO Approvals completed				
	original	4/1/2020 11:43 AM	System	Supplies PO Export	PO Export sent to external system				PO was queued up for submission

4. Click the **Filters** drop down box and choose **Select Filter**.

ECU MATERIALS MANAGEMENT

Purchase Order Number Search (Alt+Q) 0.00 USD

Orders Search Search Documents History - PO P1315376

PO/Reference No. **P1315376 Revision 0** Available Actions Add Comment Go

Supplier **Lenovo (United States) Inc**

Status Purchase Order Revisions PO Approvals Shipments Change Requests Receipts Invoices Comments Attachments (1) **History**

Filters ?

Filters Select Filter

Start date mm/dd/yyyy

End date mm/dd/yyyy

Show history for: All

Requisition

Purchase Order

Invoice

Receipt

Export CSV

Results Per Page 20 Records found: 19 Page 1 of 1 ?

Line No	Revision No	Date/Time	User	Step(s)	Action	Field Name	From	To	Note
Line 3	1	4/1/2020 11:43 AM	Bridget Brown		PO modified	Match status changed	No Matches	Do not Match	
Line 2	1	4/1/2020 11:43 AM	Bridget Brown		PO modified	Match status changed	No Matches	Do not Match	
Line 1	1	4/1/2020 11:43 AM	Bridget Brown		PO modified	Match status changed	No Matches	Do not Match	
	original	4/1/2020 11:43 AM	System		PO Approvals completed				

5. Click the **Shows history for** drop down box and choose **All**.

VIEW ALL DOCUMENT HISTORY

Last Updated on: 4/01/2020

ECU MATERIALS MANAGEMENT

Purchase Order Number Search (Alt+Q) 0.00 USD

Orders Search Search Documents History - PO P1315376

PO/Reference No. **P1315376 Revision 0** Available Actions Add Comment Go

Supplier **Lenovo (United States) Inc**

Status Purchase Order Revisions PO Approvals Shipments Change Requests Receipts Invoices Comments Attachments (1) **History**

Filters

Filters Select Filter

Start date mm/dd/yyyy

End date mm/dd/yyyy

Show history for All

Apply

Export CSV

Results Per Page 20 Records found: 19 Page 1 of 1

Line No	Revision No.	Date/Time	User	Step(s)	Action	Field Name	From	To	Note
Line 3	1	4/1/2020 11:43 AM	Bridget Brown		PO modified	Match status changed	No Matches	Do not Match	
Line 2	1	4/1/2020 11:43 AM	Bridget Brown		PO modified	Match status changed	No Matches	Do not Match	
Line 1	1	4/1/2020 11:43 AM	Bridget Brown		PO modified	Match status changed	No Matches	Do not Match	
	original	4/1/2020 11:43 AM	System		PO Approvals completed				

6. Click **Apply** button. This will allow you to see all document history for the Purchase Order (Requisition, Purchase Order, Receipt, and Invoice if the supplier is an e-Invoice supplier).

ECU MATERIALS MANAGEMENT

Purchase Order Number Search (Alt+Q) 0.00 USD

Orders Search Search Documents History - PO P1315376

PO/Reference No. **P1315376 Revision 0** Available Actions Add Comment Go

Supplier **Lenovo (United States) Inc**

Status Purchase Order Revisions PO Approvals Shipments Change Requests Receipts Invoices Comments Attachments (1) **History**

Click to filter history

Export CSV

Results Per Page 20 Records found: 49 Page 1 of 1

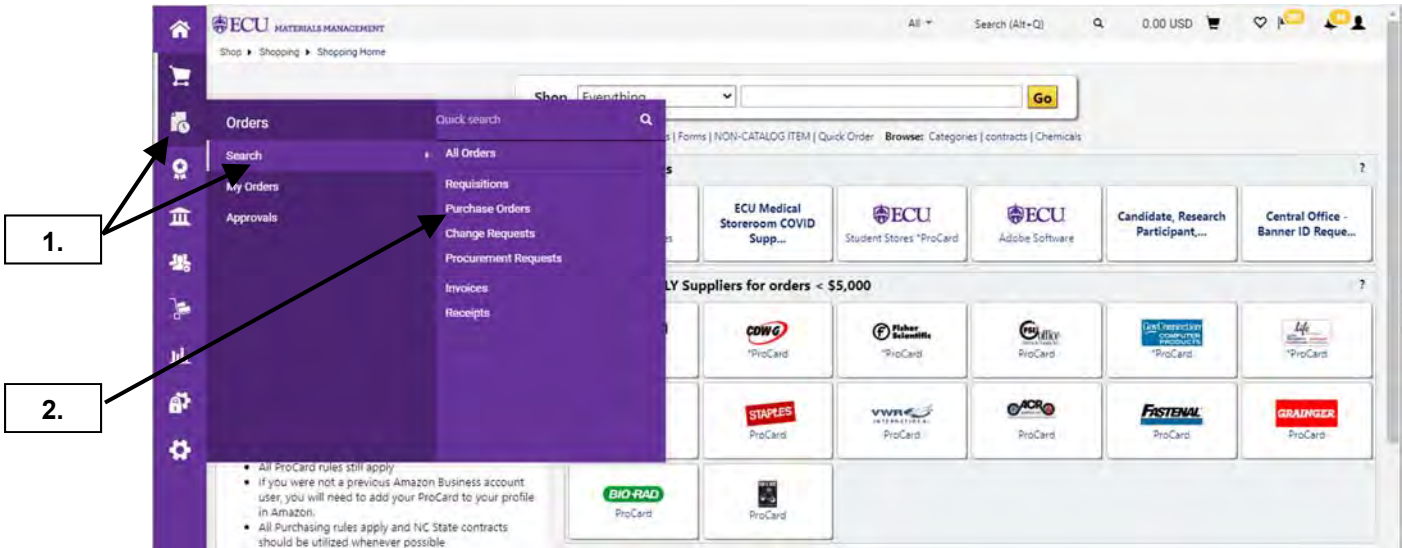
Line No	Revision No.	Date/Time	User	Applies To	Step(s)	Action	Field Name	From	To	Note
		4/1/2020 11:44 AM	Bridget Brown	Receipt - 388148		Completed				
		4/1/2020 11:43 AM	Bridget Brown	Receipt - 388148		Added		empty	P1315376	
Line 3	1	4/1/2020 11:43 AM	Bridget Brown	Purchase Order - P1315376		PO modified	Match status changed	No Matches	Do not Match	
Line 2	1	4/1/2020 11:43 AM	Bridget Brown	Purchase Order - P1315376		PO modified	Match status changed	No Matches	Do not Match	
Line 1	1	4/1/2020 11:43 AM	Bridget Brown	Purchase Order - P1315376		PO modified	Match status changed	No Matches	Do not Match	
		4/1/2020 11:43 AM	Bridget Brown	Receipt - 388147		Completed				
P1315376-3		4/1/2020 11:43 AM	Bridget Brown	Receipt - 388147		Modified	Qty/UOM ordered	4	0	

7. From here you can change **Results per page** or click on **next page** to see all document history.

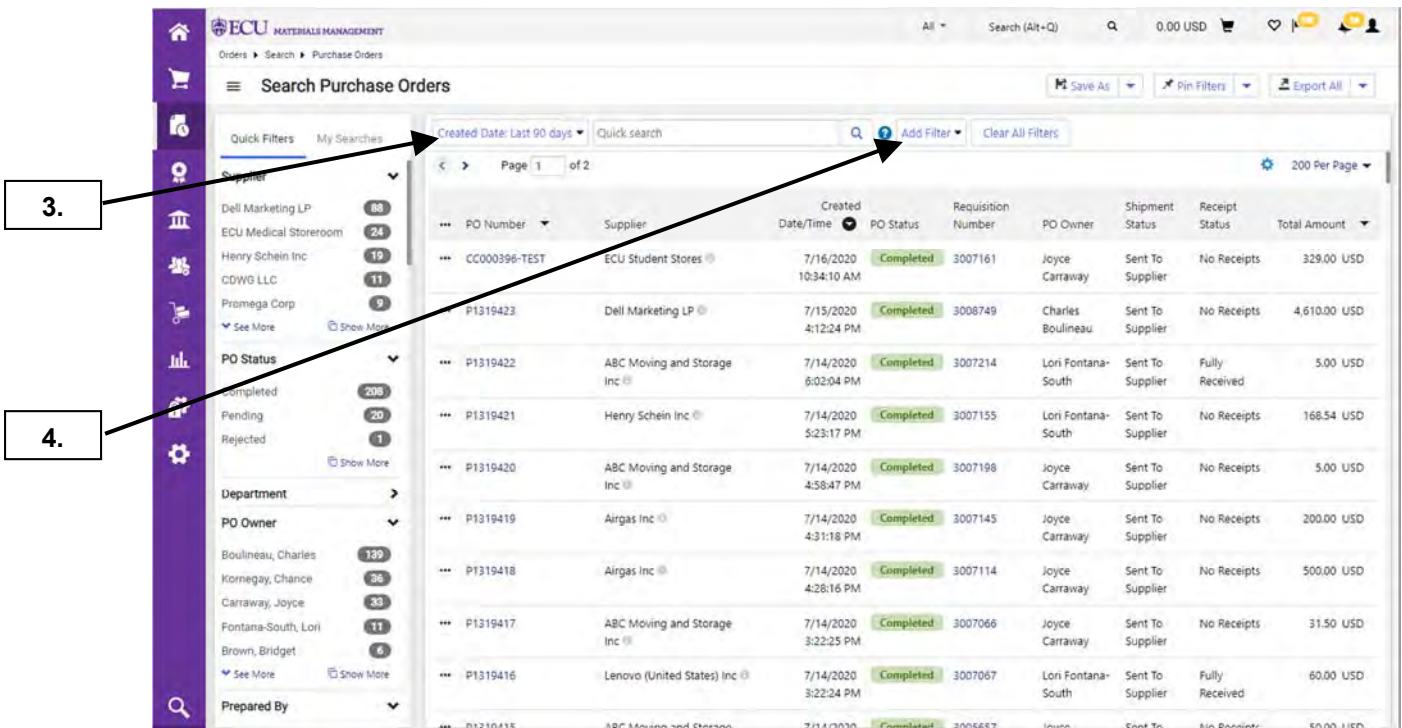
8. This completes the steps for this procedure. Click on **ECU** icon to return to the home page.

Document Search Results

Last Updated on: 7/17/2020



1. Hover on **Orders** icon then Search.
2. Select **Purchase Orders**.



3. Document visibility is controlled by institutional division. The default date parameter is Last 90 days.
4. Search result columns can be displayed in ascending or descending order for **PO Number**, **Created Date**, and **Total Amount**.

Document Search Results

Last Updated on: 7/17/2020

The screenshot shows the 'Search Purchase Orders' interface. On the left, there are filters for 'Supplier' and 'PO Status'. The main area displays a table of search results. A callout box labeled '5.' points to a gear icon in the top right corner of the search results table, which is used to configure the columns displayed.

PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Total Amount
P1316449	Dell Marketing LP	4/21/2020 11:38:17 AM	Completed	2950254	Charles Boulineau	Sent To Supplier	1,045.25 USD
P1316450	Dell Marketing LP	4/21/2020 11:39:46 AM	Completed	2950256	Charles Boulineau	Sent To Supplier	3,135.75 USD
P1316451	Dell Marketing LP	4/21/2020 11:41:45 AM	Completed	2950259	Charles Boulineau	Sent To Supplier	3,135.75 USD
P1316452	Dell Marketing LP	4/21/2020 1:57:41 PM	Completed	2950355	Charles Boulineau	Sent To Supplier	3,135.75 USD
P1316453	Dell Marketing LP	4/21/2020 2:02:10 PM	Completed	2950314	Charles	Sent To	4,047.05 USD

5. Click the **Configure Columns** icon to modify the columns of data displayed in your search result.

The screenshot shows the 'Configure Column Display' dialog box. It contains a list of available columns on the left and a list of currently displayed columns on the right. Callout box '6.' points to the 'Account*' checkbox, and callout box '7.' points to the 'Shipment Status' item in the list of currently displayed values.

Configure Column Display

Reflects the columns defined for the current search. Customizations will apply to the lifetime of the current search unless the search is saved. Columns marked with an * are custom defined data elements

Type to Filter Available Columns...

Account* Accounting Date Accruals * Activity * AP Status Approval Actions Approval Steps Assigned Buyer * Backup Requested * Buyer Contact Info * Change Request No.

Pin Columns as my defaults

PO Number Supplier Created Date/Time PO Status Requisition Number PO Owner Shipment Status Total Amount

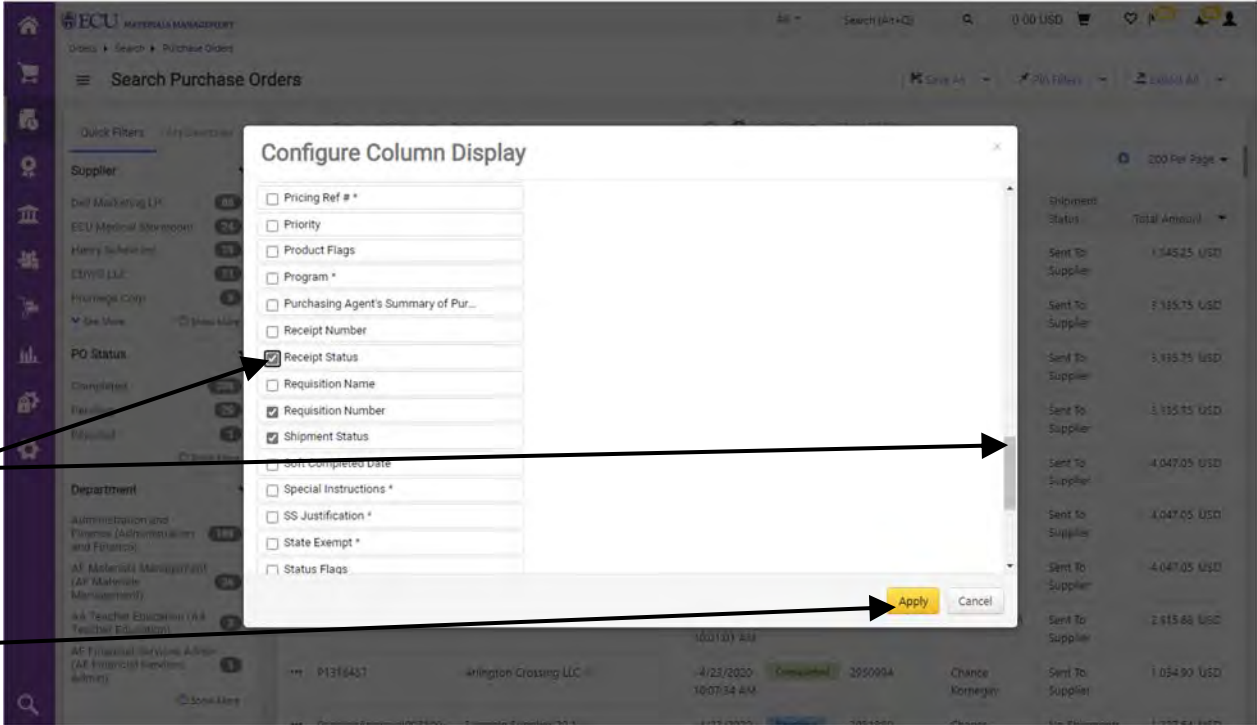
Apply Cancel

6. Check the check box in any value to be displayed in the search results pane.

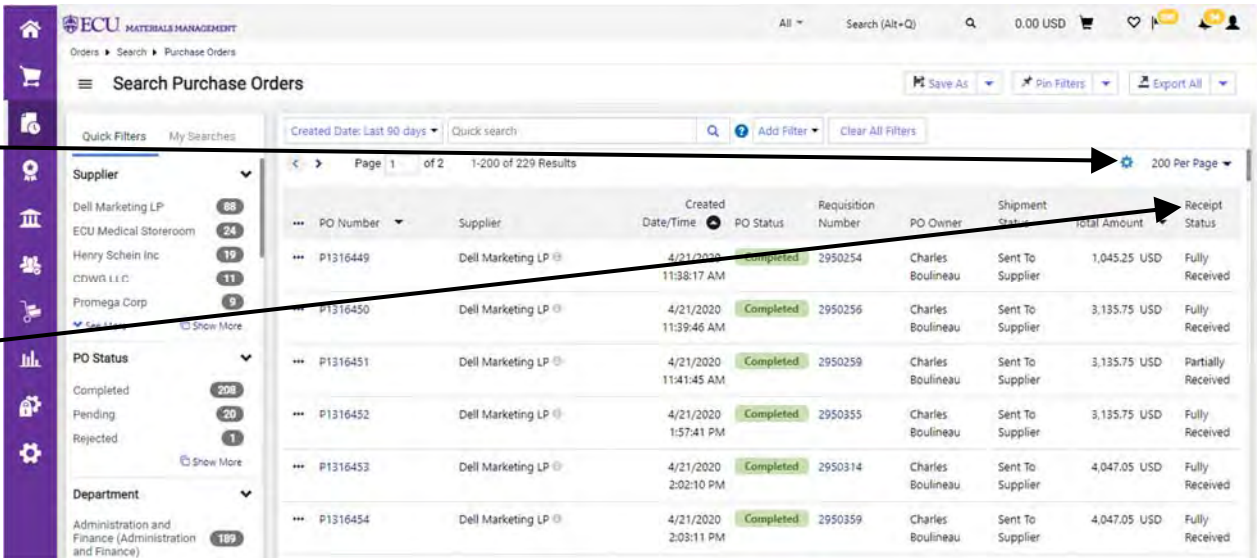
7. The list on the right are the currently displayed values in the search results pane. The order of their position to be displayed can be modified by clicking the up and down arrows to change position of dragging the value to the position desired.

Document Search Results

Last Updated on: 7/17/2020



8. Scroll down the optional values list to find **Receipt Status**. Check the box to add the value to your search result display.
9. Click **Apply**



10. Notice the **Receipt Status** column has been added to your search results.
11. Click on the **Configure Columns** icon to make the displayed columns your default.

Document Search Results

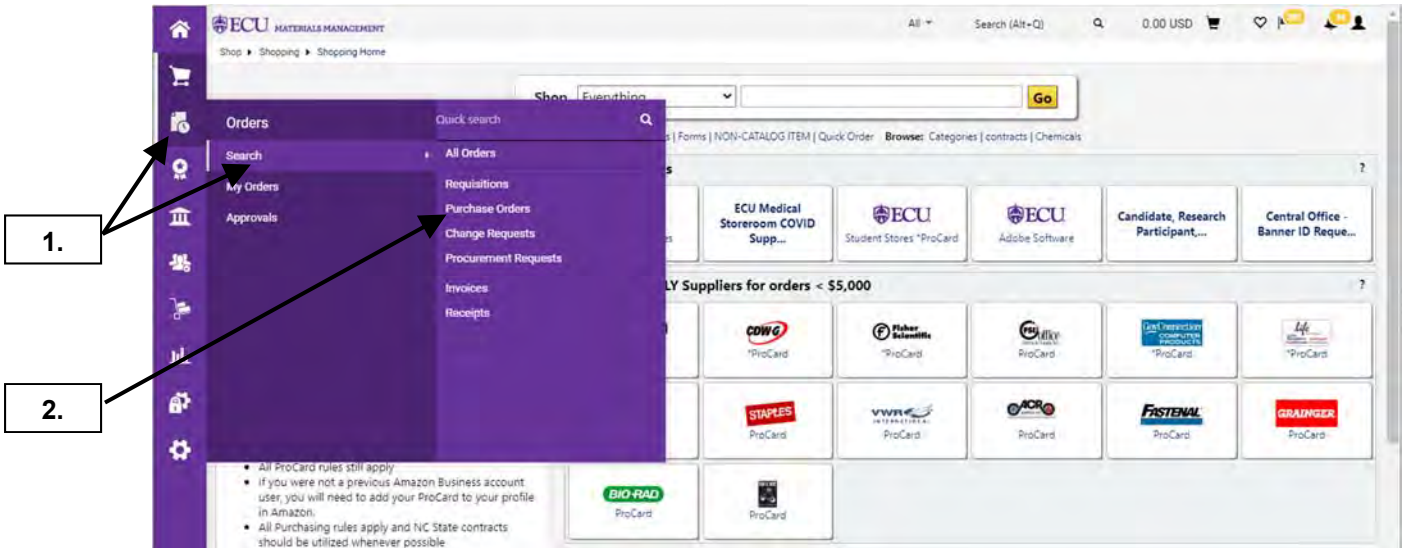
Last Updated on: 7/17/2020

12. Check the **Pin Columns as my defaults** box to pin your selected filters so that they become your default filters each time you return to the search.

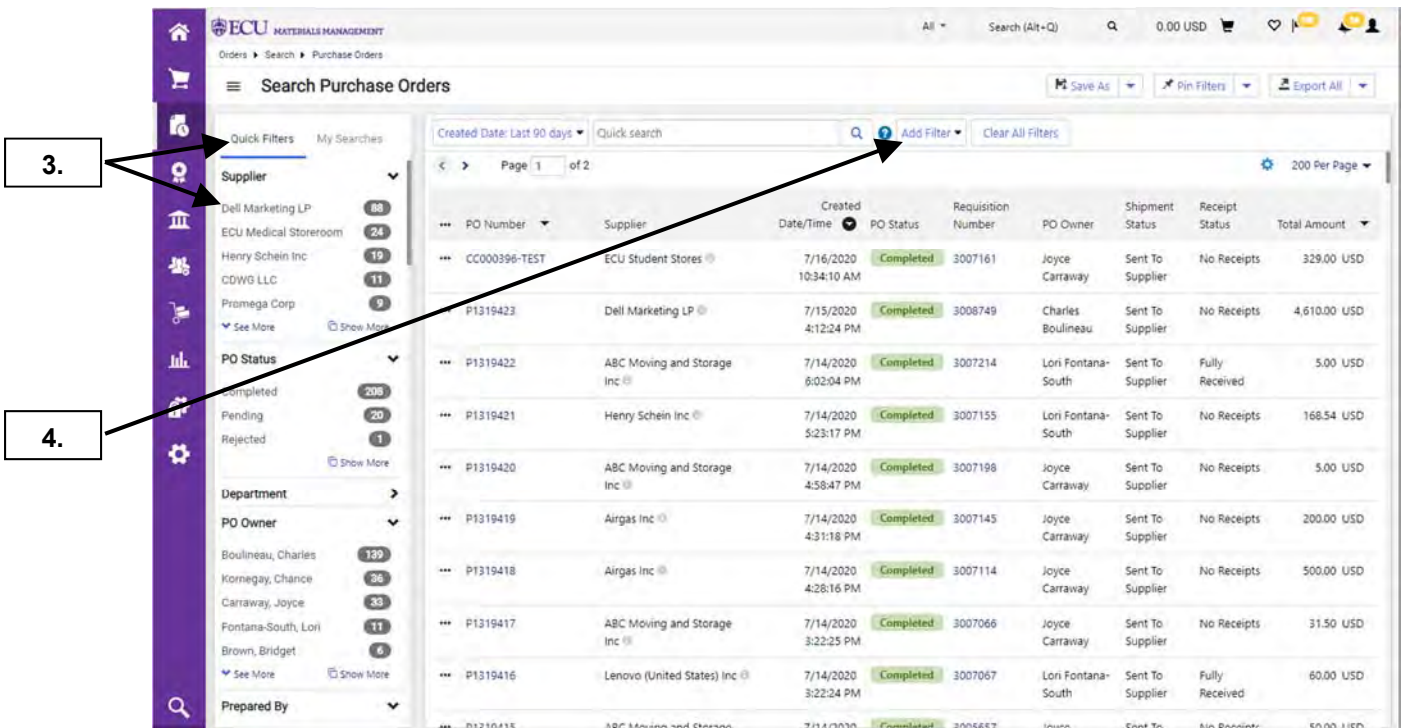
13. Click **Apply**

DOCUMENT SEARCH - USE QUICK FILTERS

Last Updated on: 7/17/2020



1. Hover on **Orders** icon then Search.
2. Select **Purchase Orders**.



3. Refine your search results with **Quick Filters**. Top search results will display and can be selected by clicking the text. Expand the results by clicking Show More. Selecting a value from the Quick Filter list will add the Filter to your current search. For this example, Dell Marketing LP will be selected.
Note: Document visibility is controlled by institutional division.
4. Click **Add Filter** to refine your search.

DOCUMENT SEARCH - USE QUICK FILTERS

Last Updated on: 7/17/2020

The screenshot shows the 'Search Purchase Orders' page. On the left, the 'Quick Filters' sidebar has 'Supplier: Dell Marketing LP' selected. A dropdown menu is open, showing 'Selected Filters' with 'Supplier' checked. The main table displays 88 results for 'Dell Marketing LP'.

PO Number	Supplier	Created Date/Time	PO Status	Created Date/Time	PO Number	Shipment Status	Total Amount
P1319423	Dell Marketing LP	7/15/2020 4:12:24 PM	Completed	7/15/2020 4:12:24 PM	3005406	Sent To Supplier	4,610.00 USD
P1319409	Dell Marketing LP	7/13/2020 10:26:11 AM	Completed	7/13/2020 10:26:11 AM	3005402	Sent To Supplier	4,740.93 USD
P1319407	Dell Marketing LP	7/13/2020 10:18:37 AM	Completed	7/13/2020 10:18:37 AM	3001630	Sent To Supplier	11,200.00 USD
P1319406	Dell Marketing LP	7/13/2020 10:13:06 AM	Completed	7/13/2020 10:13:06 AM	3001600	Sent To Supplier	40,000.00 USD
P1319404	Dell Marketing LP	7/13/2020 10:09:54 AM	Completed	7/13/2020 10:09:54 AM	3001560	Sent To Supplier	5,200.00 USD
P1319402	Dell Marketing LP	7/13/2020 9:56:11 AM	Completed	7/13/2020 9:56:11 AM	3005406	Sent To Supplier	1,489.00 USD
P1319401	Dell Marketing LP	7/13/2020 9:47:19 AM	Completed	7/13/2020 9:47:19 AM	3005402	Sent To Supplier	850.00 USD
P1319386	Dell Marketing LP	7/10/2020 11:28:59 AM	Completed	7/10/2020 11:28:59 AM	2957730	Sent To Supplier	1,700.00 USD
P1319382	Dell Marketing LP	7/9/2020 4:33:55 PM	Completed	7/9/2020 4:33:55 PM	3001630	Sent To Supplier	1,489.00 USD
P1319381	Dell Marketing LP	7/9/2020 3:57:33 PM	Completed	7/9/2020 3:57:33 PM	3001600	Sent To Supplier	2,709.90 USD
P1319380	Dell Marketing LP	7/9/2020 3:34:34 PM	Completed	7/9/2020 3:34:34 PM	3001560	Sent To Supplier	11,200.00 USD
P1319379	Dell Marketing LP	7/9/2020 3:18:32 PM	Completed	7/9/2020 3:18:32 PM	3001550	Sent To Supplier	40,000.00 USD

5. The action of selecting a supplier in the Quick Filter list has added the Supplier Filter to your search.

The screenshot shows the 'Search Purchase Orders' page. The 'Add Filter' button is highlighted. The dropdown menu is open, showing 'Custom Fields' with 'Organization*' checked. The main table displays 88 results for 'Dell Marketing LP'.

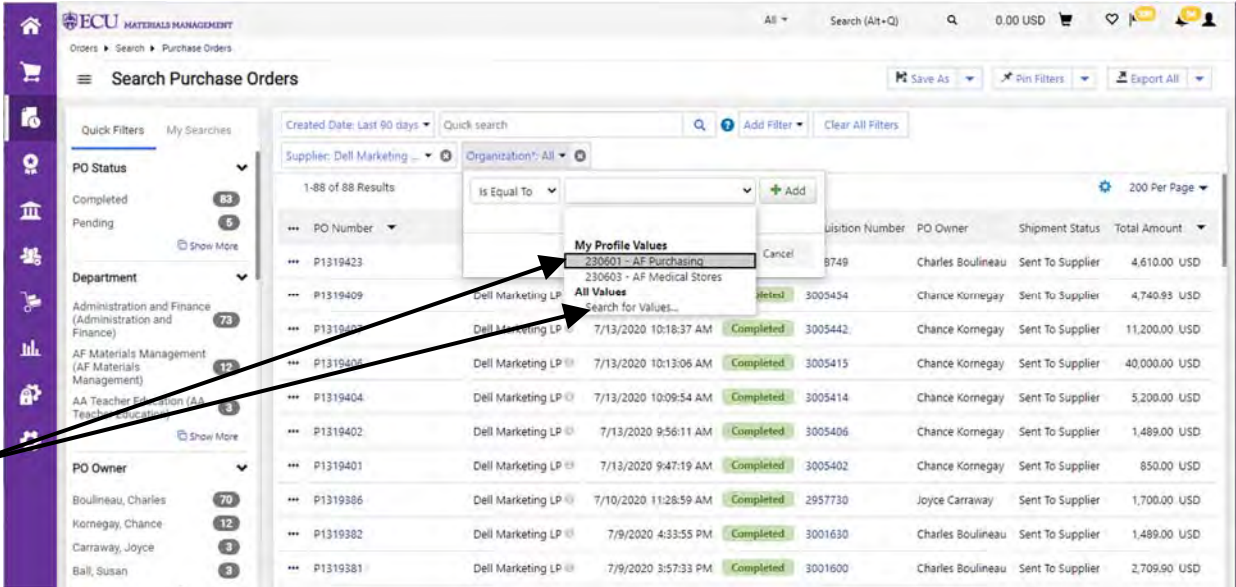
PO Number	Supplier	Created Date/Time	PO Status	Created Date/Time	PO Number	Shipment Status	Total Amount
P1319423	Dell Marketing LP	7/15/2020 4:12:24 PM	Completed	7/15/2020 4:12:24 PM	3005406	Sent To Supplier	4,610.00 USD
P1319409	Dell Marketing LP	7/13/2020 10:26:11 AM	Completed	7/13/2020 10:26:11 AM	3005402	Sent To Supplier	4,740.93 USD
P1319407	Dell Marketing LP	7/13/2020 10:18:37 AM	Completed	7/13/2020 10:18:37 AM	3001630	Sent To Supplier	11,200.00 USD
P1319406	Dell Marketing LP	7/13/2020 10:13:06 AM	Completed	7/13/2020 10:13:06 AM	3001600	Sent To Supplier	40,000.00 USD
P1319404	Dell Marketing LP	7/13/2020 10:09:54 AM	Completed	7/13/2020 10:09:54 AM	3001560	Sent To Supplier	5,200.00 USD
P1319402	Dell Marketing LP	7/13/2020 9:56:11 AM	Completed	7/13/2020 9:56:11 AM	3005406	Sent To Supplier	1,489.00 USD
P1319401	Dell Marketing LP	7/13/2020 9:47:19 AM	Completed	7/13/2020 9:47:19 AM	3005402	Sent To Supplier	850.00 USD
P1319386	Dell Marketing LP	7/10/2020 11:28:59 AM	Completed	7/10/2020 11:28:59 AM	2957730	Sent To Supplier	1,700.00 USD
P1319382	Dell Marketing LP	7/9/2020 4:33:55 PM	Completed	7/9/2020 4:33:55 PM	3001630	Sent To Supplier	1,489.00 USD
P1319381	Dell Marketing LP	7/9/2020 3:57:33 PM	Completed	7/9/2020 3:57:33 PM	3001600	Sent To Supplier	2,709.90 USD
P1319380	Dell Marketing LP	7/9/2020 3:34:34 PM	Completed	7/9/2020 3:34:34 PM	3001560	Sent To Supplier	11,200.00 USD

6. Scroll down the Filter options list to find the appropriate filter.

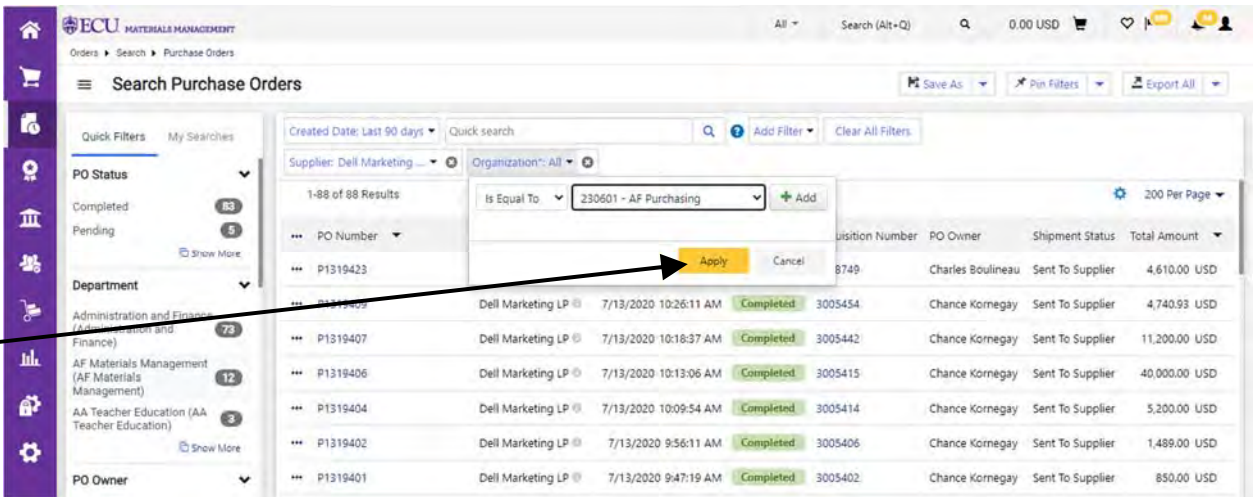
7. For this example, check the box for **Organization**.

DOCUMENT SEARCH - USE QUICK FILTERS

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8. Select a value from your profile or search from all values.



9. Click Apply to define the Filter parameter.

DOCUMENT SEARCH - USE QUICK FILTERS

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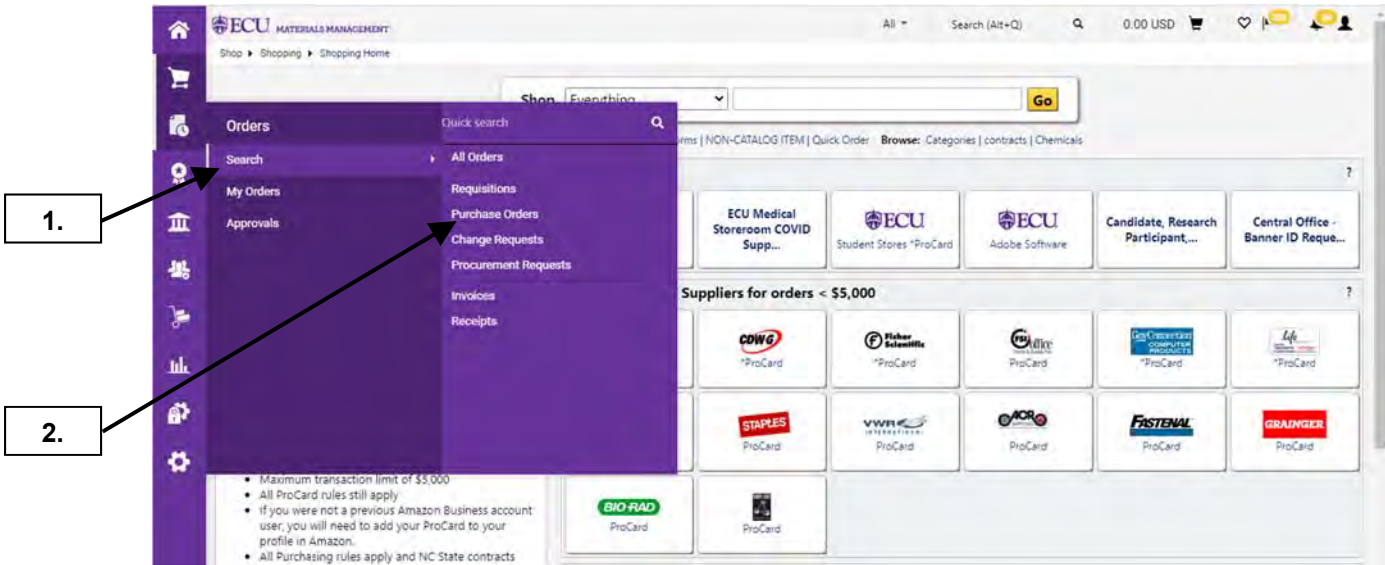
10.

PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Receipt Status	Total Amount
P1319409	Dell Marketing LP	7/13/2020 10:26:11 AM	Completed	3005454	Chance Kornegay	Sent To Supplier	Fully Received	4,740.93 USD
P1319407	Dell Marketing LP	7/13/2020 10:18:37 AM	Completed	3005442	Chance Kornegay	Sent To Supplier	Fully Received	11,200.00 USD
P1319406	Dell Marketing LP	7/13/2020 10:13:06 AM	Completed	3005415	Chance Kornegay	Sent To Supplier	Fully Received	40,000.00 USD
P1319404	Dell Marketing LP	7/13/2020 10:09:54 AM	Completed	3005414	Chance Kornegay	Sent To Supplier	Fully Received	5,200.00 USD
P1319402	Dell Marketing LP	7/13/2020 9:56:11 AM	Completed	3005406	Chance Kornegay	Sent To Supplier	Fully Received	1,489.00 USD
P1319386	Dell Marketing LP	7/10/2020 11:28:59 AM	Completed	2957730	Joyce Carraway	Sent To Supplier	No Receipts	1,700.00 USD

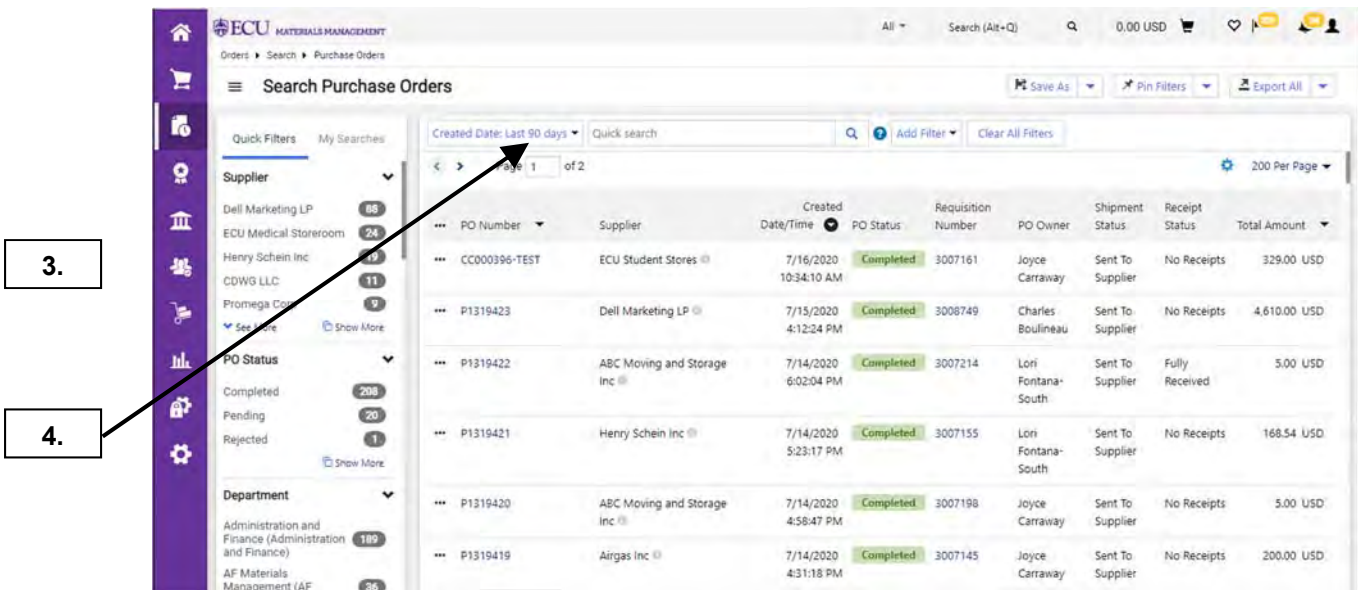
10. Click the **Pin Filters** option to pin your selected filters so that they become your default filters each time you return to the search.

ENHANCED DOCUMENT SEARCH OPTIONS

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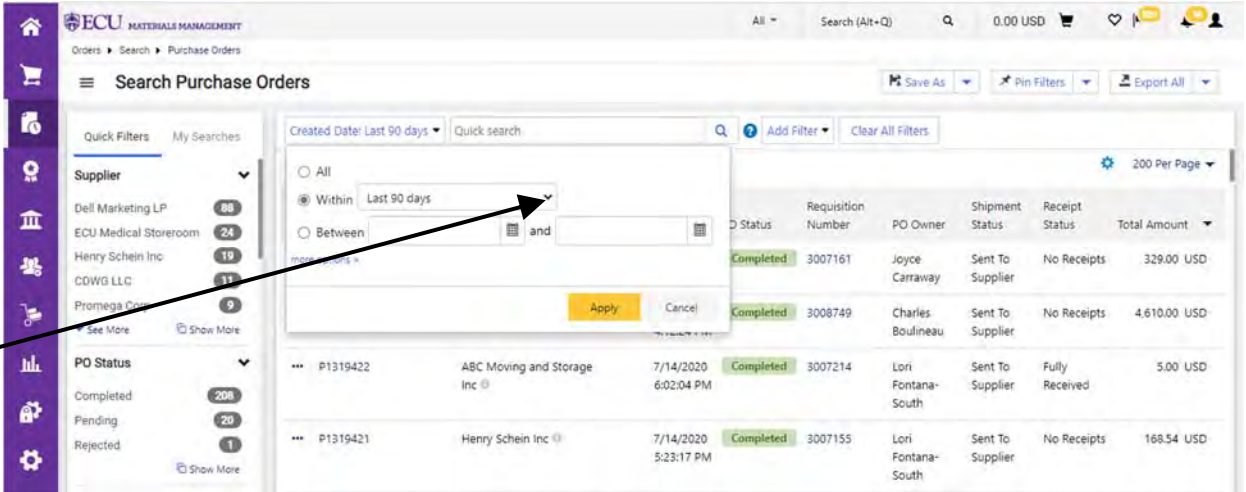
1. Hover on the **Orders** icon.
2. Hover on **Search** then select the **Purchase Orders** link.
Note: Elastic search procedures can be performed for **Requisitions, Purchase Orders, E-Invoices, and Receipts**.



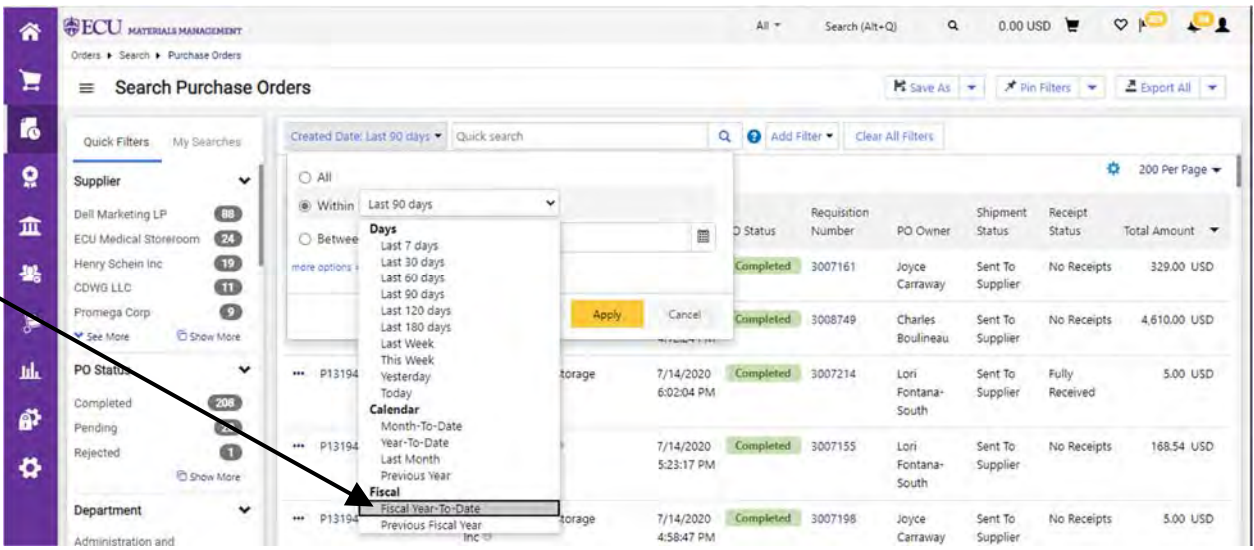
3. Notice options to search by **Date**, specific document number in **Quick Search**, and **Add Filters**. By default, all your purchase orders created in the last 90 days are displayed.
4. Click the dropdown to modify the date range.

ENHANCED DOCUMENT SEARCH OPTIONS

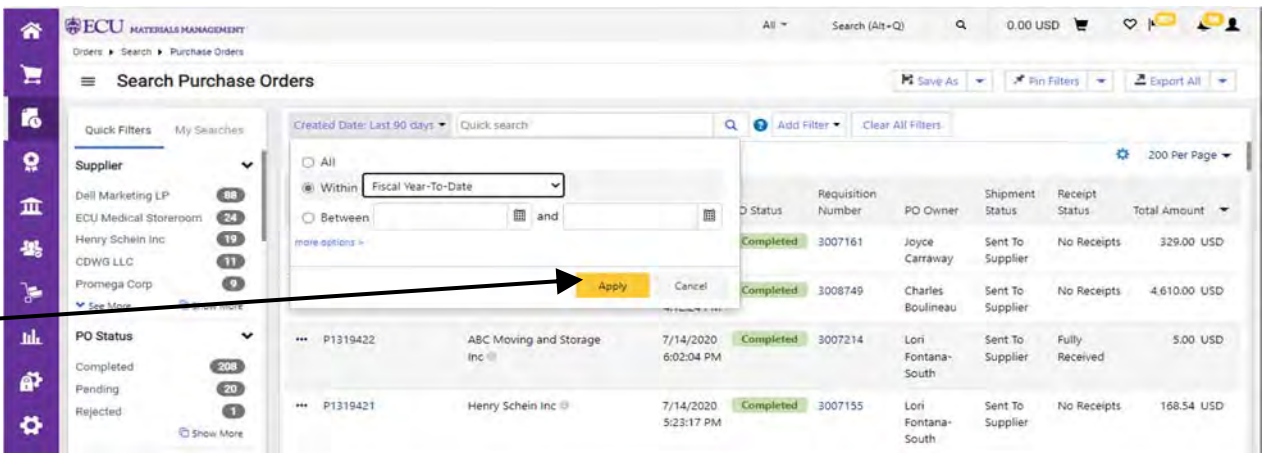
Last Updated on: 7/17/2020



5. Click to dropdown to select a specific date range.



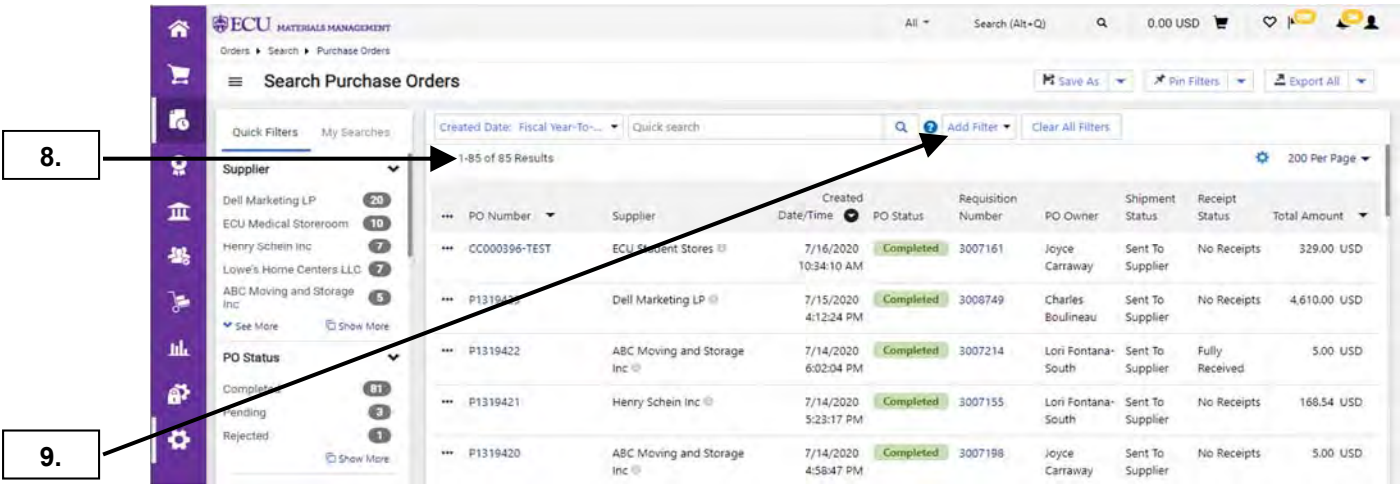
6. Select **Fiscal Year-To-Date**.



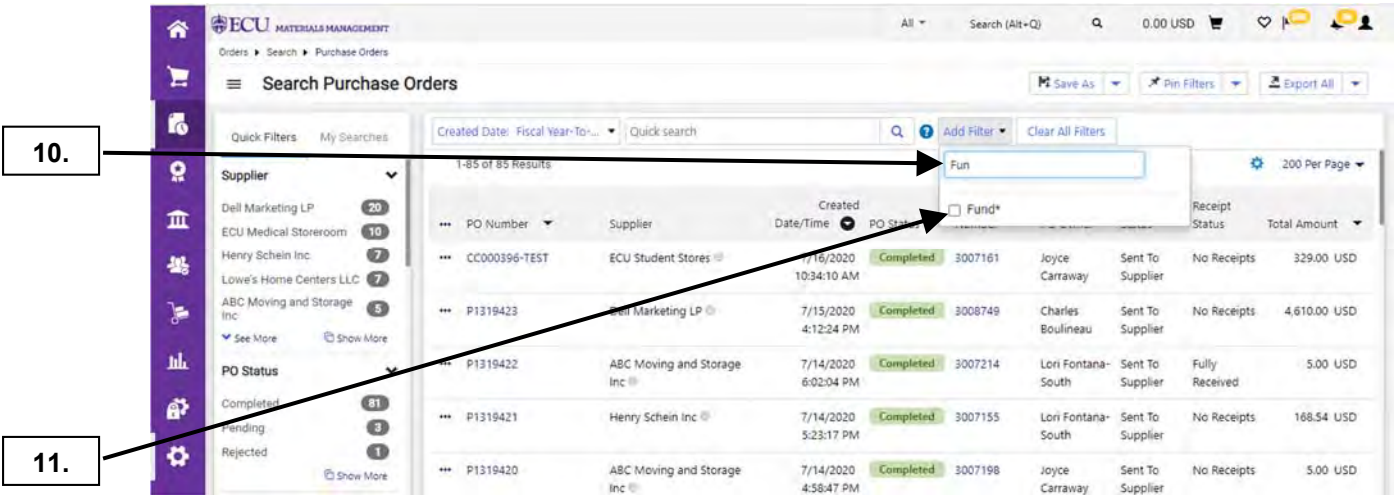
7. Click **Apply** to set this search parameter.

ENHANCED DOCUMENT SEARCH OPTIONS

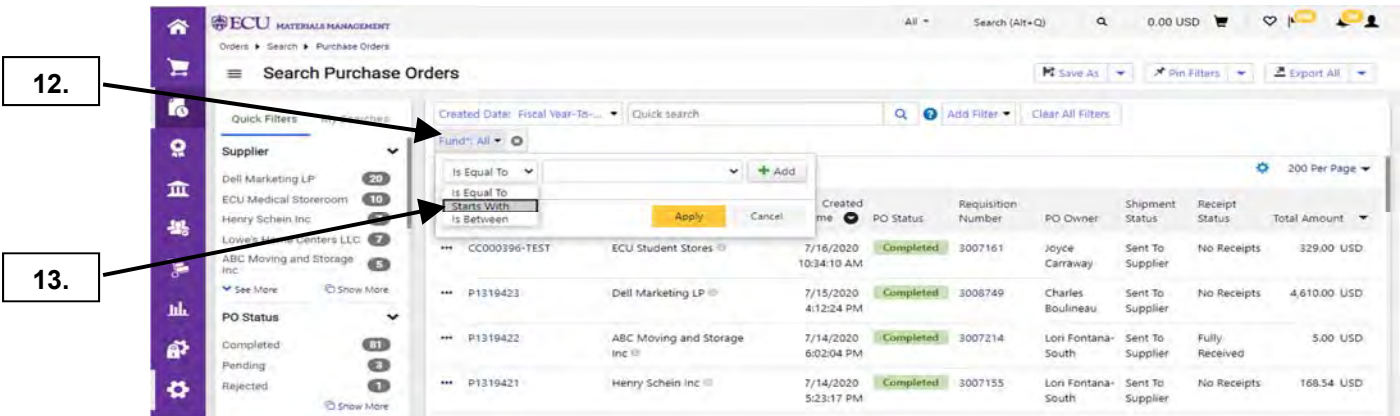
Last Updated on: 7/17/2020



- 8. Note to results. Your search has been narrowed to the date range.
- 9. Click on **Add Filter** to further refine your search.



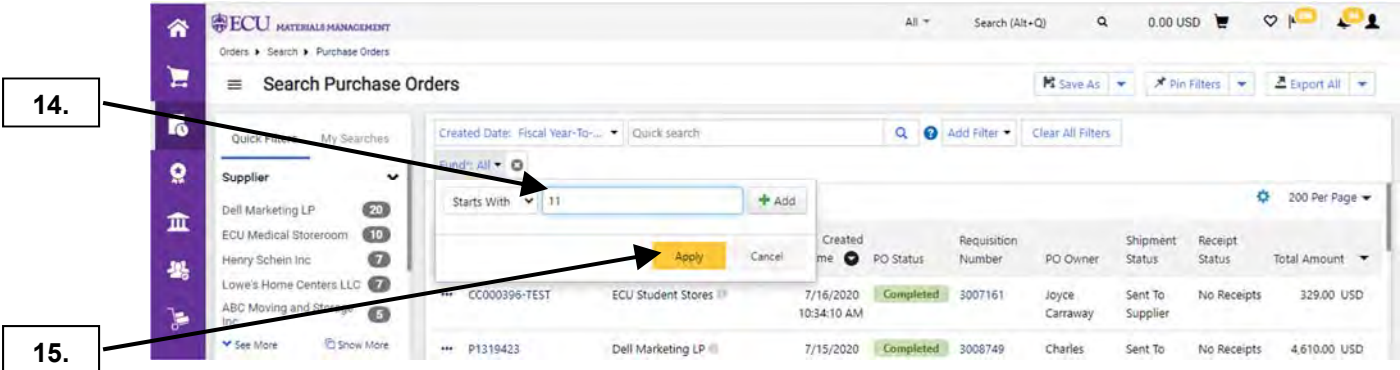
- 10. Scroll or begin to type the field name to select all appropriate fields.
- 11. Check the box to add the filter to your search.



- 12. Note the Fund field has been added to your search parameters.
- 13. Click the dropdown to select **Starts With**.

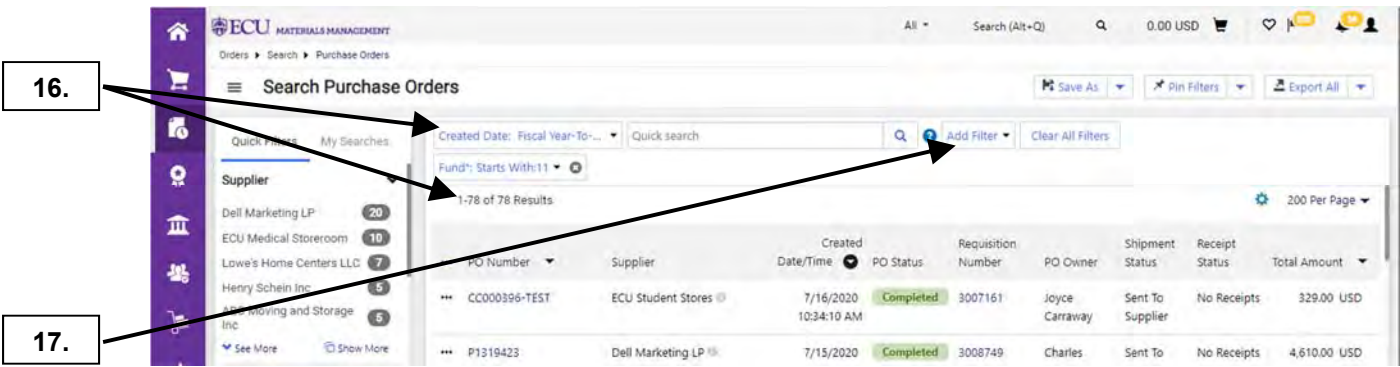
ENHANCED DOCUMENT SEARCH OPTIONS

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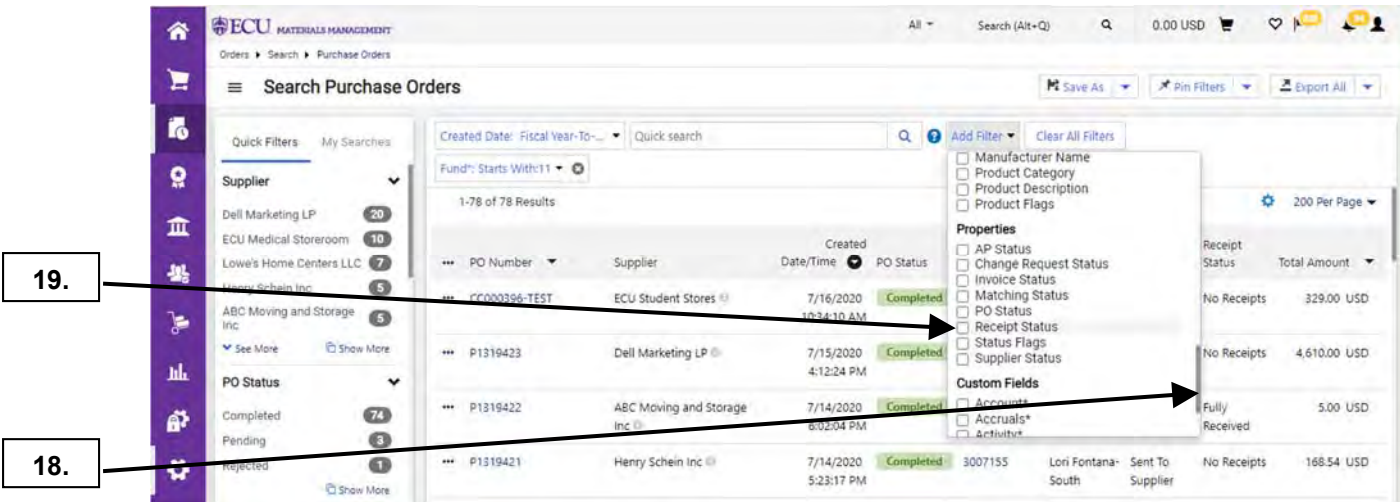
14. Selecting **Funds** that start with **11** will narrow your search to only State Funds. Type **11** or any appropriate Fund number.

15. Click **Add** to add additional Funds or **Click Apply** for this parameter.



16. Your search has been refined by Date and Fund fields. Note the results.

17. Click **Add Filter** to refine your search by Receipt Status.

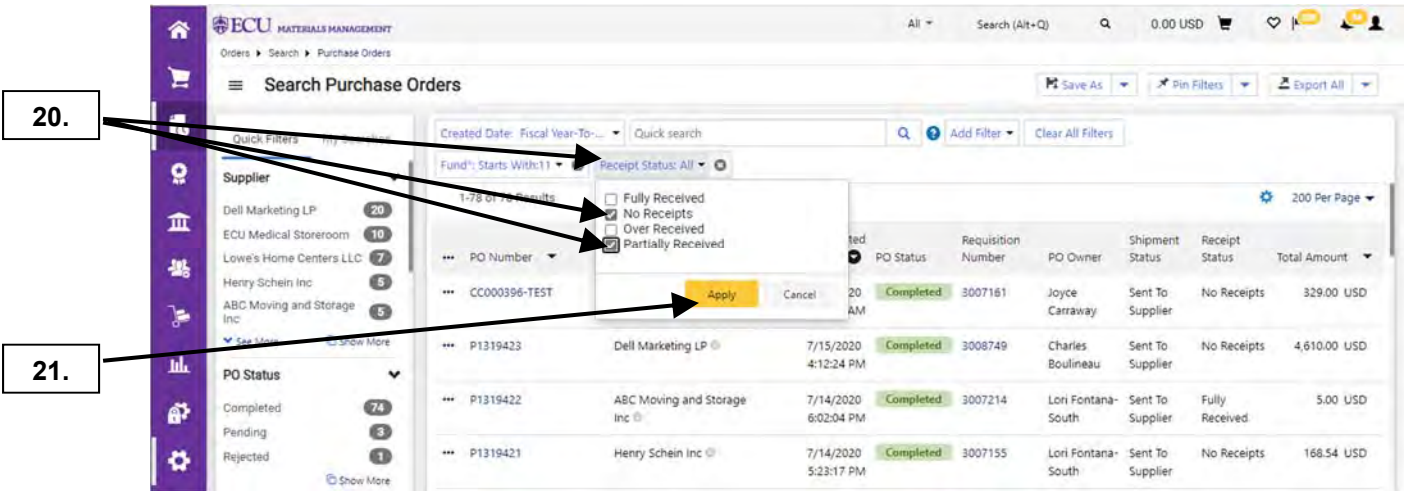


18. Scroll to find **Receipt Status**.

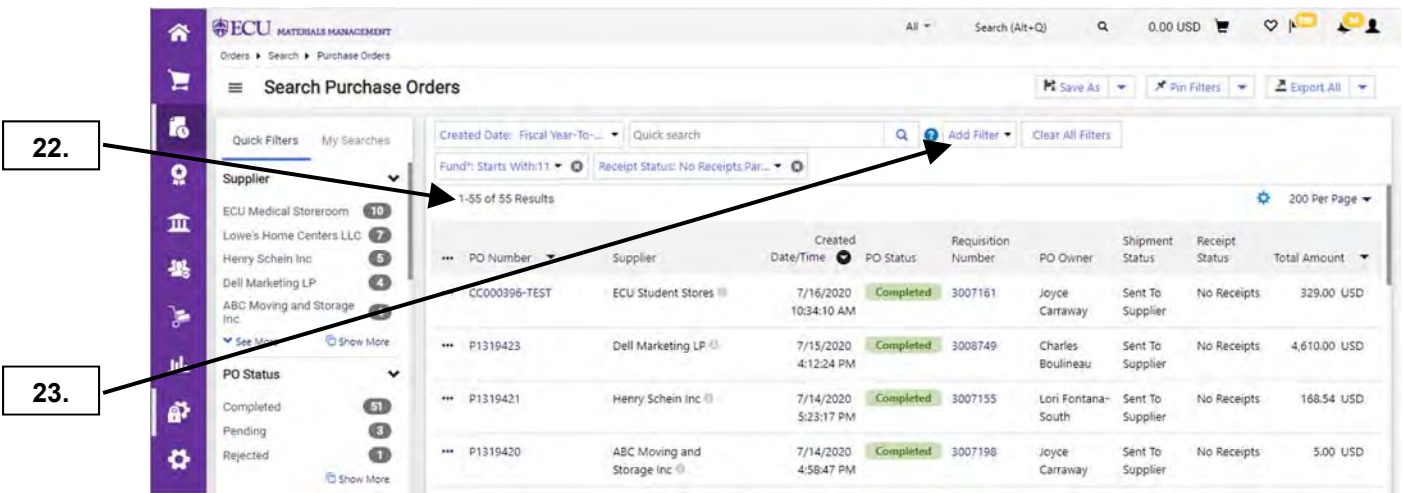
19. Click the **Check Box** to select this field.

ENHANCED DOCUMENT SEARCH OPTIONS

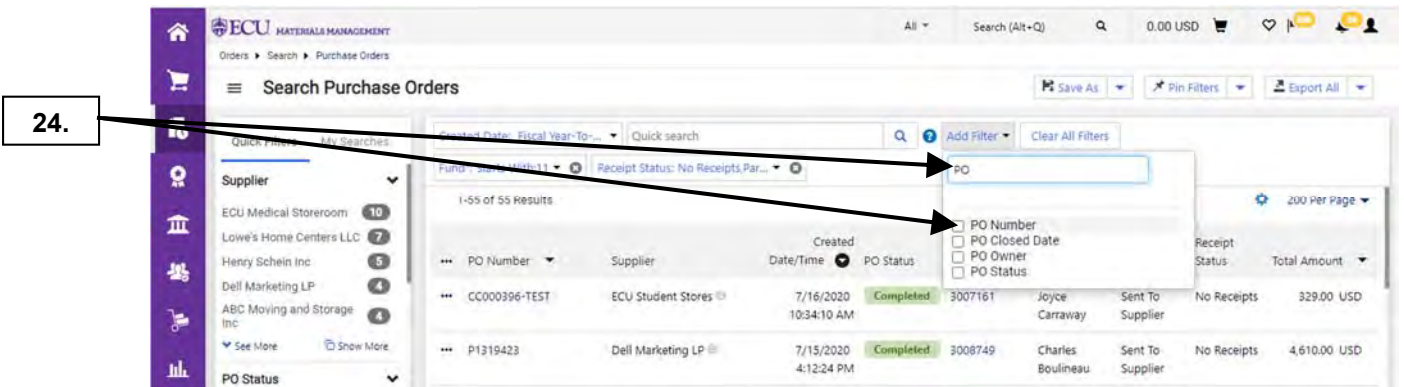
Last Updated on: 7/17/2020



- 20. Click the dropdown to select all appropriate **Receipt Status** types. Select **No Receipts** and **Partially Received**. These parameters will narrow your search to include only those purchase orders requiring receipts.
- 21. Click **Apply**.



- 22. Note your refined **Results** due to adding Receipt Status.
- 23. Select **Add Filter** to add **PO Number** to your search parameters.



- 24. Click the **Check Box** to add **PO Number**.

ENHANCED DOCUMENT SEARCH OPTIONS

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The screenshot shows the 'Search Purchase Orders' interface. On the left, there are 'Quick Filters' for Supplier and PO Status. The main search area includes filters for 'Fund*', 'Receipt Status', and 'PO Number'. A dropdown menu for 'PO Number' is open, showing a search input with 'P' and an 'Apply' button. Callout 25 points to the dropdown menu, and callout 26 points to the 'Apply' button.

25. Refine the **PO Number** field by entering a value.

26. Type “P” to refine your search to purchase orders beginning with the letter “P” only and click **Apply**.

Note: Only purchase orders beginning with “P” require receipts. Purchase Orders beginning with “EC” or “CC” will not require receiving.

The screenshot shows the search results after applying filters. The 'PO Number' filter is set to 'P'. The results table shows 32 results. Callout 27 points to the '1-32 of 32 Results' text, and callout 28 points to the 'PO Number' column in the table.

PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Receipt Status	Total Amount
P1319423	Dell Marketing LP	7/15/2020 4:12:24 PM	Completed	3008749	Charles Boulineau	Sent To Supplier	No Receipts	4,610.00 USD
P1319421	Henry Schein Inc	7/14/2020 5:23:17 PM	Completed	3007155	Lori Fontana-South	Sent To Supplier	No Receipts	168.54 USD
P1319420	ABC Moving and Storage Inc	7/14/2020 4:58:47 PM	Completed	3007198	Joyce Carraway	Sent To Supplier	No Receipts	5.00 USD
P1319419	Airgas Inc	7/14/2020 4:31:18 PM	Completed	3007145	Joyce Carraway	Sent To Supplier	No Receipts	200.00 USD

27. Note the Results of your from adding the Filters.

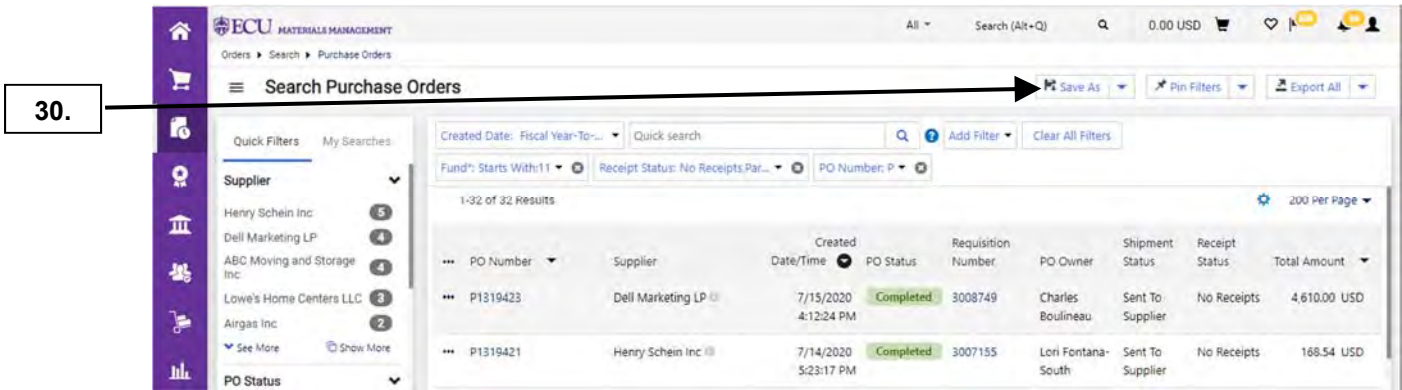
28. You can open the purchase orders by Clicking the PO number.

The screenshot shows the search results with the 'Action' icon highlighted for a specific PO number. Callout 29 points to the 'Action' icon.

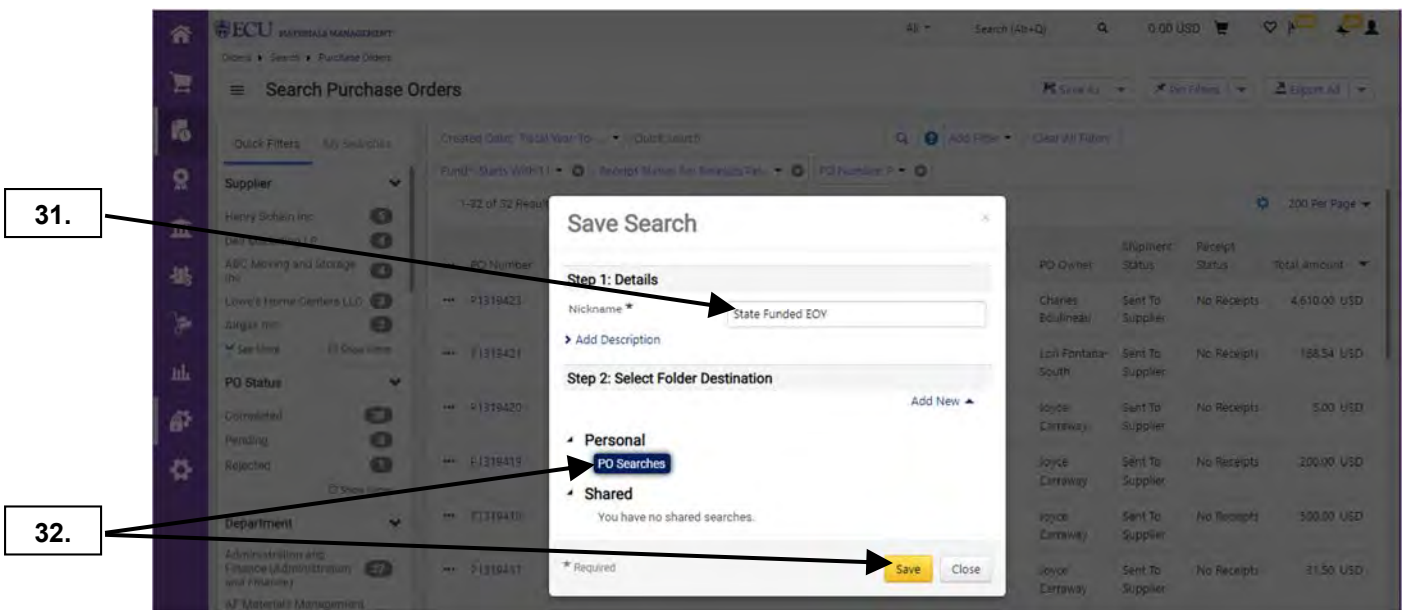
29. You can **take action** directly from the search by choosing an option from the **Action** icon.

ENHANCED DOCUMENT SEARCH OPTIONS

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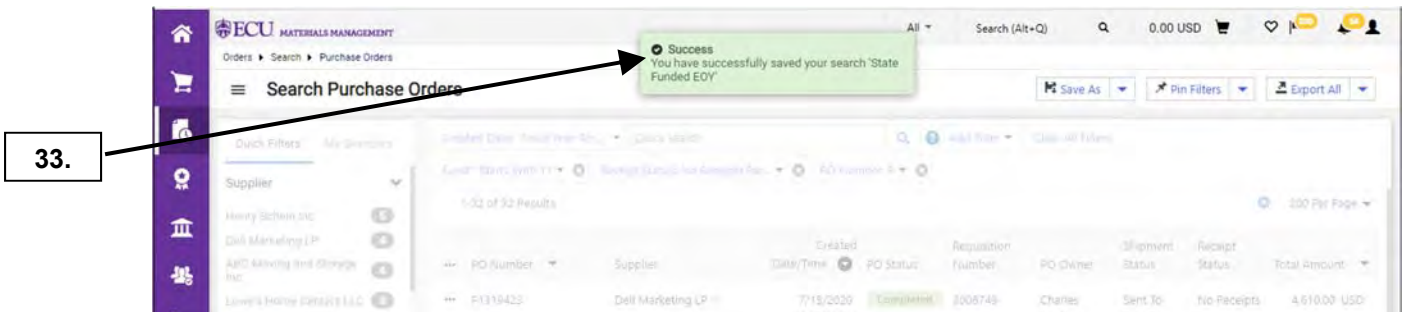
30. Click **Save As** to save the added Filters for quick access.



31. Complete the Nickname field with a relevant title for your saved search.

32. Select a folder to record your saved search then click the Save button.

Note: Click Add New to create a folder destination.



33. A **Success** message will display once the new saved search has been recorded.

ENHANCED DOCUMENT SEARCH OPTIONS

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34. To recall your saved search, click on My Searches

35. Click on the desired saved search to execute a search with the pre-saved filters.

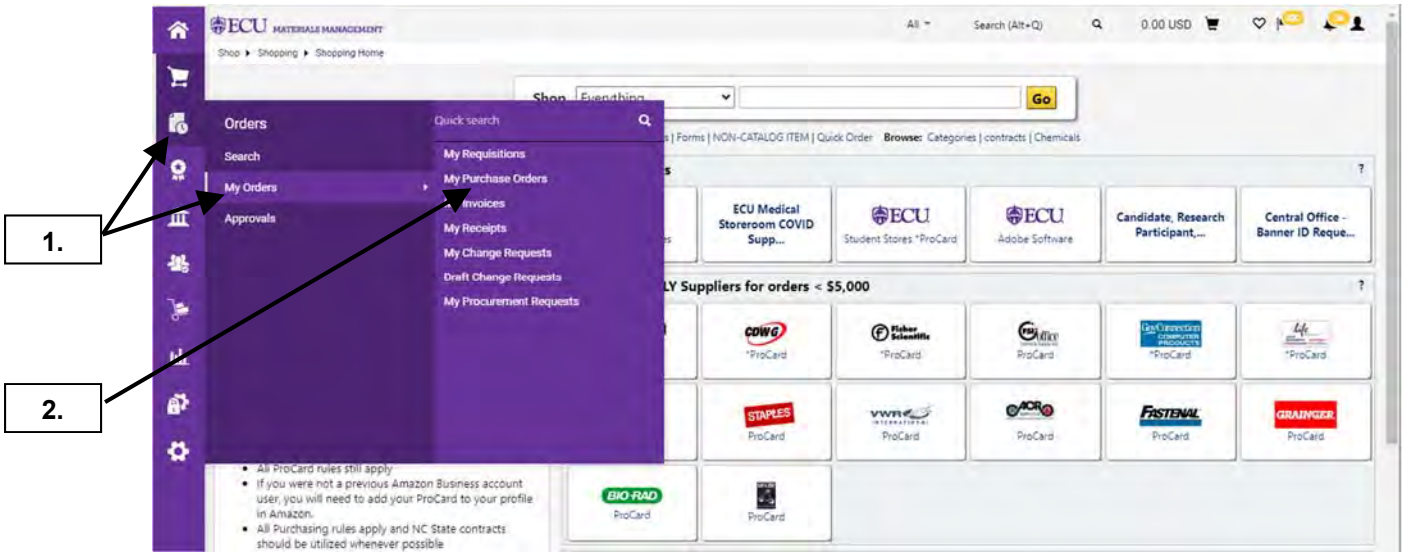
36. The filters saved in your Favorite Searches will not have to be selected manually and can be executed from the My Searches menu anytime.

Note: See the total Results

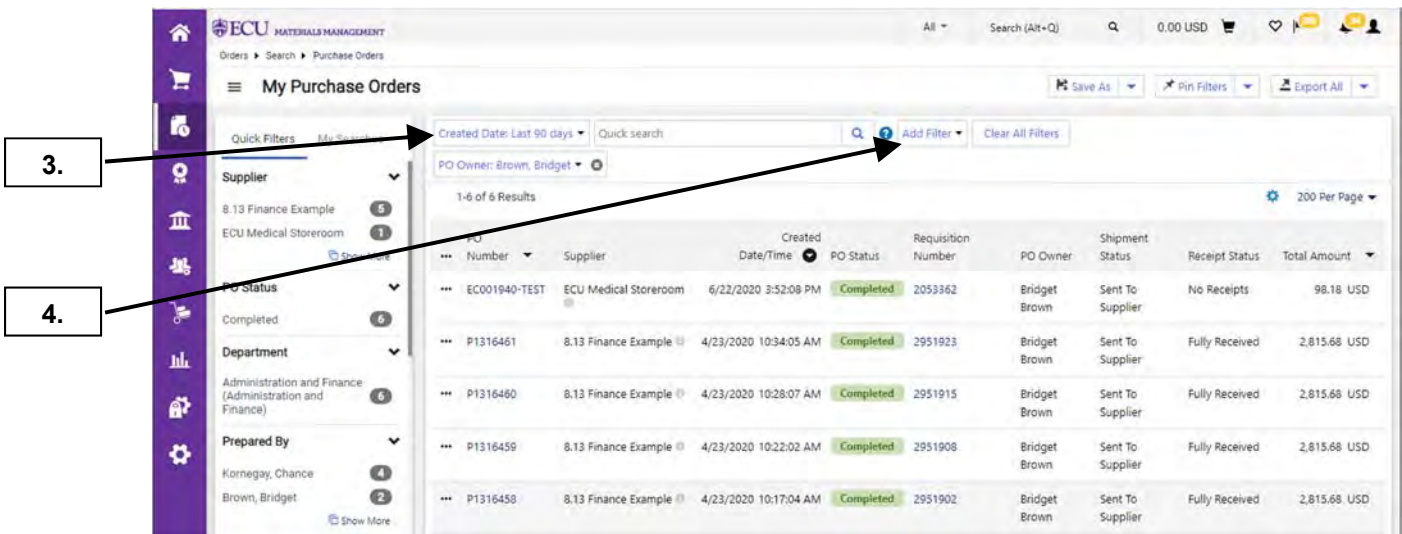
37. This completes the procedure for Enhanced Document Search.

MY PURCHASE ORDERS

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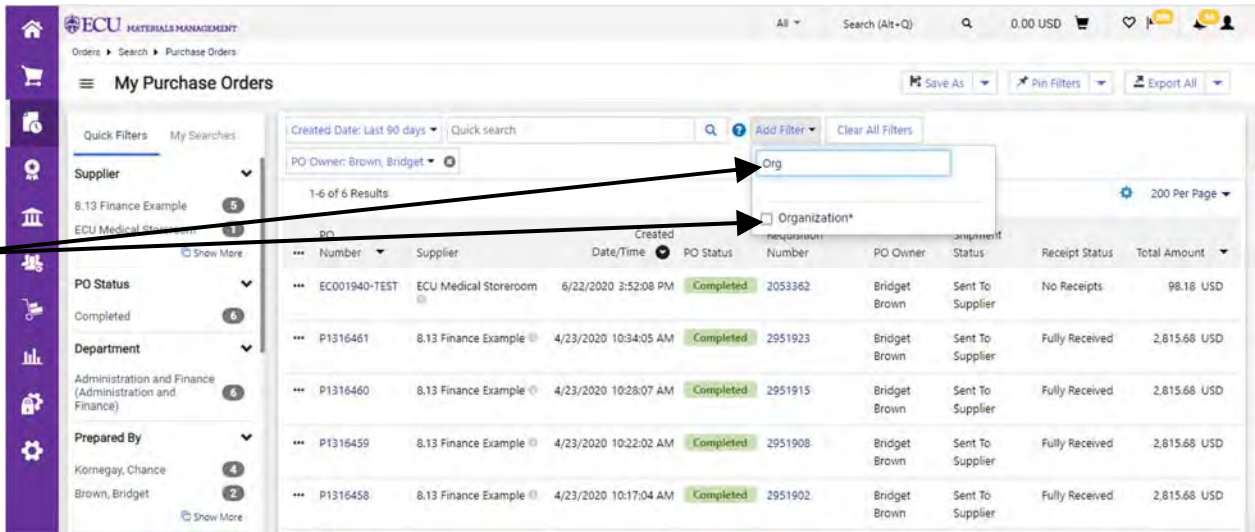
1. Hover on **Orders** icon then My Orders.
2. Select **My Purchase Orders**.



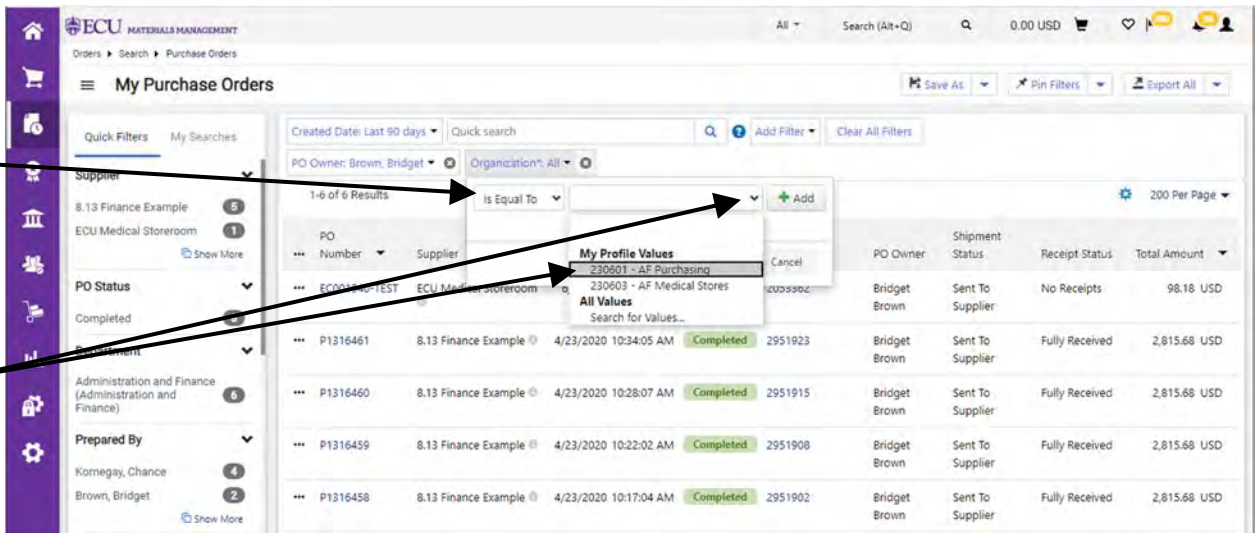
3. The **My Purchase Order** option will display purchase orders created in the last 90 days, prepared by the active user.
4. Click **Add Filter** to refine your search.

MY PURCHASE ORDERS

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5. Begin typing **Organization** and click the **Check Box** for **Organization** to refine your search to a specific Organization number.



6. Select from the **Is Equal To** option. The dropdown will allow you to select preset values from your profile or search from all available values.

7. Select a value and Click **Apply**.

MY PURCHASE ORDERS

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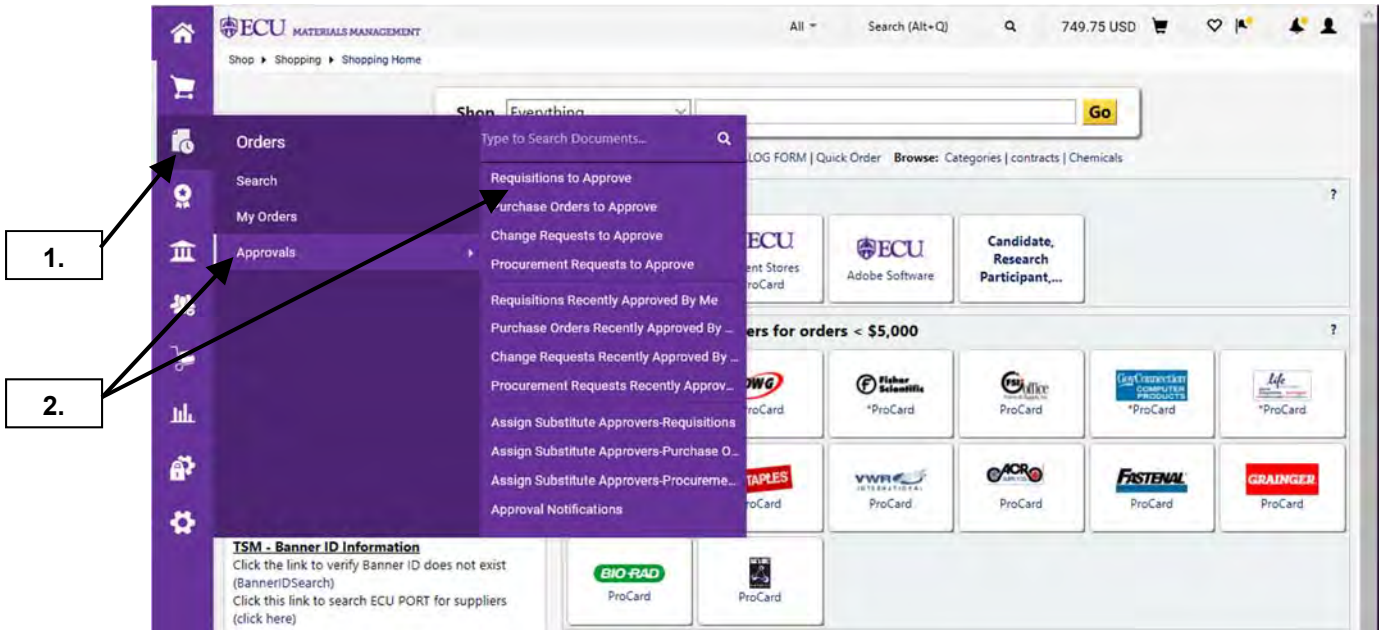
8.

PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Receipt Status	Total Amount
EC001940-TEST	ECU Medical Storeroom	6/22/2020 3:52:08 PM	Completed	2053362	Bridget Brown	Sent To Supplier	No Receipts	98.18 USD
P1316461	8.13 Finance Example	4/23/2020 10:34:05 AM	Completed	2951923	Bridget Brown	Sent To Supplier	Fully Received	2,815.68 USD
P1316460	8.13 Finance Example	4/23/2020 10:28:07 AM	Completed	2951915	Bridget Brown	Sent To Supplier	Fully Received	2,815.68 USD
P1316459	8.13 Finance Example	4/23/2020 10:22:02 AM	Completed	2951908	Bridget Brown	Sent To Supplier	Fully Received	2,815.68 USD
P1316458	8.13 Finance Example	4/23/2020 10:17:04 AM	Completed	2951902	Bridget Brown	Sent To Supplier	Fully Received	2,815.68 USD

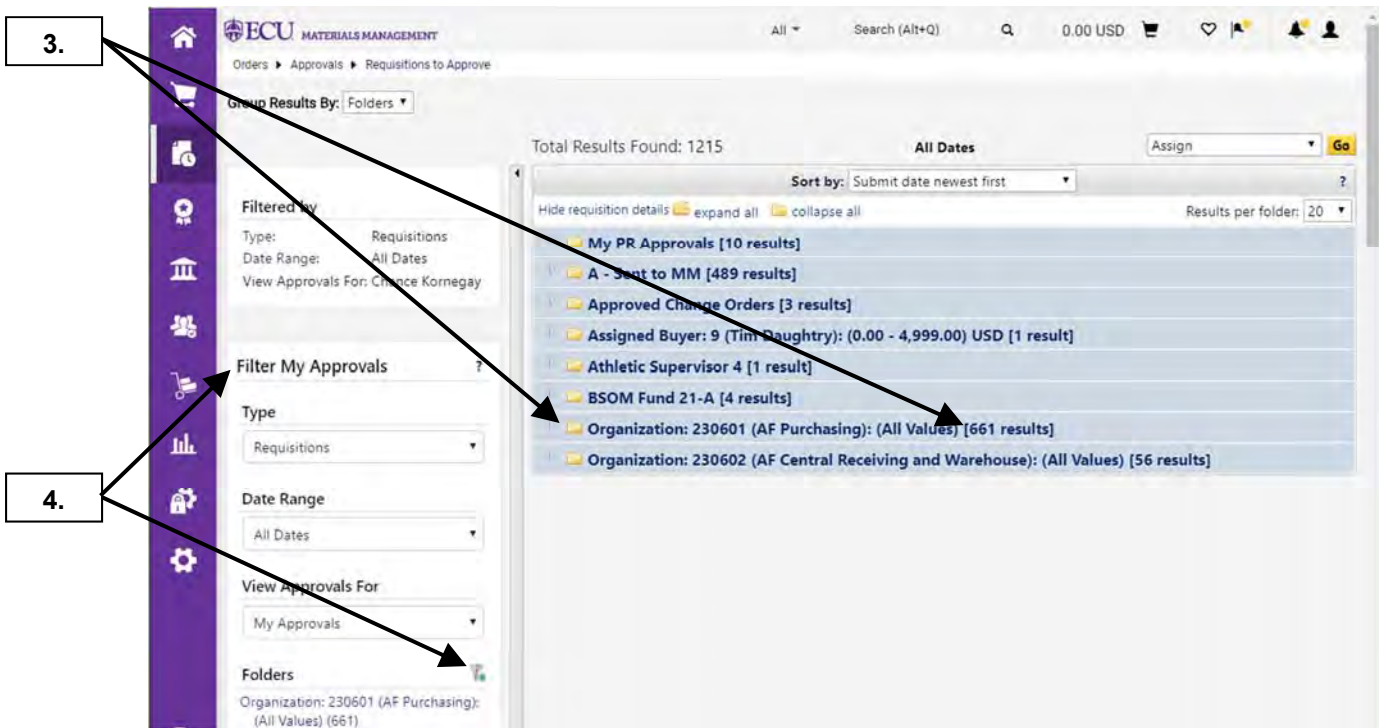
8. Note the results and repeat **Step 4** to add additional search parameters.
9. This completes the steps for the procedure.

APPROVALS

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1. Hover on the **Orders** icon.
2. Hover on **Approvals** then select the appropriate approval document link. For demonstration, the **Requisitions to Approve** link will be selected.



3. Approval folders with documents pending approval will display according to departmental assignments. Click on the appropriate folder.
4. Filters are available for refining your searches in your approval queues: **Date, Priority, Supplier, Prepared by, Form Type, Custom Fields, Current Workflow Step, State, Department, Assigned Approver, Prepared For, and Status Flags**. This will require scrolling to see remaining filters.

APPROVALS

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5. Note details that are available for each document: **Requisition No., Suppliers, Assigned Approver, PR Date/Time, Requisitioner, Amount, Requisition Name, No of line items, & Folders.**

6. Notice the paper clip icon for attachments and the red exclamation icon to indicate **Urgent** priority. **Note:** If you do not need to review the requisition before assigning it to yourself, skip to **step 12.**

7. Click on the requisition #. **Note:** Before assigning a requisition for approval, it is recommended that you review the document first to ensure that you have time to complete the approval. You cannot make any changes to the requisition while you are reviewing it.

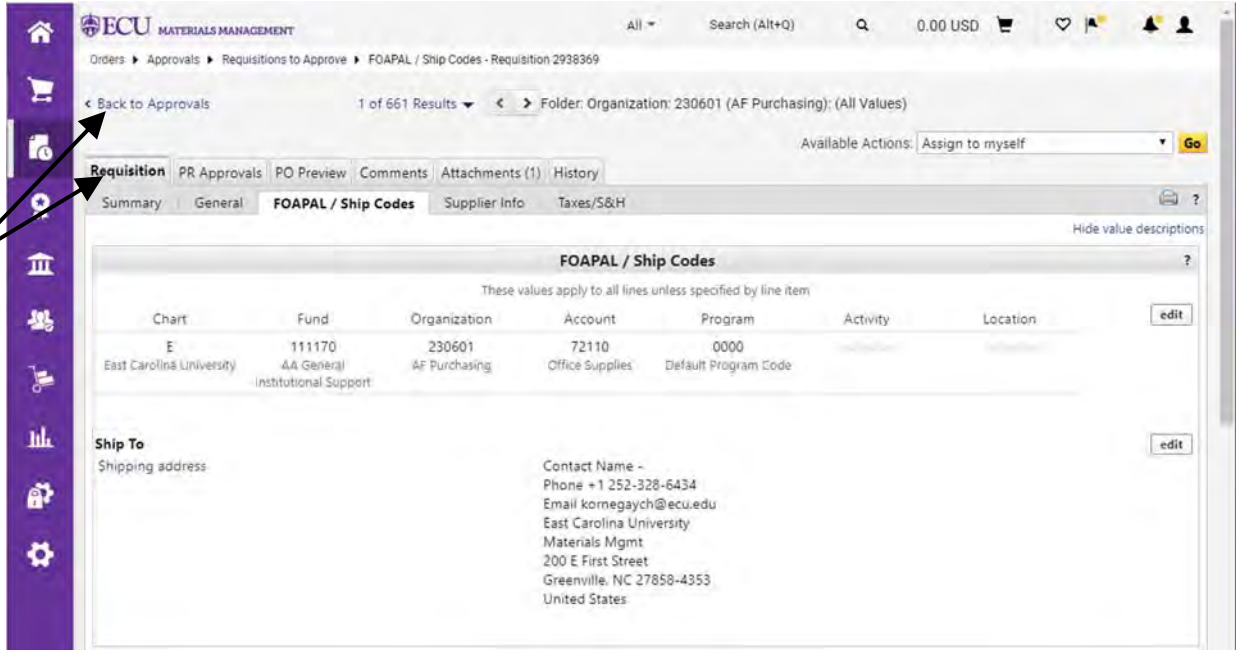
8. Navigation of the Organization Approval folder is available for requisitions pending approval.

9. **The Summary Tab** displays the document header information.

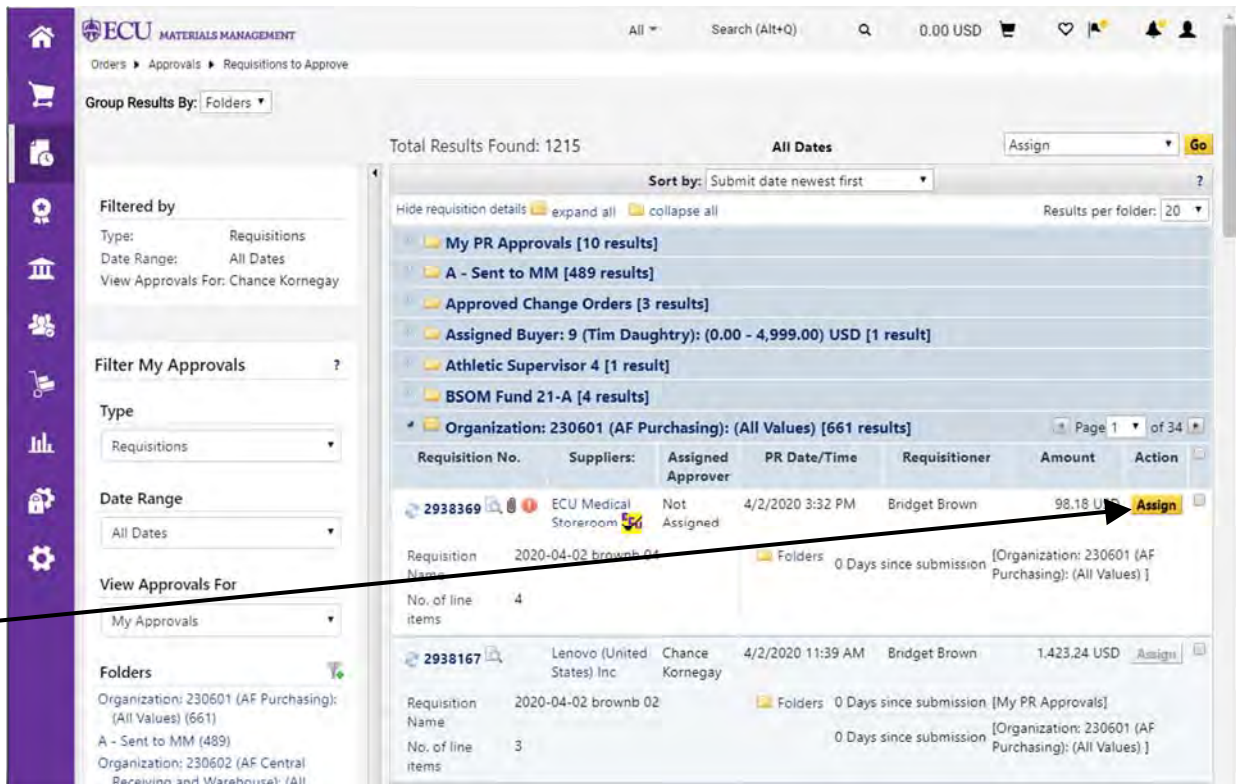
10. Click on **FOAPAL / Ship Codes** tab to view line item details of requisition.

APPROVALS

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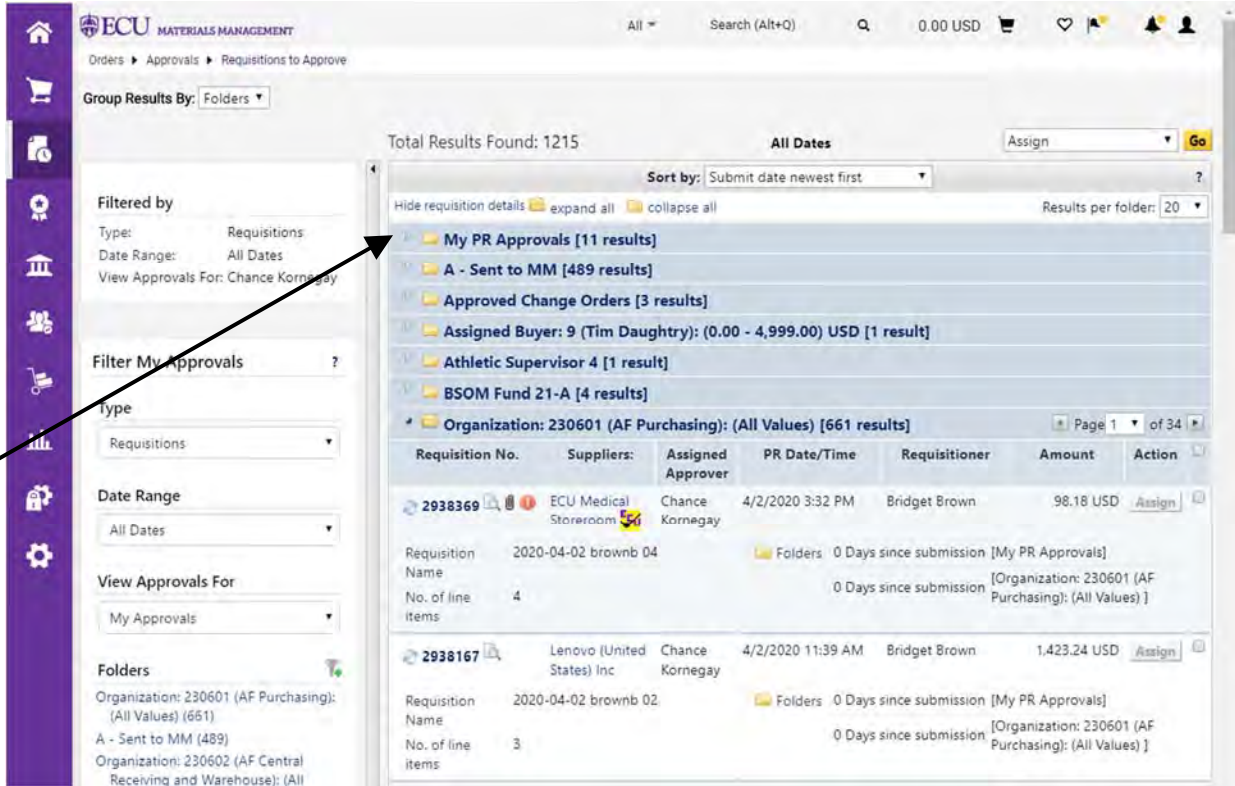
11. Scroll down to page to view the all line item details, click on the **Requisition** tab or **Back to Approvals**.



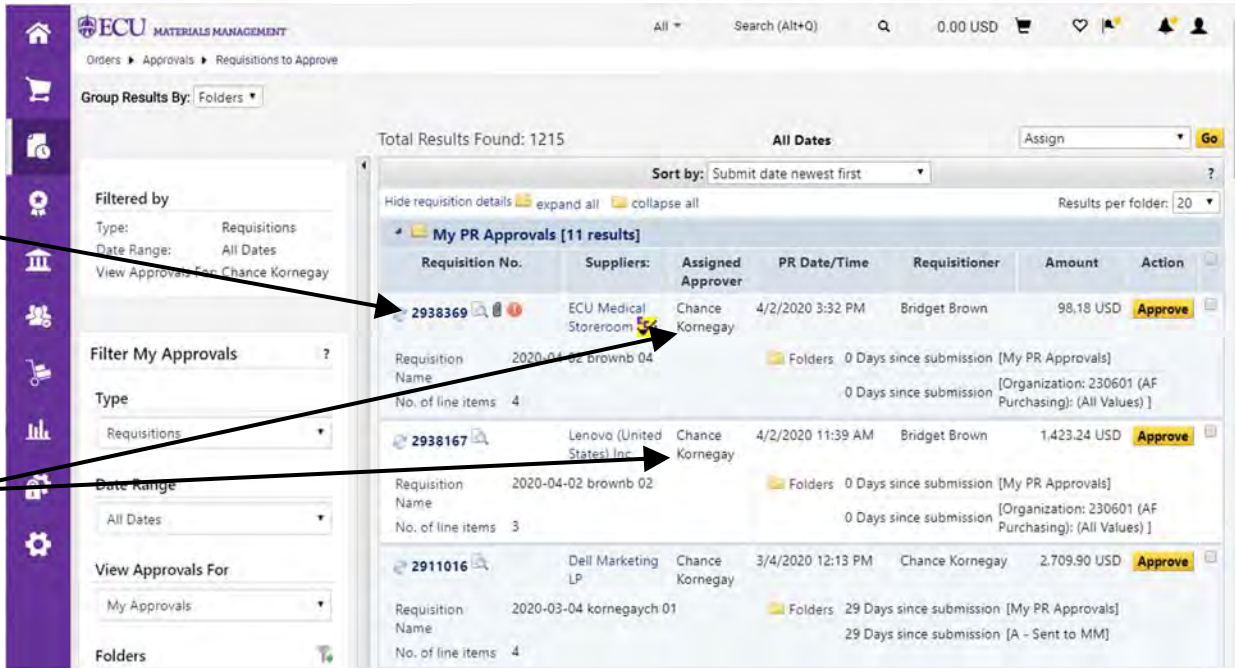
12. Click on **Assign** button that corresponds with requisition you need to approve.

APPROVALS

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13. Click on **My PR Approvals** folder.

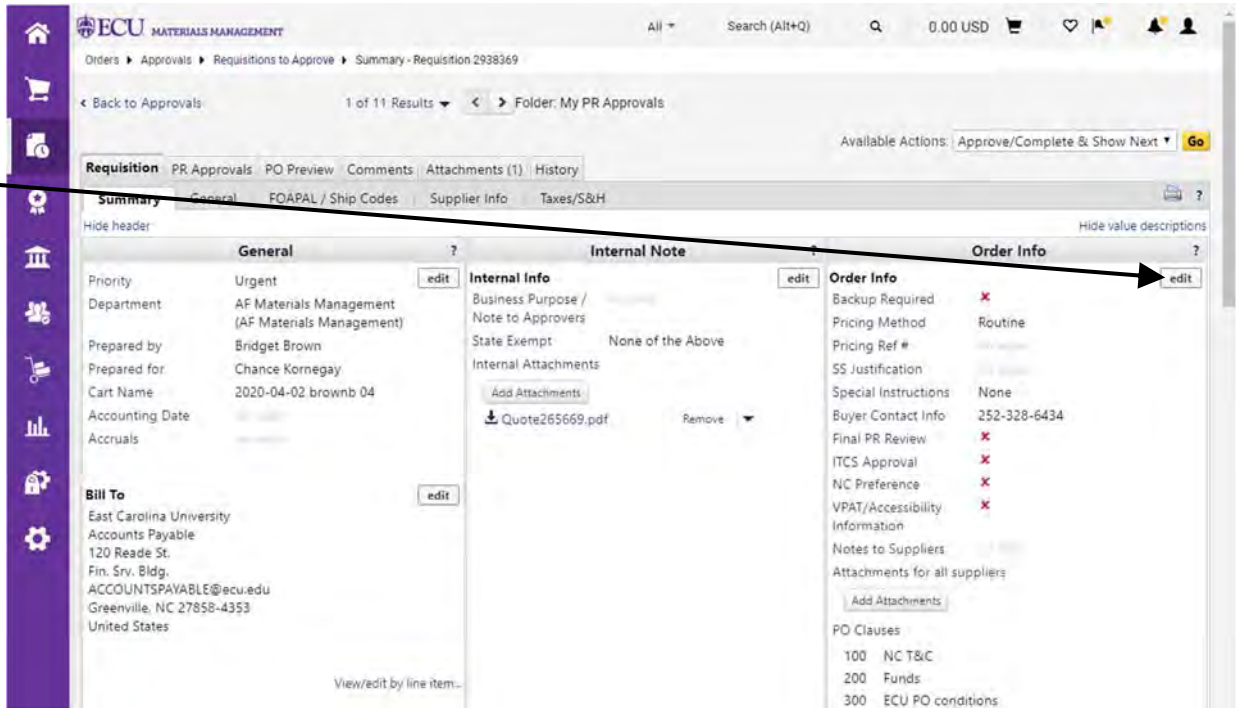


14. The requisition is now assigned to you. **Note:** Other approvers for this Organization folder cannot approve or modify the requisition while you have it assigned to yourself.

15. Click on requisition #.

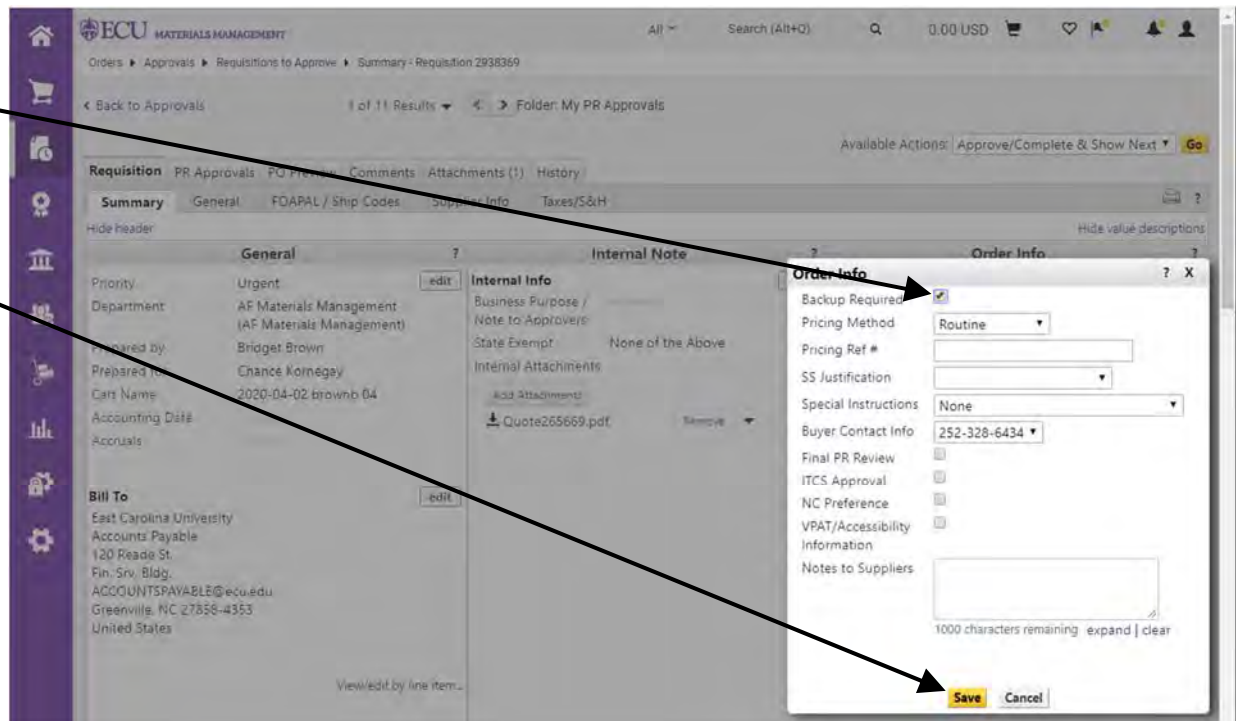
APPROVALS

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16.

16. Now you can make appropriate edits to requisition. Click on **edit** button under **Order Info** section.



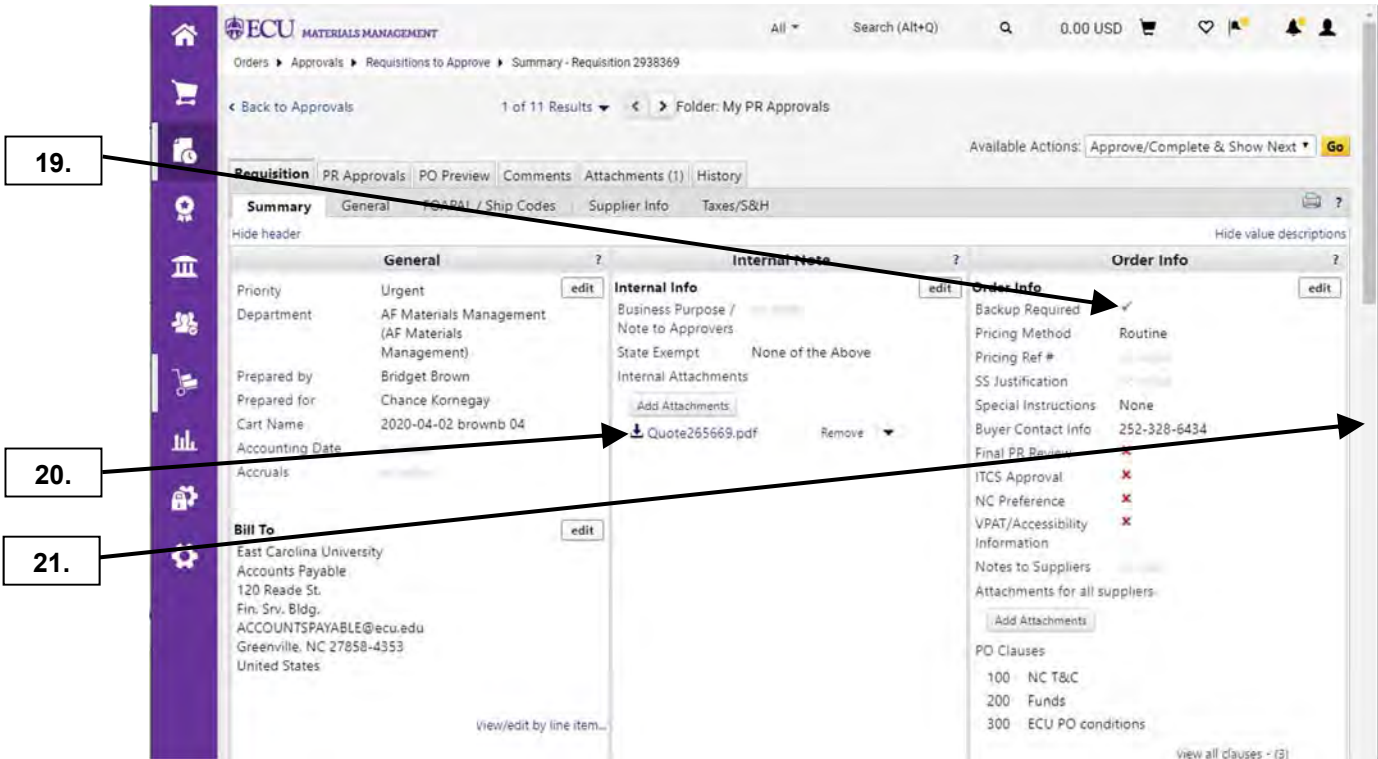
17.

18.

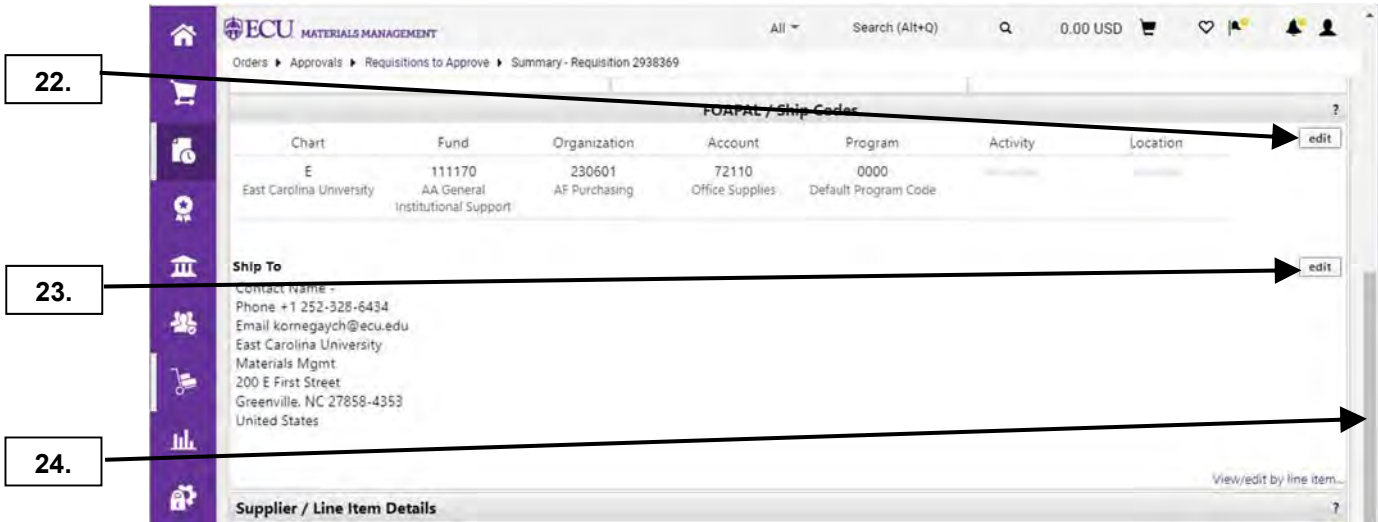
17. In this example, we will select **Backup Required** check box.
18. Click **Save** button to keep changes.

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- 19. Notice the change was updated.
- 20. To open an attachment, click on document name link.
- 21. Scroll down the requisition for Header level edits.



- 22. If necessary, click FOAPAL **edit** button which will allow changes to FOAPAL string for every line item. See Review Cart Header procedure, steps 17 – 29.
- 23. If necessary, click Ship Code **edit** button which will allow changes to shipping information for every line item. See Review Cart Header procedure, steps 31 – 43.
- 24. Scroll back to the Header and click on **FOAPAL / Ship Codes** tab to make changes at line item level.

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The screenshot shows the 'FOAPAL / Ship Codes' section of the ECU Materials Management system. The breadcrumb trail is 'Orders > Approvals > Requisitions to Approve > FOAPAL / Ship Codes - Requisition 2938369'. The page title is 'FOAPAL / Ship Codes'. Below the title, there is a table with columns: Chart, Fund, Organization, Account, Program, Activity, and Location. The data row shows: Chart: E (East Carolina University), Fund: 111170 (AA General Institutional Support), Organization: 230601 (AF Purchasing), Account: 72110 (Office Supplies), Program: 0000 (Default Program Code). Below the table, there is a 'Ship To' section with a shipping address and contact information for East Carolina University Materials Mgmt. A callout box labeled '25.' points to the 'Ship To' section.

25.

25. Scroll down the page to view line item details.

The screenshot shows a list of line items in the ECU Materials Management system. The breadcrumb trail is 'Orders > Approvals > Requisitions to Approve > FOAPAL / Ship Codes - Requisition 2938369'. The page title is 'ECU Medical Storeroom'. Below the title, there is a table with columns: Product Description, Catalog No, Size / Packaging, Unit Price, Quantity, and Ext. Price. The data rows are: 1. GLASS, JERSEY, BROWN MEM-7100 1AV08 (680-24190, 1/PR, 6.38, 5 PR, 31.90 USD), 2. ISOPROPYL RUBBING ALCOHOL 16OZ EA/SWAN 1368992 CARDINAL70% (040-21000, 1/BO, 1.30, 4 BO, 5.20 USD), 3. 020-20490 GAUZE ST. 4X4 12 PLY PK OF 10 PK/10 128CSE J&J2322(GZ4412-10 020-20490 (1/PK, 3.80, 6 PK, 22.80 USD). Each row has a checkbox in the right margin. A callout box labeled '26.' points to the checkbox for line item 2. Another callout box labeled '27.' points to the 'Go' button in the top right corner of the table area.

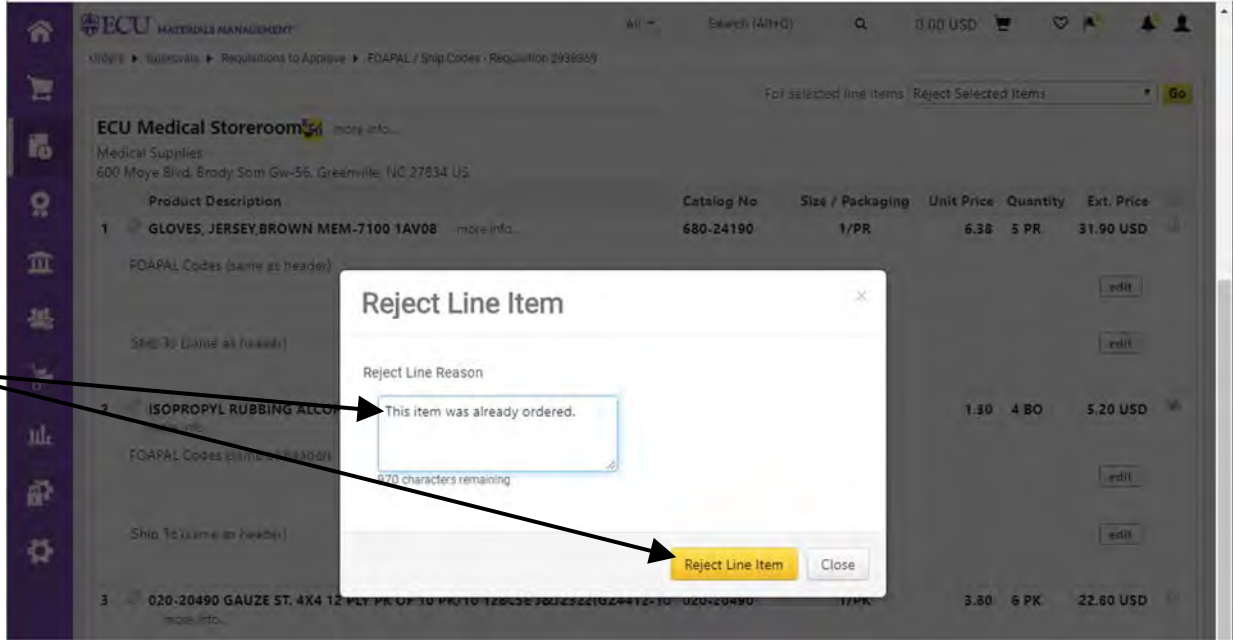
27.

26.

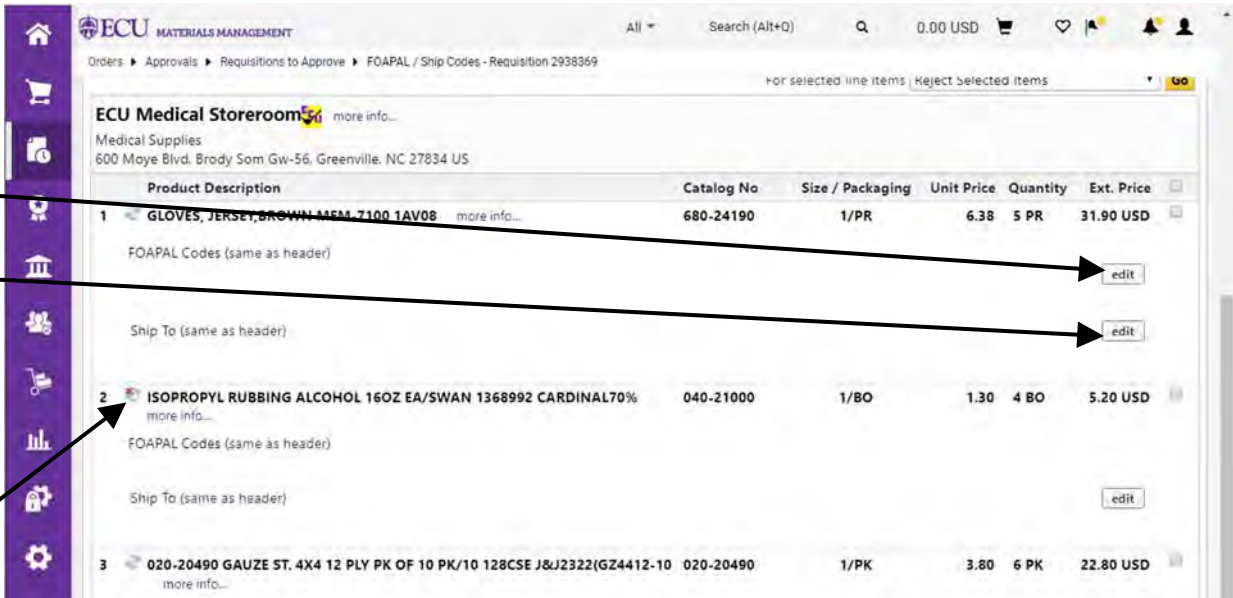
26. To reject a line item, select the **check box** for the item.
27. With **Reject Selected Items** selected, click the **Go** button.

APPROVALS

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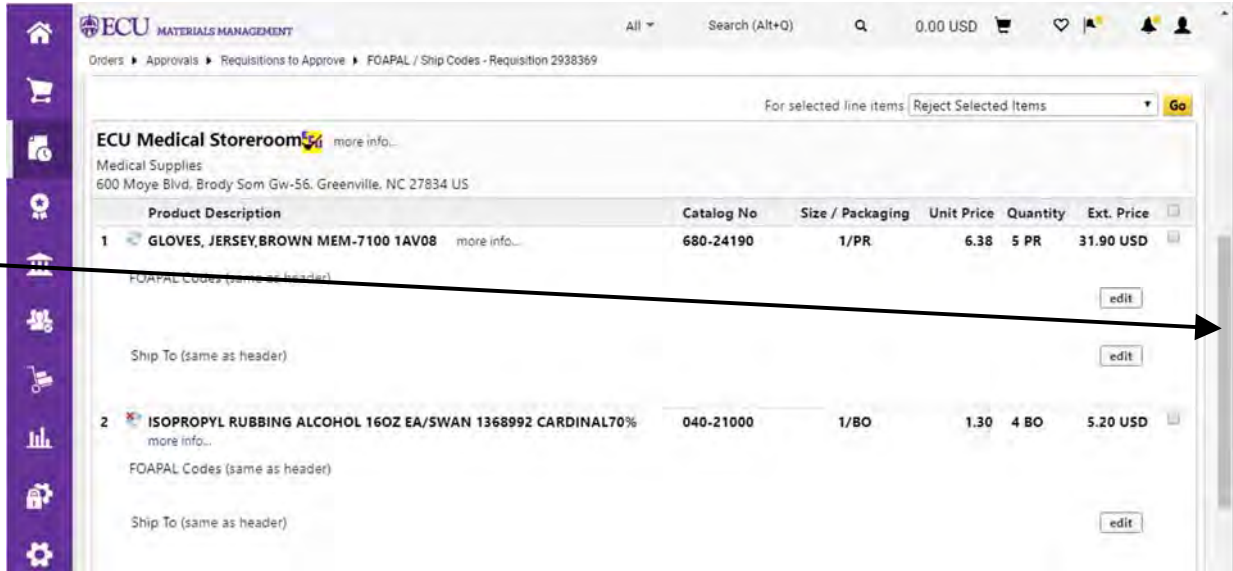
28. The **Add Note** pop-up becomes visible for you to indicate the reason for rejecting line item. After entering the reason, click on **Reject Line Item** button.



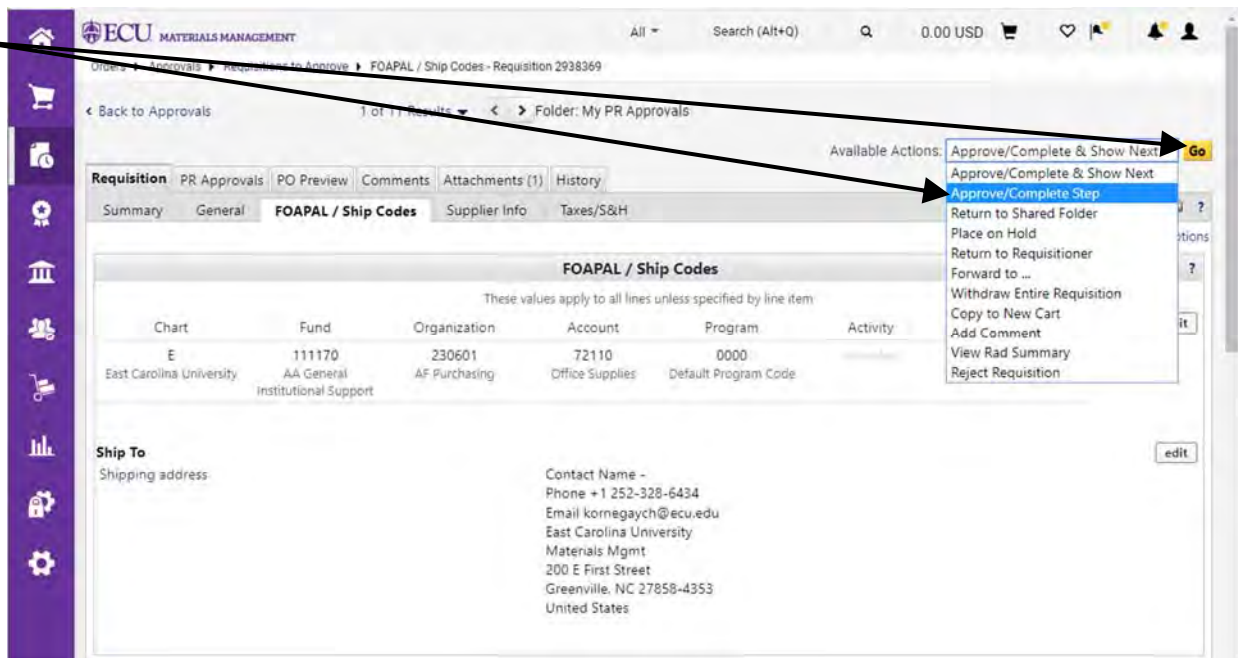
29. Notice that the icon for the 2nd line item has changed to **Pending Rejected Line Item**. **Note:** Once you **Approve / Complete** this document, the status will change to **Rejected**.
30. If necessary, click FOAPAL **edit** button to allow changes to FOAPAL string for selected line item. See Review Cart Header procedure, steps 17 – 29.
31. If necessary, click Ship Code **edit** button to allow changes to shipping information for selected line item. See Review Header Items procedure, steps 31 – 43.

APPROVALS

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32. After completing all review / edits, scroll to top of page.

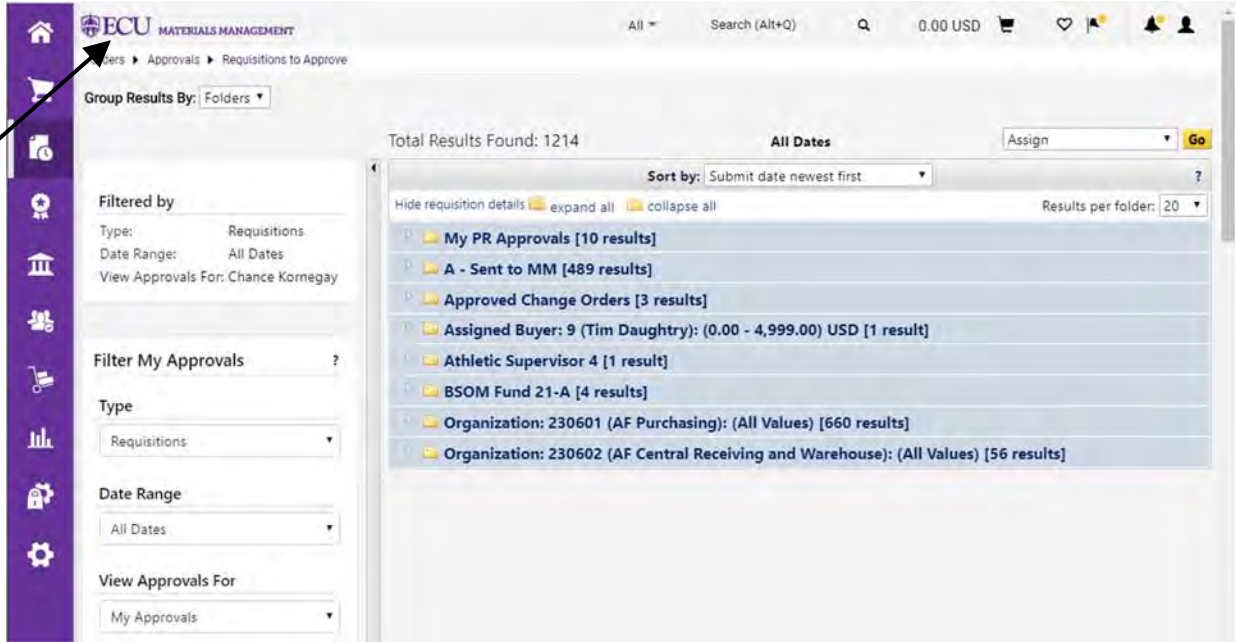


33. The default value in **Available Actions** drop down box is **Approve/Complete & Show Next**. For this example, we will select **Approve / Complete Step** and click **Go** button.

APPROVALS

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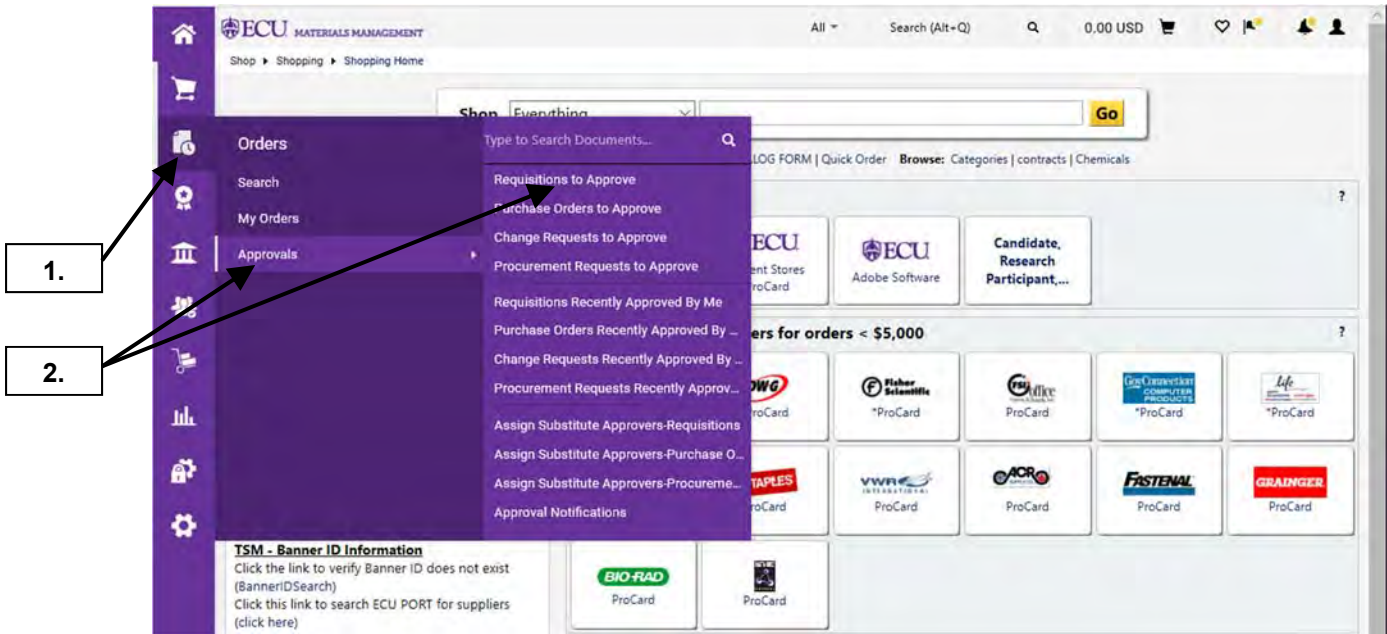
34.



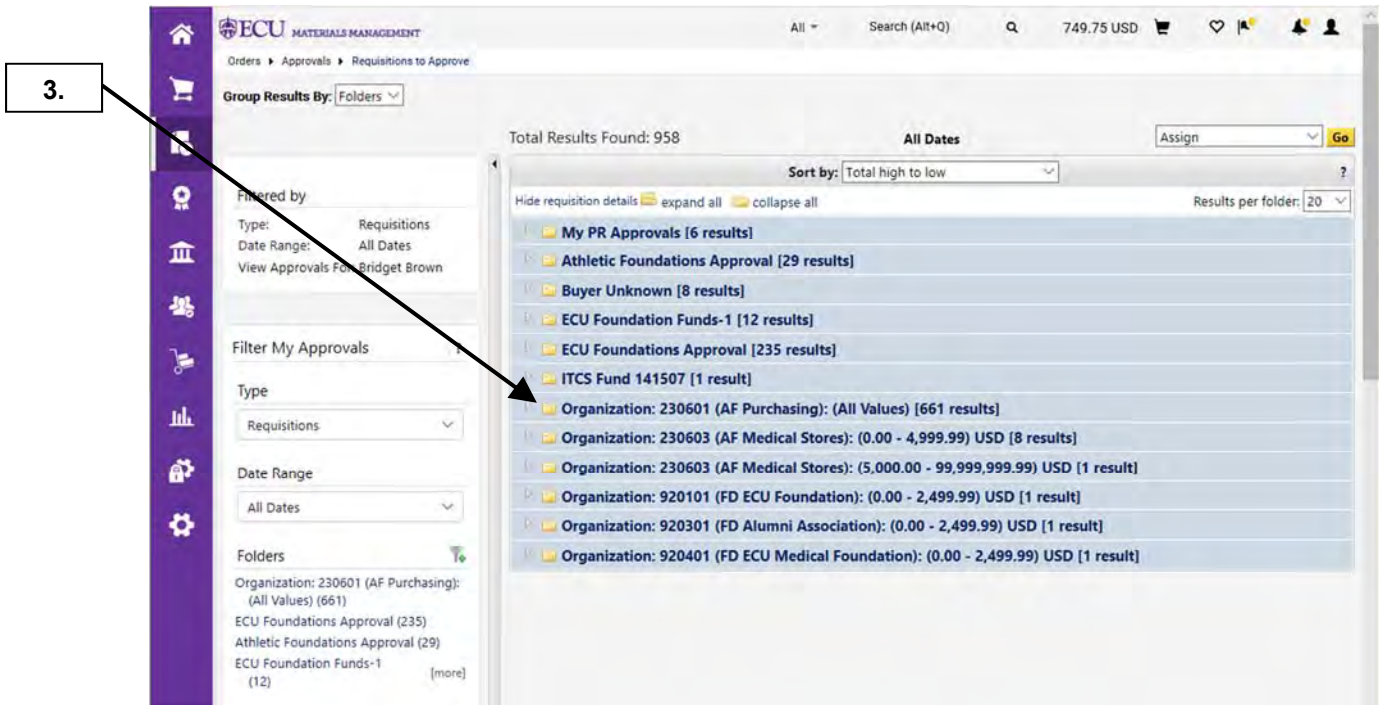
34. This completes steps for this procedure. Click on **ECU** icon to return to home page.

APPROVALS – QUICK VIEW

Last Updated on: 4/02/2020



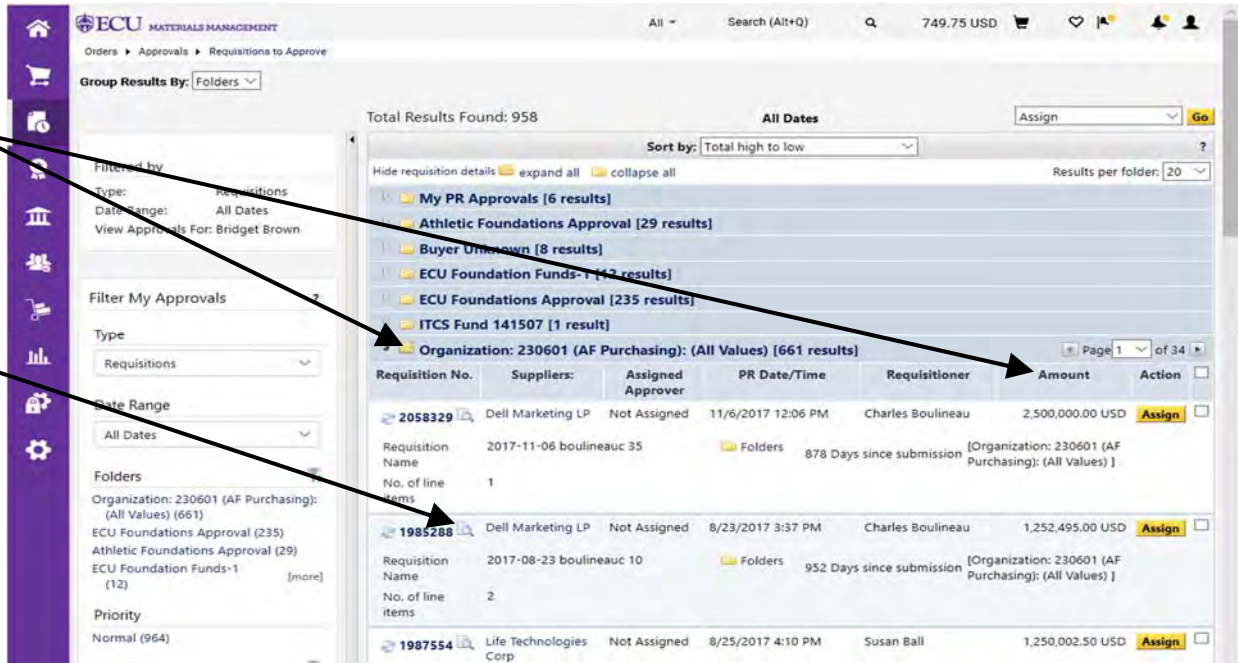
1. Hover on the **Orders** icon.
2. Select **Approvals** and then click on **Requisitions to Approve**.



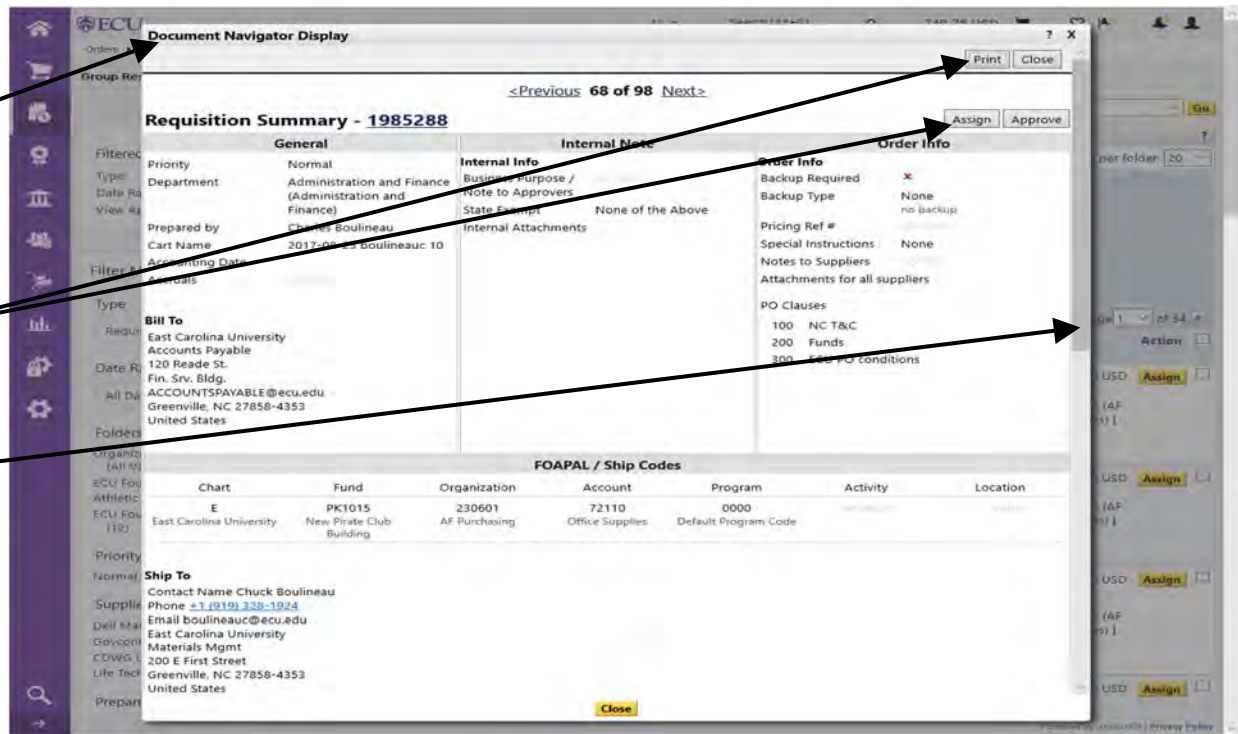
3. Click on one of the approval folders to view the listing of requisitions

APPROVALS – QUICK VIEW

Last Updated on: 4/02/2020



4. Notice # of **Pending** requisitions for this Organization. In reviewing the requisitions in the folder, you can determine **Requisition No.**, **Suppliers**, **Assigned Approver**, **PR Date/Time**, **Requisitioner**, **Amount**, **Requisition Name**, **No. of line items**, **This PR has notes**, and **Folders**.
5. To complete a **Quick View** approval of a requisition within your approval queue, click on **Quick View** icon.



6. The Quick View overlay is now displayed, allowing you to determine if you can complete a quick approval.
7. From here, you can complete the following actions: **Assign**, **Approve**, **Print**, and **Close**.
8. Scroll down **Quick View** overlay to see item information for the requisition.

APPROVALS – QUICK VIEW

Last Updated on: 4/02/2020

Supplier / Line Item Details

Dell Marketing LP
PO Purchase Order 3
1242 Greenville Blvd, Greenville, NC 27858 US

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
Optiplex 755	na	EA	2,499.99 USD	500 EA	1,249,995.00 USD
Latitude D710	na	EA	1,250.00 USD	2 EA	2,500.00 USD

Supplier subtotal: 1,252,495.00 USD
Shipping: 0.00
Handling: 0.00
Supplier total: 1,252,495.00 USD

Subtotal: 1,252,495.00
Shipping: 0.00
Handling: 0.00
Total: 1,252,495.00 USD

<Previous 68 of 98 Next>
Close

9. After reviewing all the items, scroll back to the top of the **Quick View**.

Requisition Summary - 1985288

Assign Approve Use

General	Internal Note	Order Info
Priority: Normal Department: Administration and Finance (Administration and Finance) Prepared by: Charles Boulineau Cart Name: 2017-08-23 boulineau 10 Accounting Date: Accruals: Bill To East Carolina University Accounts Payable 120 Reade St. Fin. Srv. Bldg. ACCOUNTSPAYABLE@ecu.edu Greenville, NC 27858-4353 United States	Internal Info Business Purpose / Note to Approvers State Exempt Internal Attachments	Backup Required: X Backup Type: None (no backup) Billing Ref #: Special Instructions: None Notes to Suppliers Attachments for all suppliers PO Clauses: 100 NC T&C 200 Funds 300 ECU PO conditions

FOAPAL / Ship Codes

Chart	Fund	Organization	Account	Program	Activity	Location
E	PK1015	230601	72110	0000		
East Carolina University	New Pirate Club Building	AF Purchasing	Office Supplies	Default Program Code		

Ship To
Contact Name: Chuck Boulineau
Phone: 1.919.328.1924
Email: boulineauc@ecu.edu
East Carolina University
Materials Mgmt
200 E First Street
Greenville, NC 27858-4353
United States

Close

10. Click **Approve** button to complete **Quick View** approval for this requisition. **Note** that if you determine you need to spend more time reviewing the order, you can click on **Assign** button.

APPROVALS – QUICK VIEW

Last Updated on: 4/02/2020

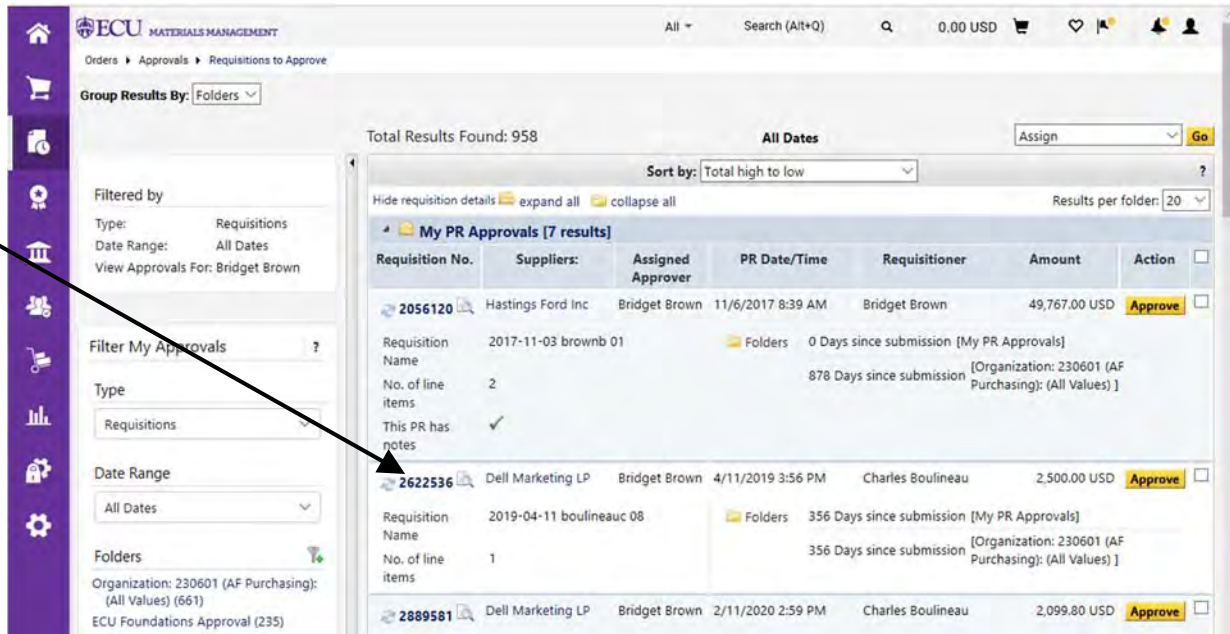
The screenshot displays the 'APPROVALS – QUICK VIEW' page in the ECU Materials Management system. The top navigation bar includes the ECU logo, 'MATERIALS MANAGEMENT', and a search bar. The main content area shows a list of requisitions with the following columns: Requisition No., Suppliers, Assigned Approver, PR Date/Time, Requisitioner, Amount, and Action. The table lists several requisitions, including 2058329, 1987554, and 1987573. A sidebar on the left provides filters for 'Type', 'Date Range', and 'Folders'. Two callout boxes are present: '12.' points to the ECU logo in the top left, and '11.' points to the 'Assign' button in the table.

Requisition No.	Suppliers	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action
2058329	Dell Marketing LP	Not Assigned	11/6/2017 12:06 PM	Charles Boulineau	2,500,000.00 USD	Assign
1987554	Life Technologies Corp	Not Assigned	8/25/2017 4:10 PM	Susan Ball	1,250,002.50 USD	Assign
1987573	Life Technologies Corp	Not Assigned	8/25/2017 4:11 PM	Susan Ball	1,250,002.50 USD	Assign

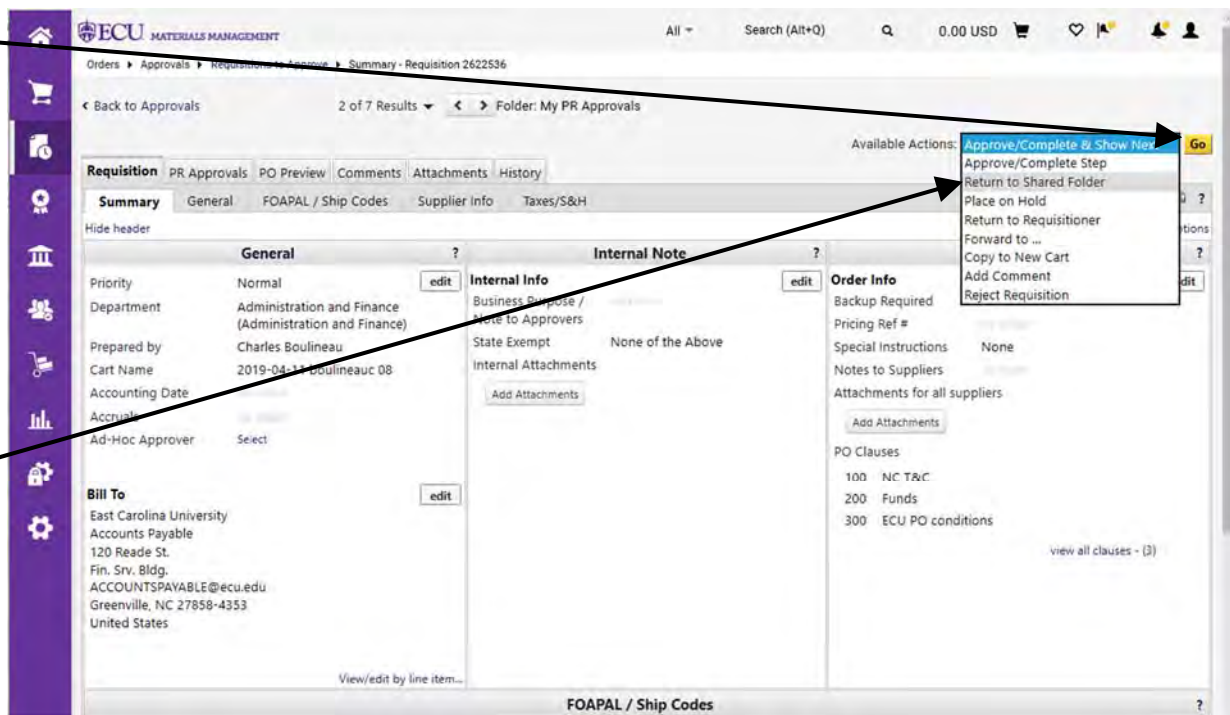
- 11. The Quick View Approval action removed this requisition from your approval folder.
- 12. This completes steps for this procedure. Click on **ECU** icon to return to home page.

APPROVALS - RETURN TO SHARED FOLDER

Last Updated on: 4/02/2020



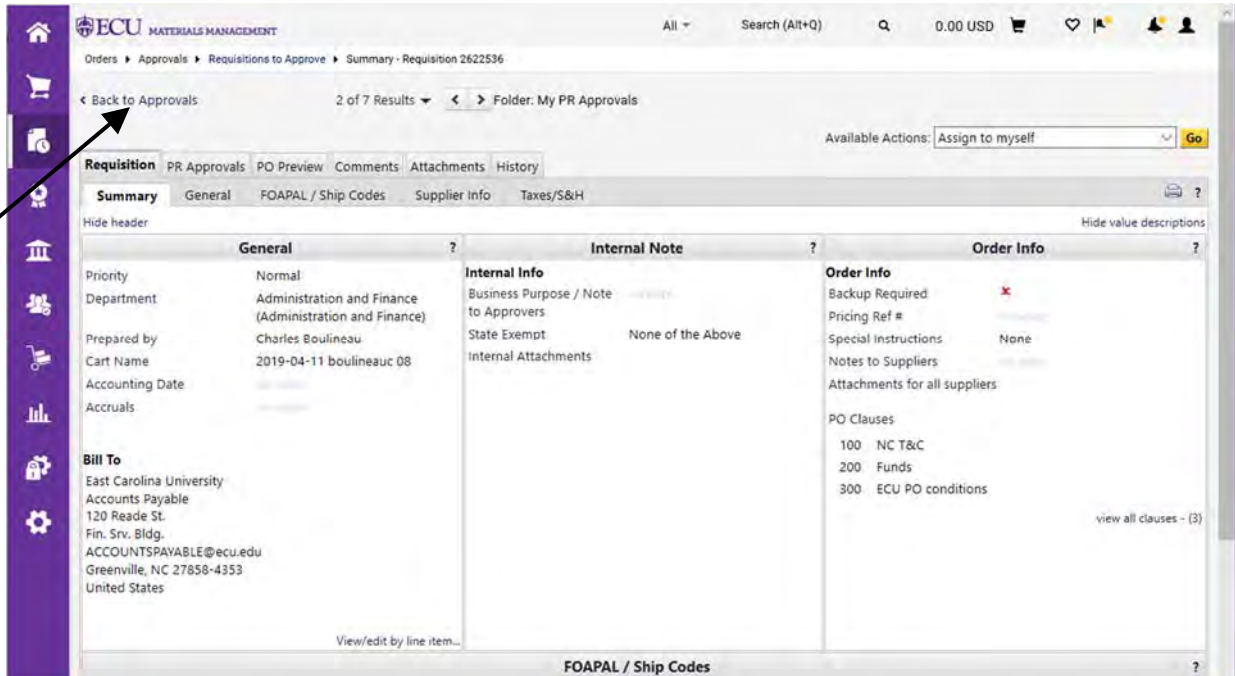
1. The following steps will show how to return a requisition to shared Organization folder in the scenario where you do not have time to complete an approval. Click on requisition # in **Approval** folder.



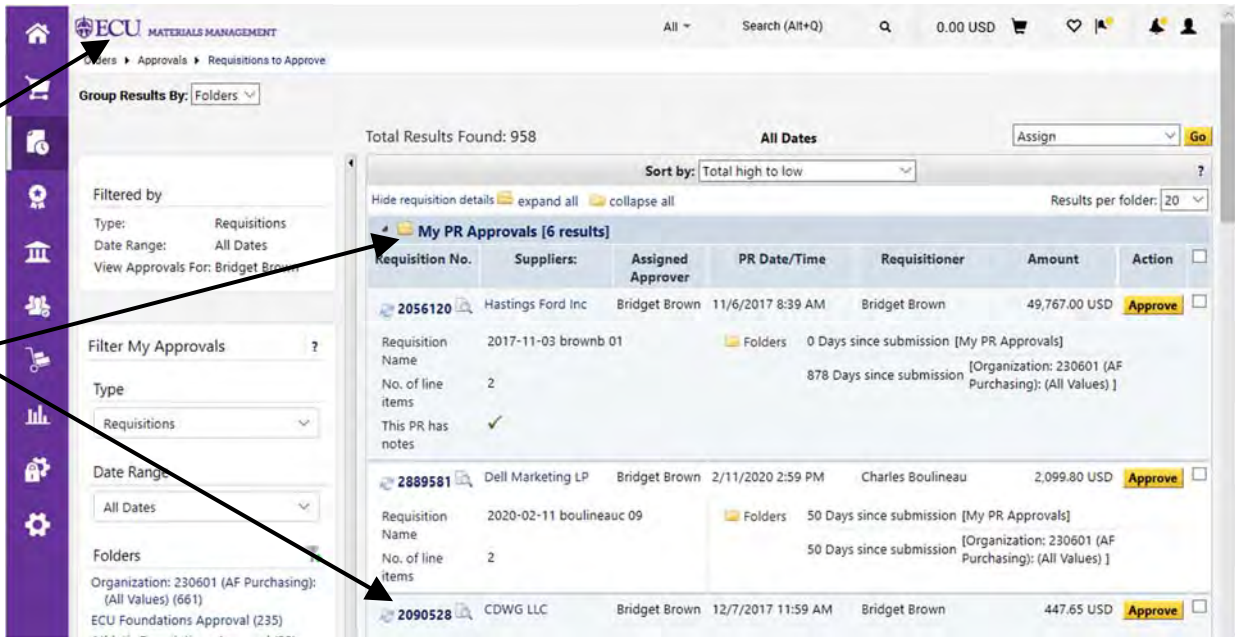
2. Select **Return to Shared Folder** as the **Available Actions**.
3. Click on **Go** button.

APPROVALS - RETURN TO SHARED FOLDER

Last Updated on: 4/02/2020



4. Click on **Return to Approvals** link.

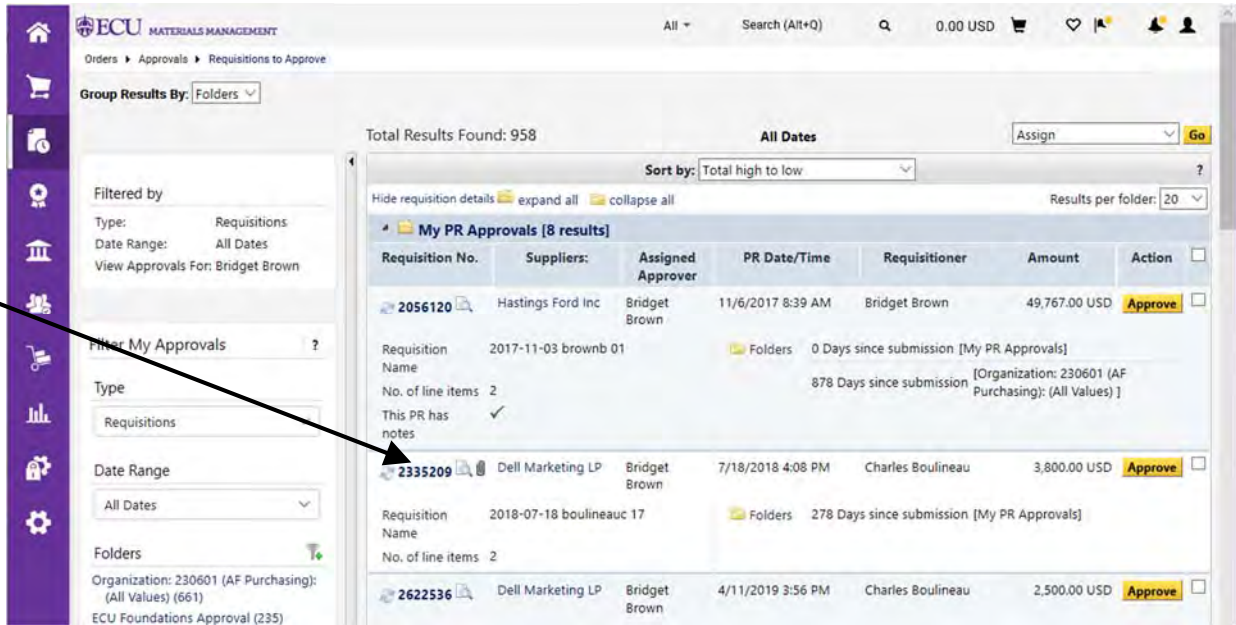


5. Notice that requisition was removed from **My PR Approvals** folder and is now in **Organization** folder.

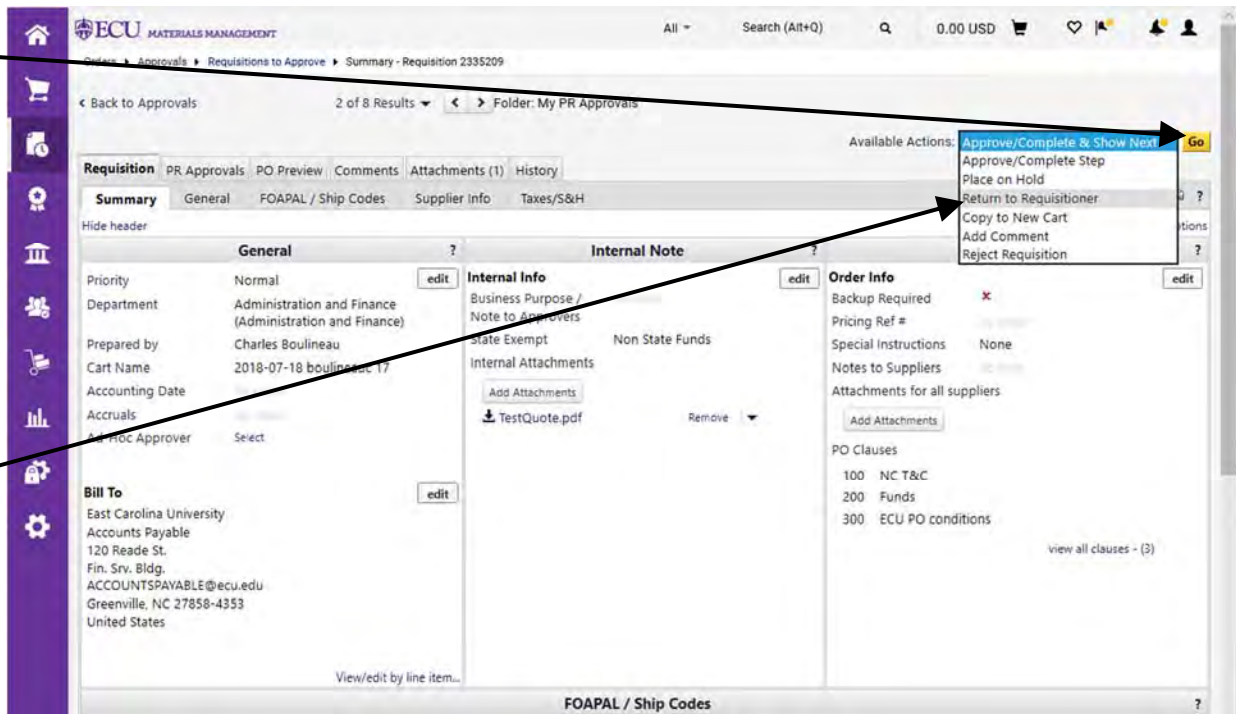
6. This completes steps for this procedure. Click on **ECU** icon to return to home page.

APPROVALS – RETURN TO REQUISITIONER

Last Updated on: 4/02/2020



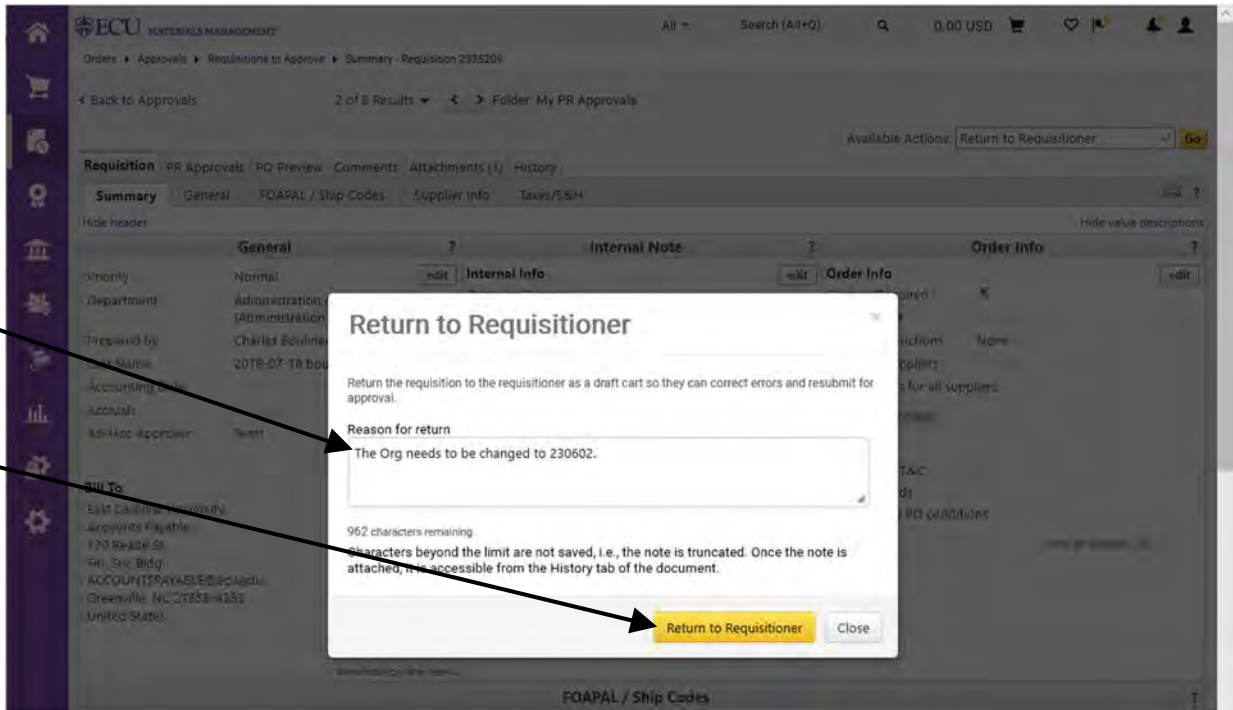
1. The following steps will show how to return a requisition to requisitioner for changes to be made to the document. Click on requisition # in **My PR Approvals** folder.



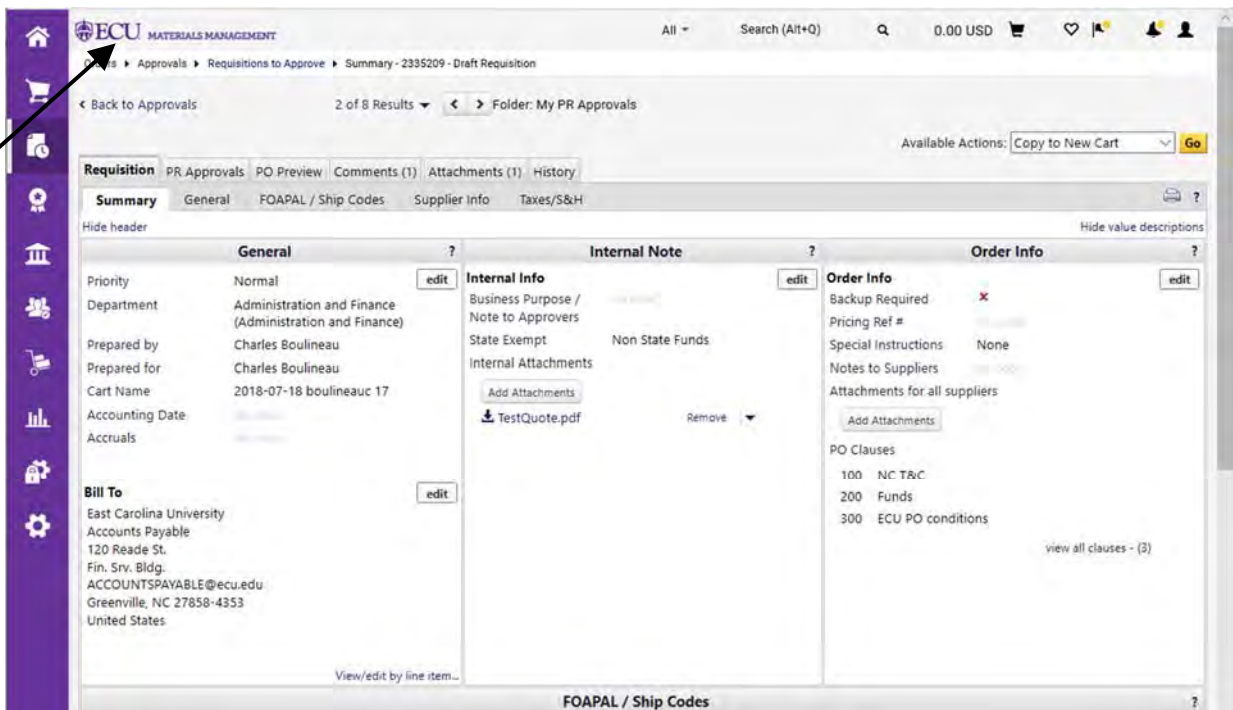
2. Select **Return to Requisitioner** as **Available Actions**.
3. Click on **Go** button.

APPROVALS – RETURN TO REQUISITIONER

Last Updated on: 4/02/2020



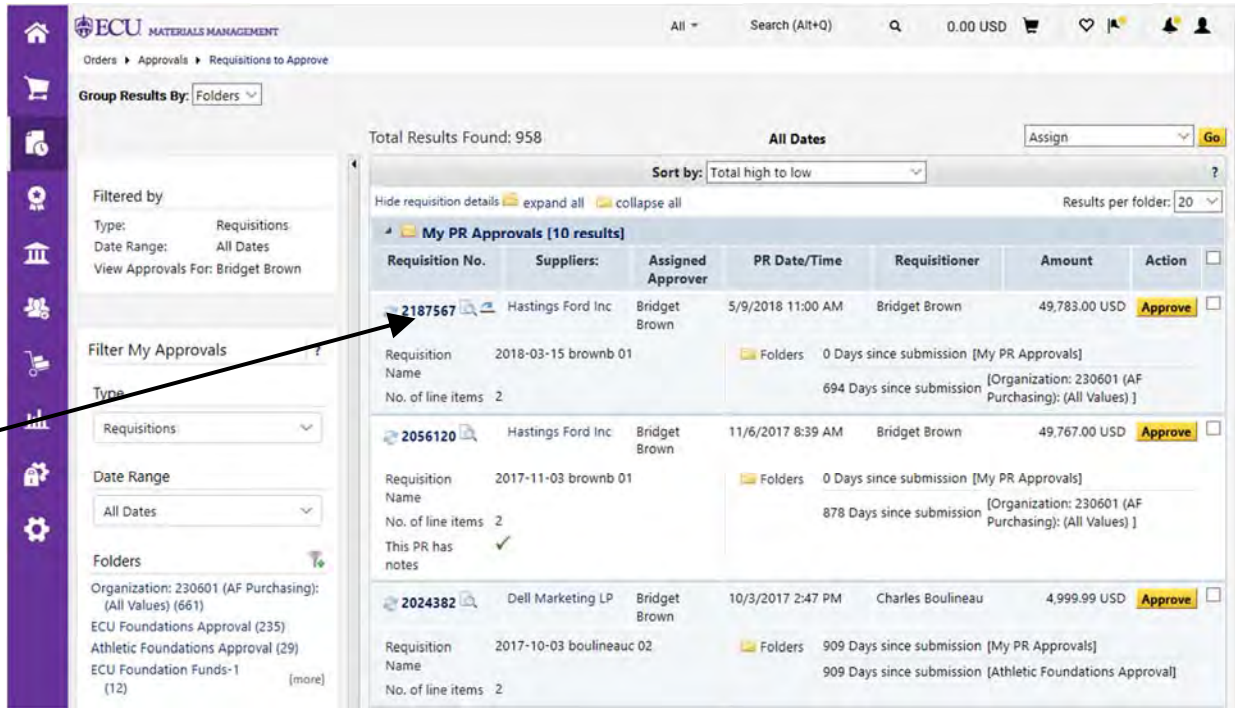
4. Enter a detailed reason for returning requisition back to requisitioner.
5. Click **Return to Requisitioner** button.



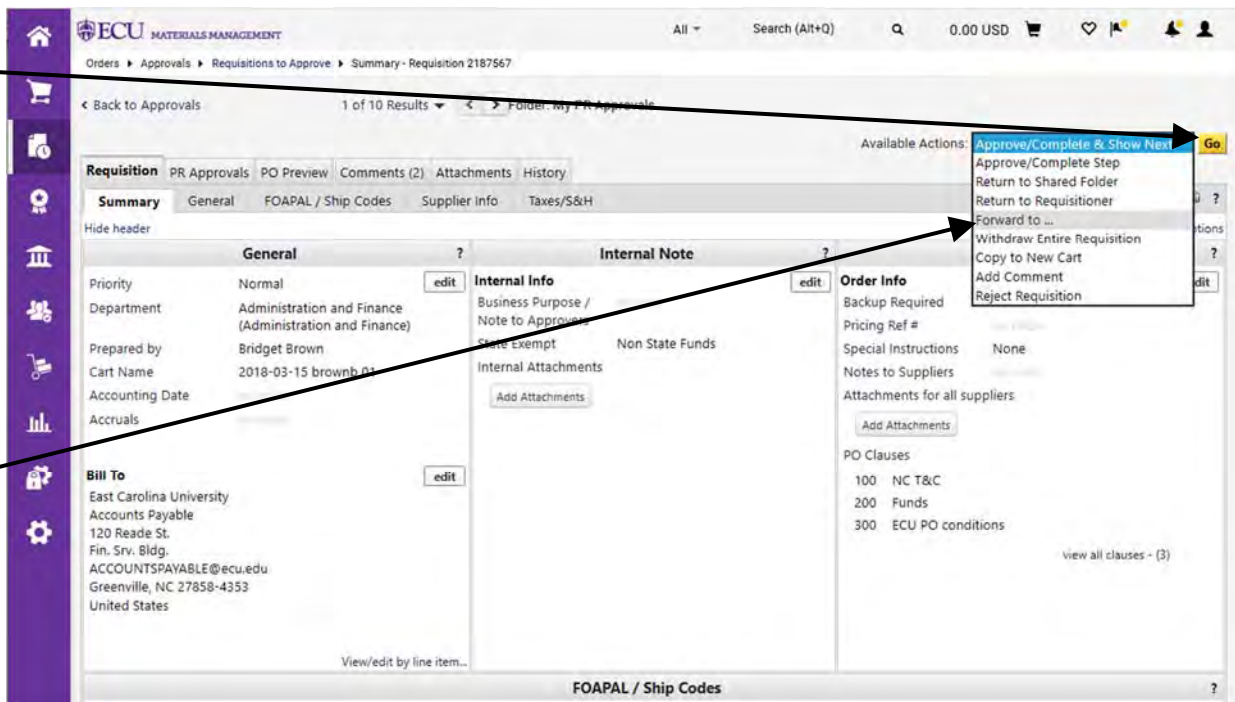
6. The requisition has been returned to the requisitioner and is no longer listed in **My PR Approvals** folder. This completes steps for this procedure. Click on **ECU** icon to return to home page.

APPROVALS - FORWARD TO

Last Updated on: 4/02/2020



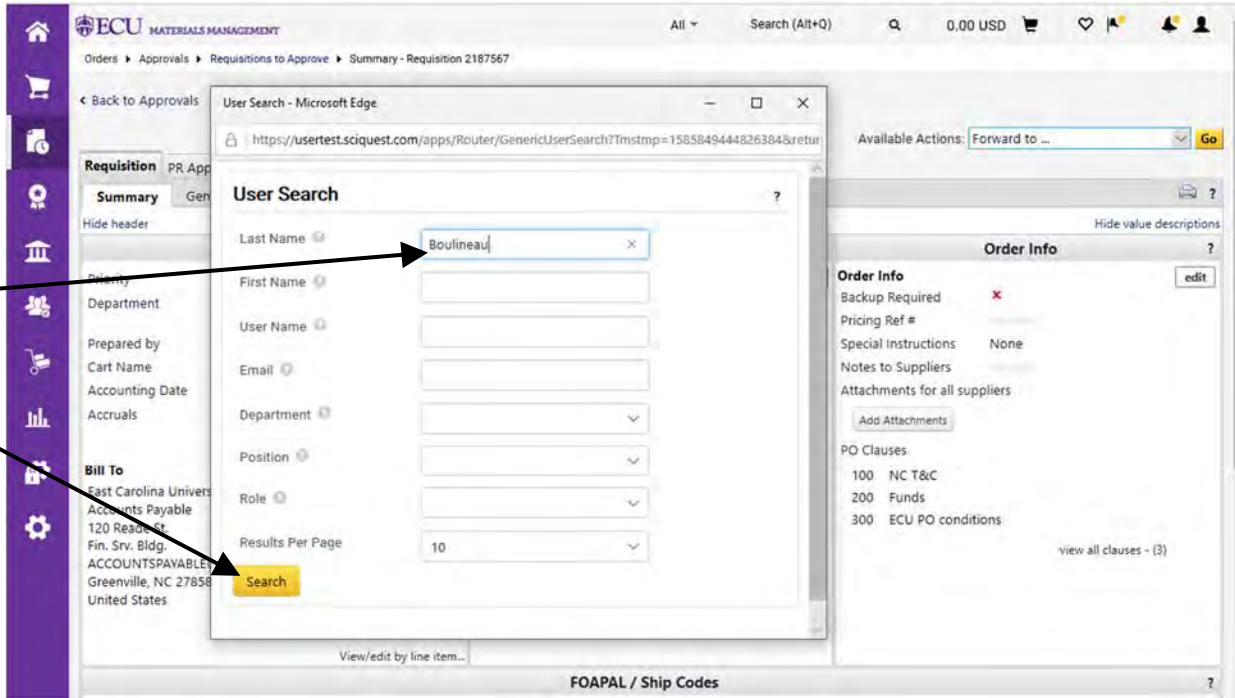
1. The following steps will show how to forward a requisition to another Division Approver for this Org folder in the event you cannot complete approval. Click on requisition # in **My PR Approvals** folder.



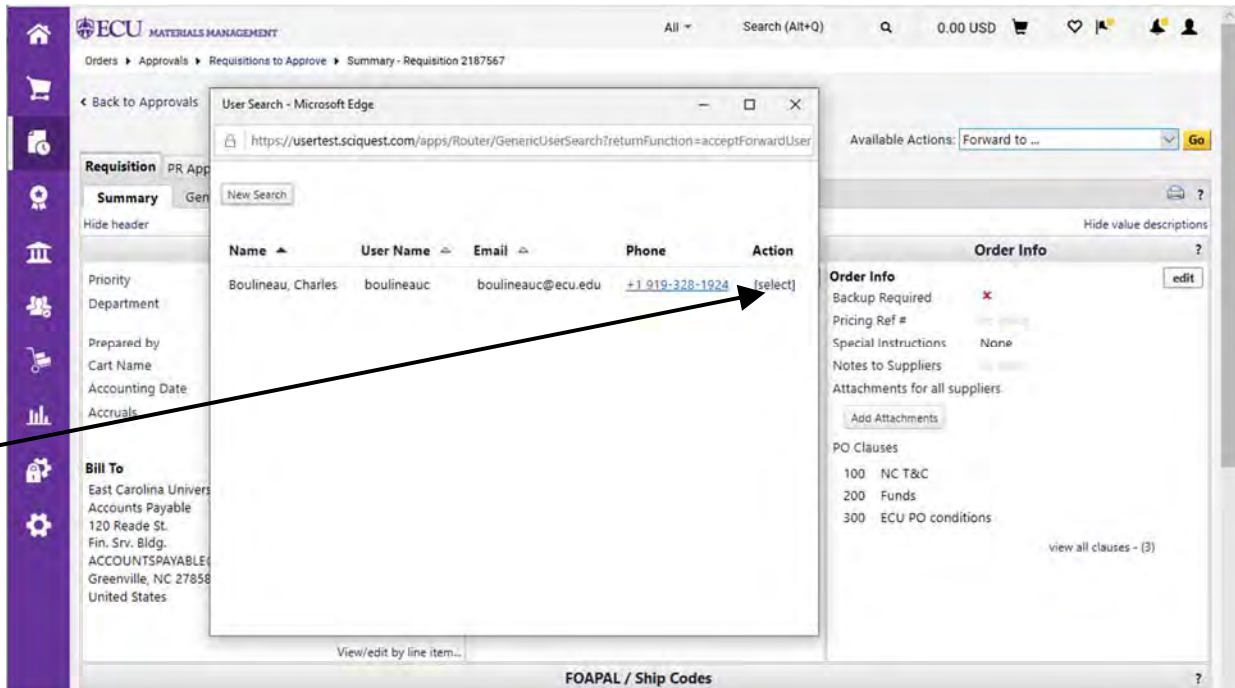
2. Select **Forward to...** as **Available Actions**.
3. Click on **Go** button.

APPROVALS - FORWARD TO

Last Updated on: 4/02/2020



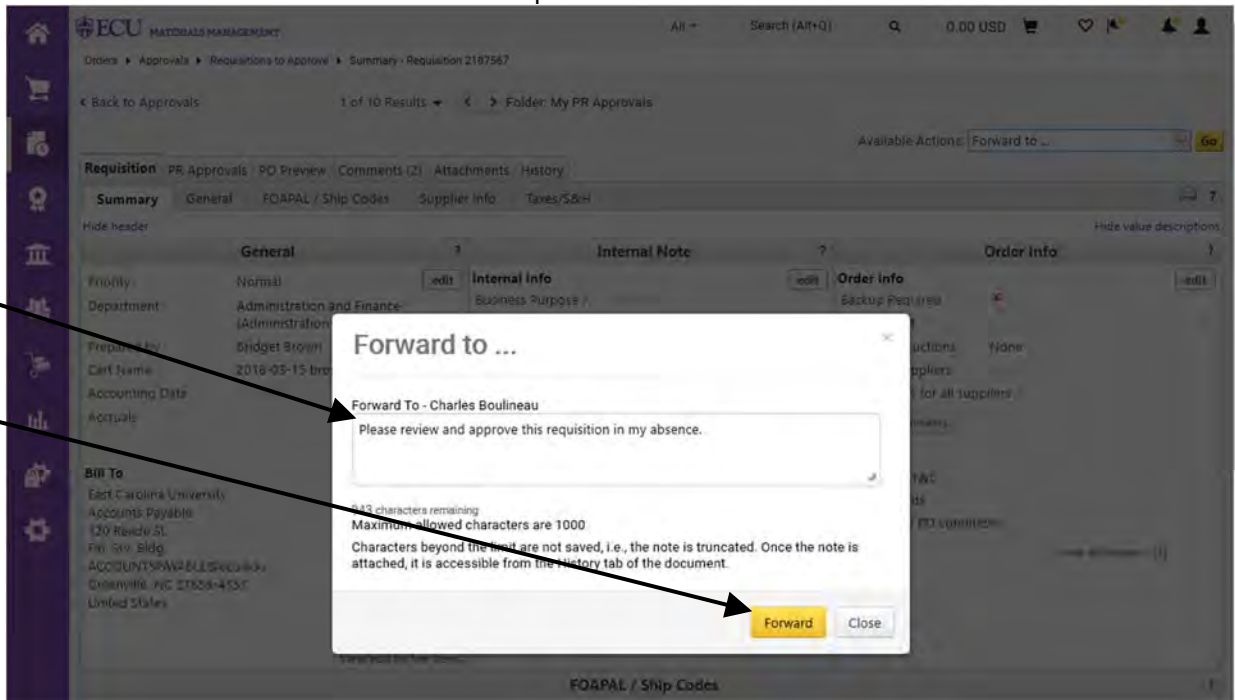
4. Enter **Last Name** of a Division Approver in the **User Search** pop-up.
5. Click the **Search** button.



6. Click **{select}** link.

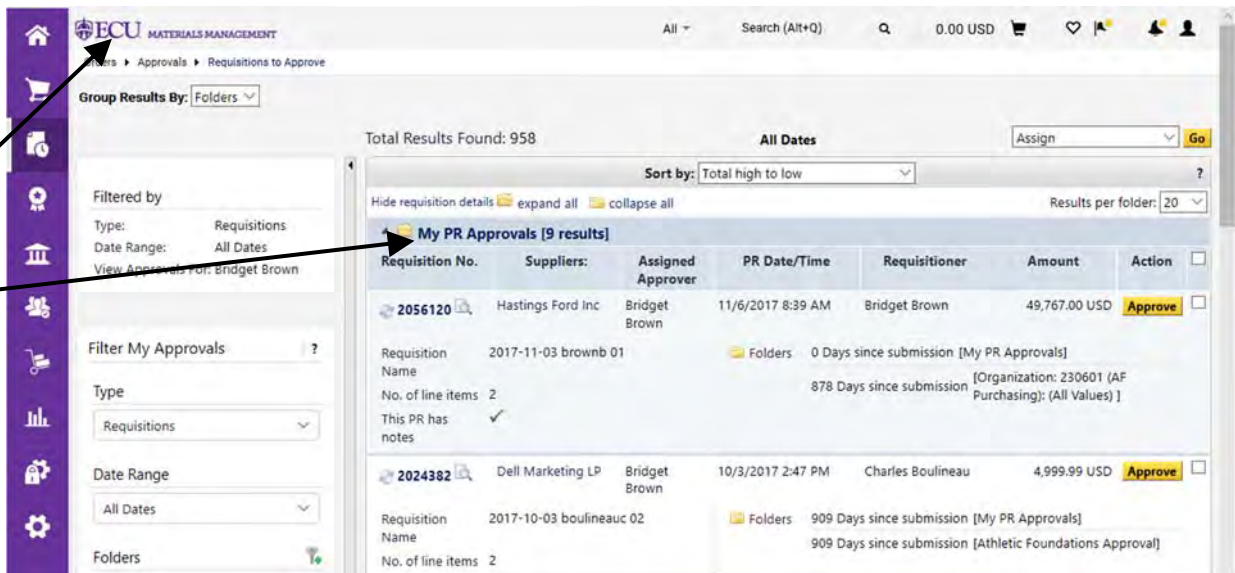
APPROVALS - FORWARD TO

Last Updated on: 4/02/2020



7. Enter an appropriate note in **Forward to...** pop-up.

8. Click **Forward** button.

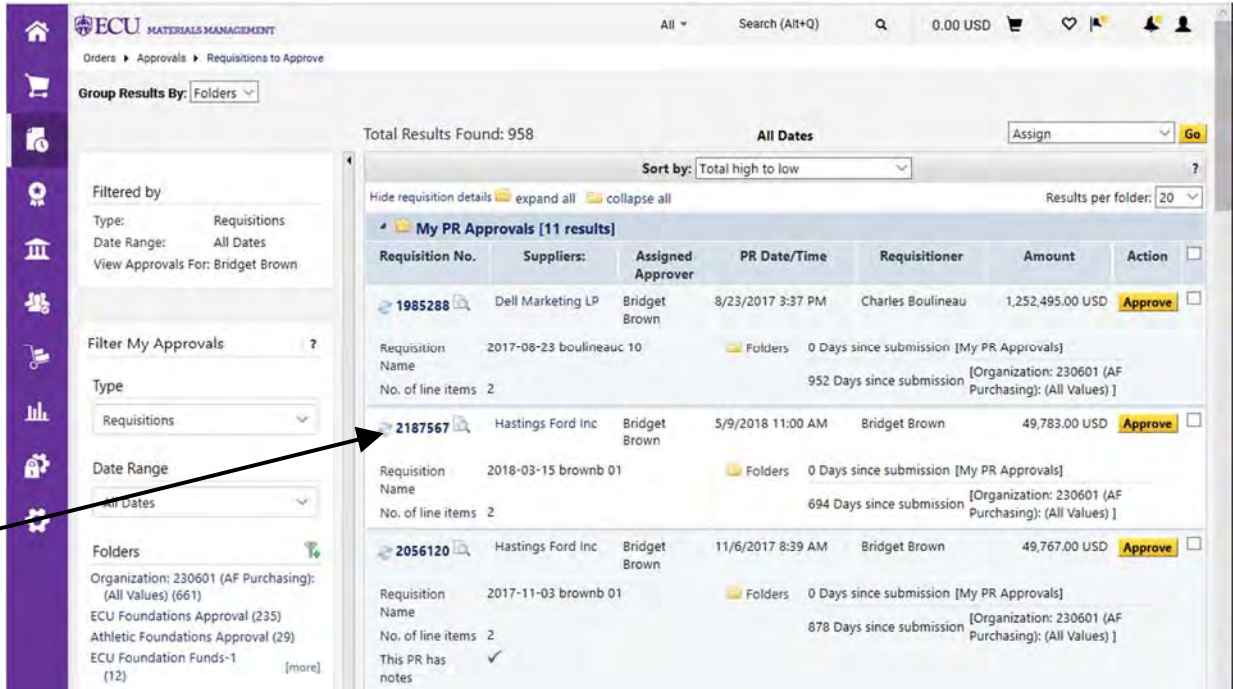


9. You are taken back to My Approvals.

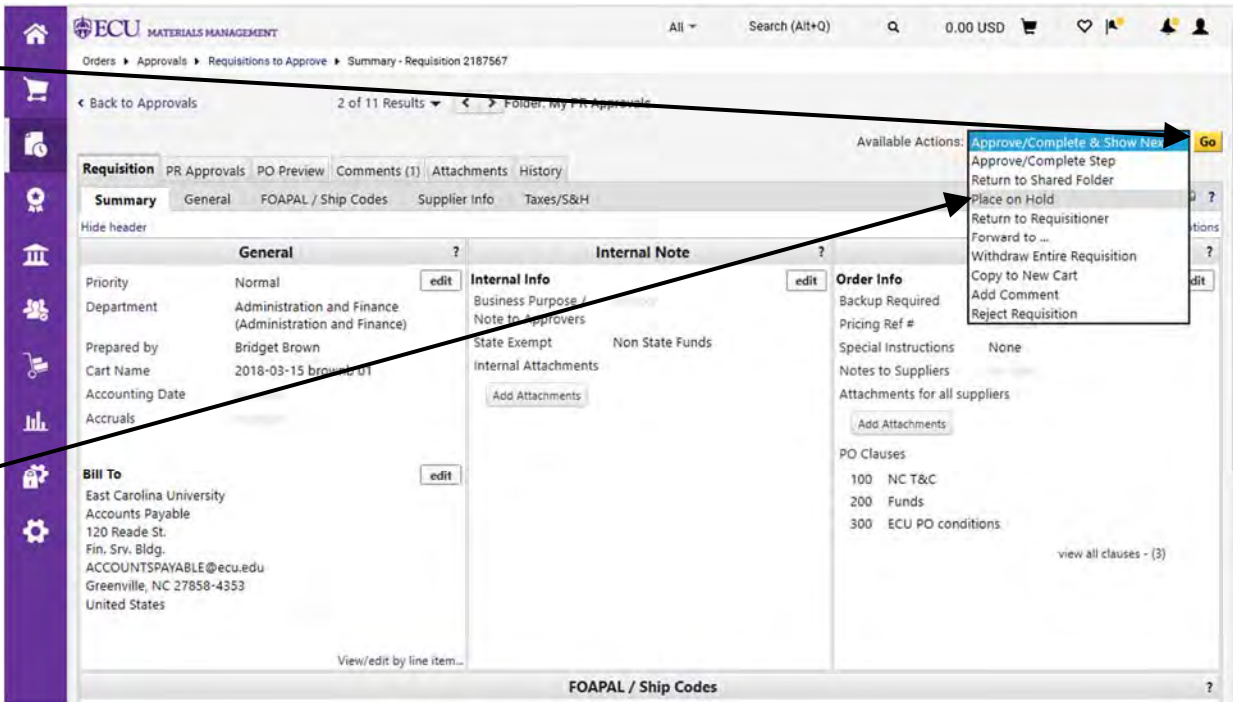
10. This completes steps for this procedure. Click on **ECU** icon to return to home page.

APPROVALS – PLACE ON HOLD

Last Updated on: 4/02/2020



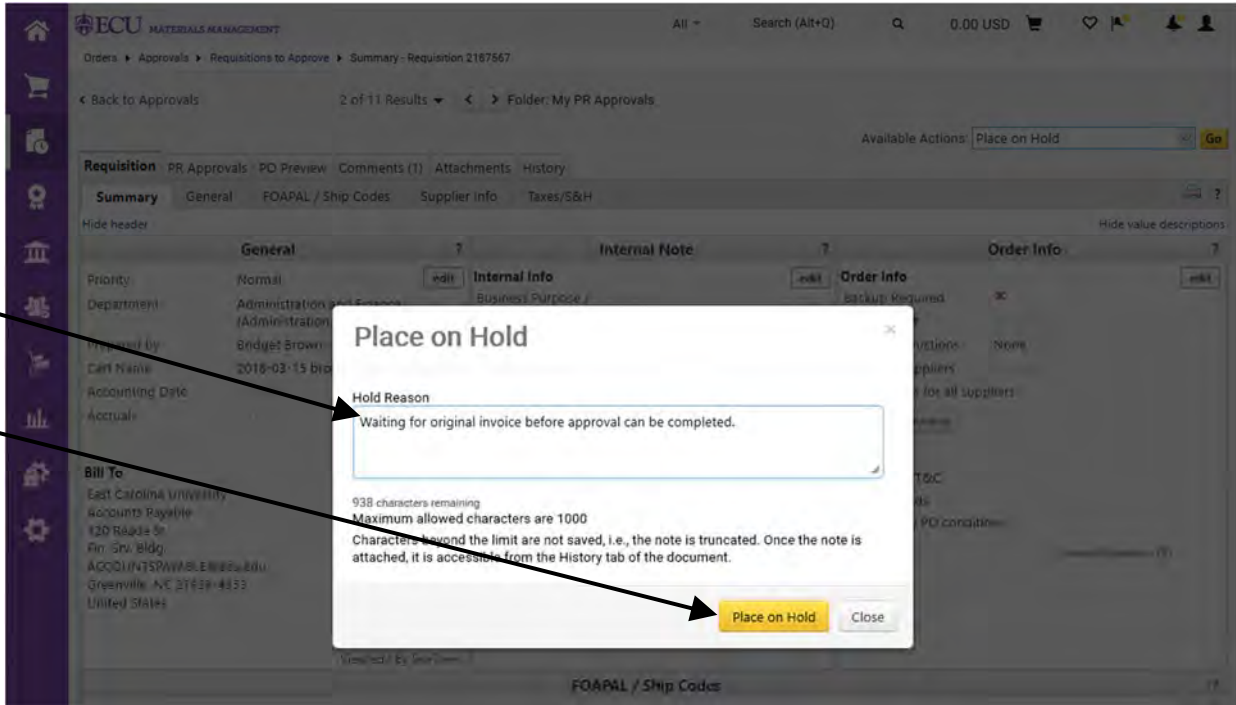
1. The following steps will show how to place a requisition on hold to indicate that you are waiting for additional information. Click on requisition # in **My PR Approvals** folder.



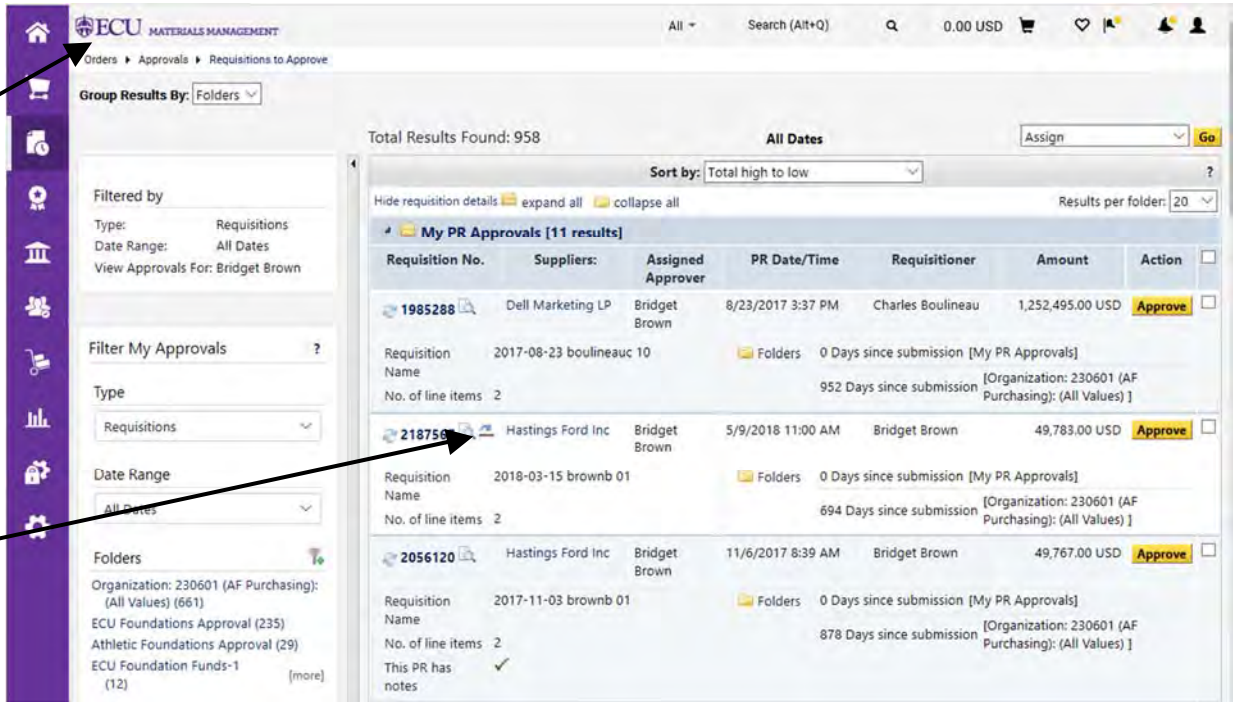
2. Select **Place on Hold** as **Available Actions**.
3. Click on **Go** button.

APPROVALS – PLACE ON HOLD

Last Updated on: 4/02/2020



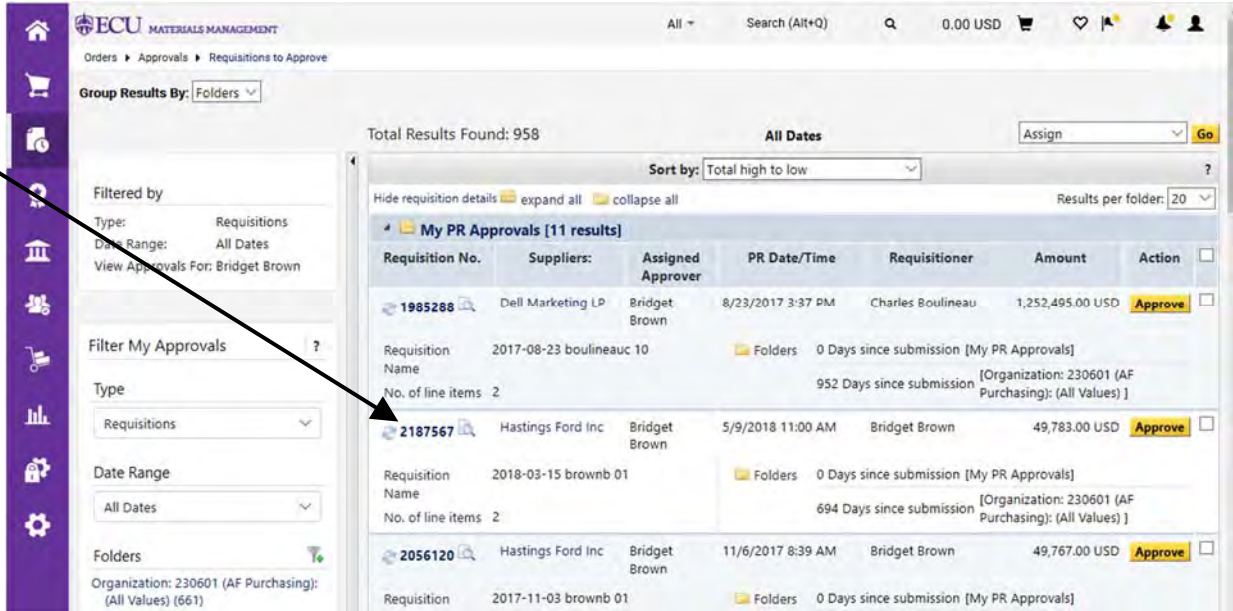
4. Enter **Hold Reason** in **Place on Hold** pop-up.
5. Click **Place on Hold** button.



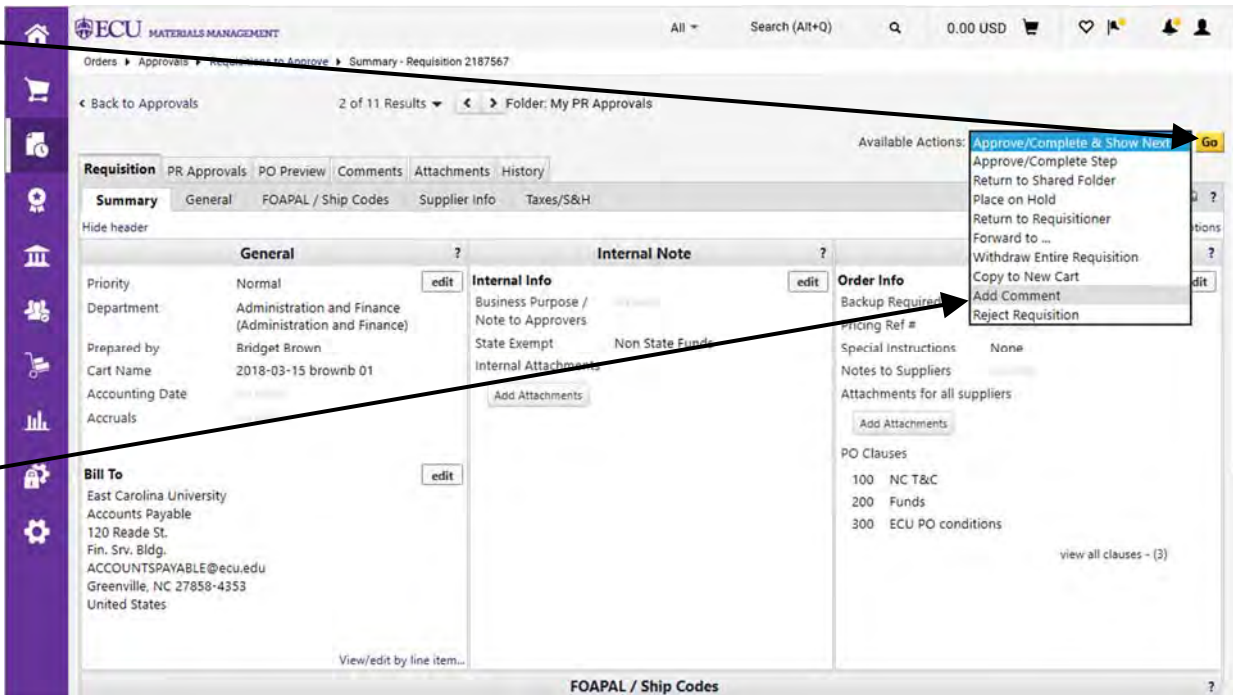
6. Note **on hold** icon indicates status of requisition in **My PR Approvals** queue.
7. Approval can be completed once the required information has been received. This completes steps for this procedure. Click on **ECU** icon to return to home page.

APPROVALS - ADD COMMENTS

Last Updated on: 4/02/2020



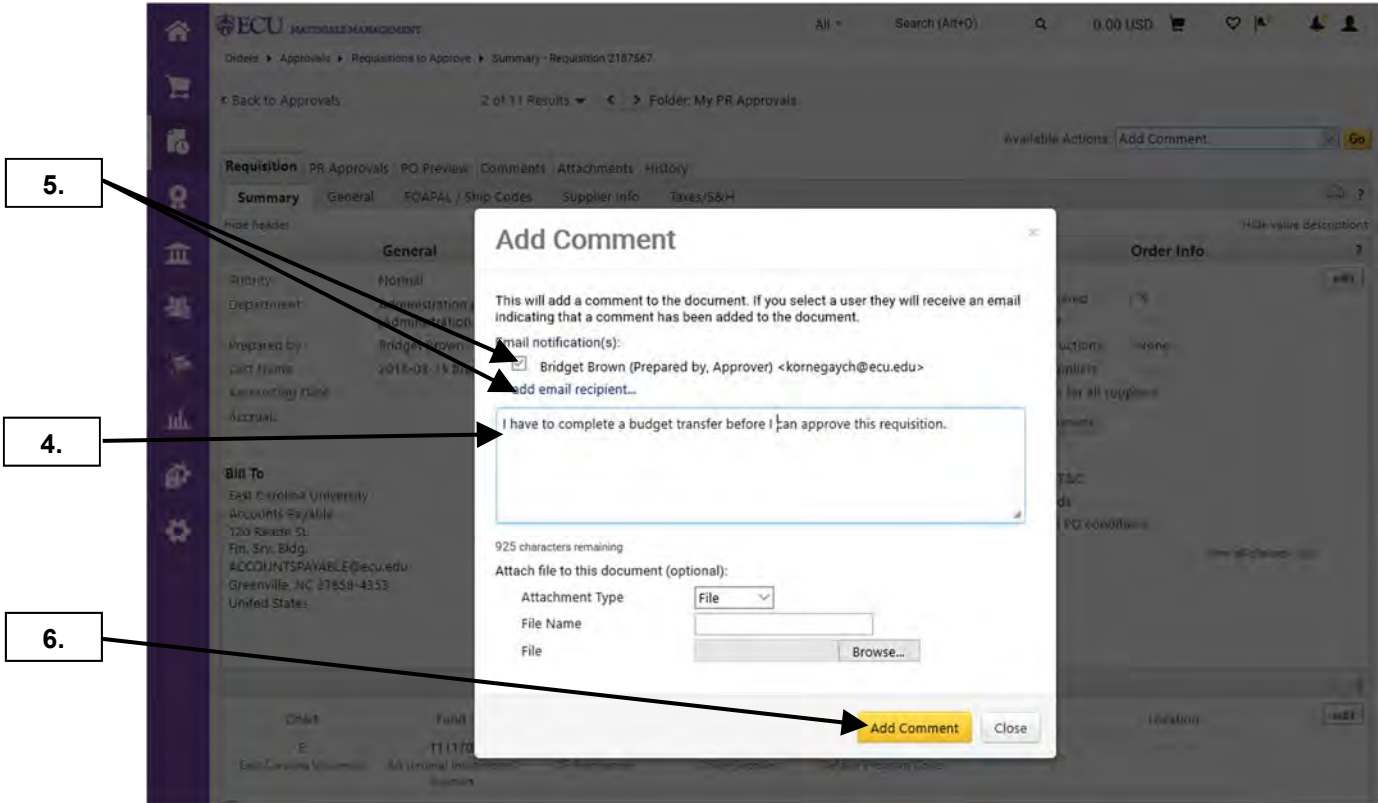
1. The following steps will show how to place comments in history and in **Comments** tab for a requisition. Click on requisition # in **My PR Approvals** folder. **Important Note:** Once you add a comment, it cannot be edited or deleted.



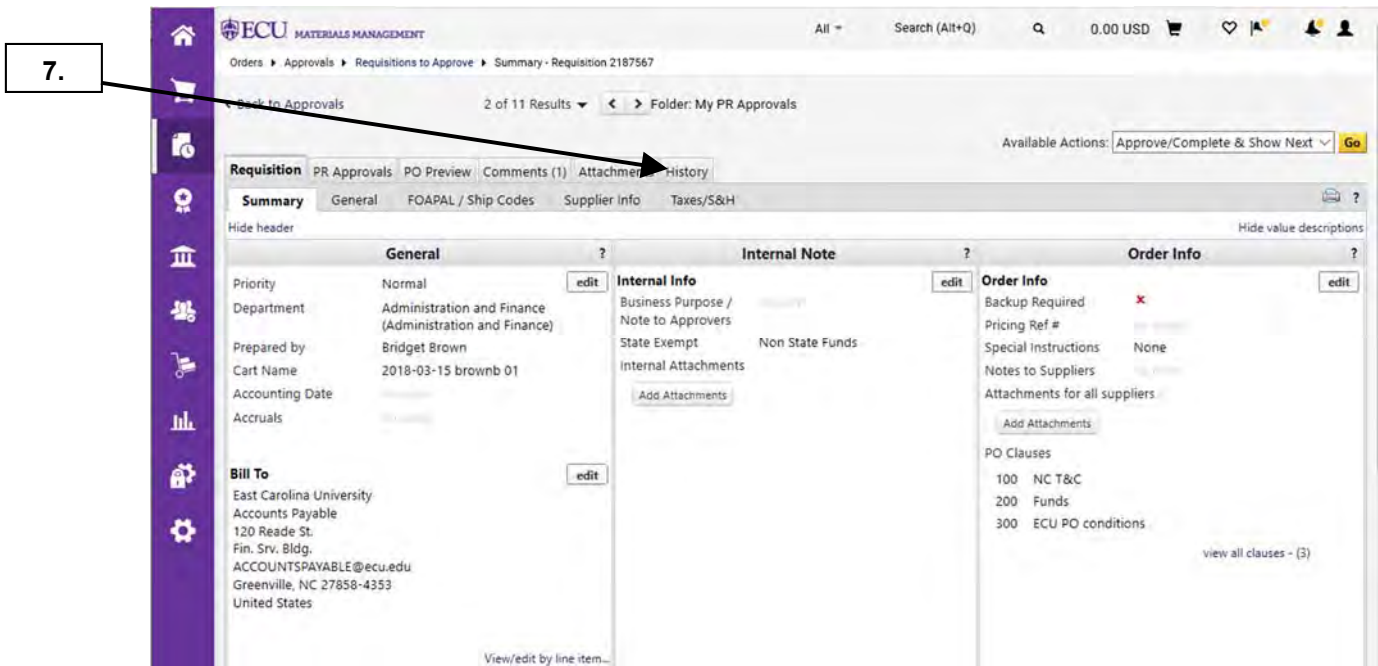
2. Select **Add Comment** as **Available Actions**.
3. Click on **Go** button.

APPROVALS - ADD COMMENTS

Last Updated on: 4/02/2020



4. Enter **Comment** in **Add Comment** pop-up.
5. Select the requisitioner and other approvers as an option if you want them to receive an email notification for the comment on the document. You can also click **add email recipients...** for other active PORT end-users that may need to receive a notification.
6. Click on **Add Comment** button.



7. Click on **History** tab to view the comment.

APPROVALS - ADD COMMENTS

Last Updated on: 4/02/2020

9. Click on **Comments** tab to view the comment.

8. Notice comment in History.

Line No	Date/Time	User	Step(s)	Action	Field Name	From	To	Note
	4/2/2020 1:27 PM	Bridget Brown		Comment Added				I have to complete a budget transfer before I can approve this requisition.
	4/2/2020 1:21 PM	Bridget Brown	Org (Division) Approval	Requisition assigned				
	5/9/2018 11:00 AM	System	Banner System Validation	Requisition approved				

- 8. Notice comment in History.
- 9. You can also click on **Comments** tab to view the comment.

11. Click on **ECU** icon to return to home page.

10. Notice comment in the **Comments** tab.

Add Comment

Show comments for: Requisition

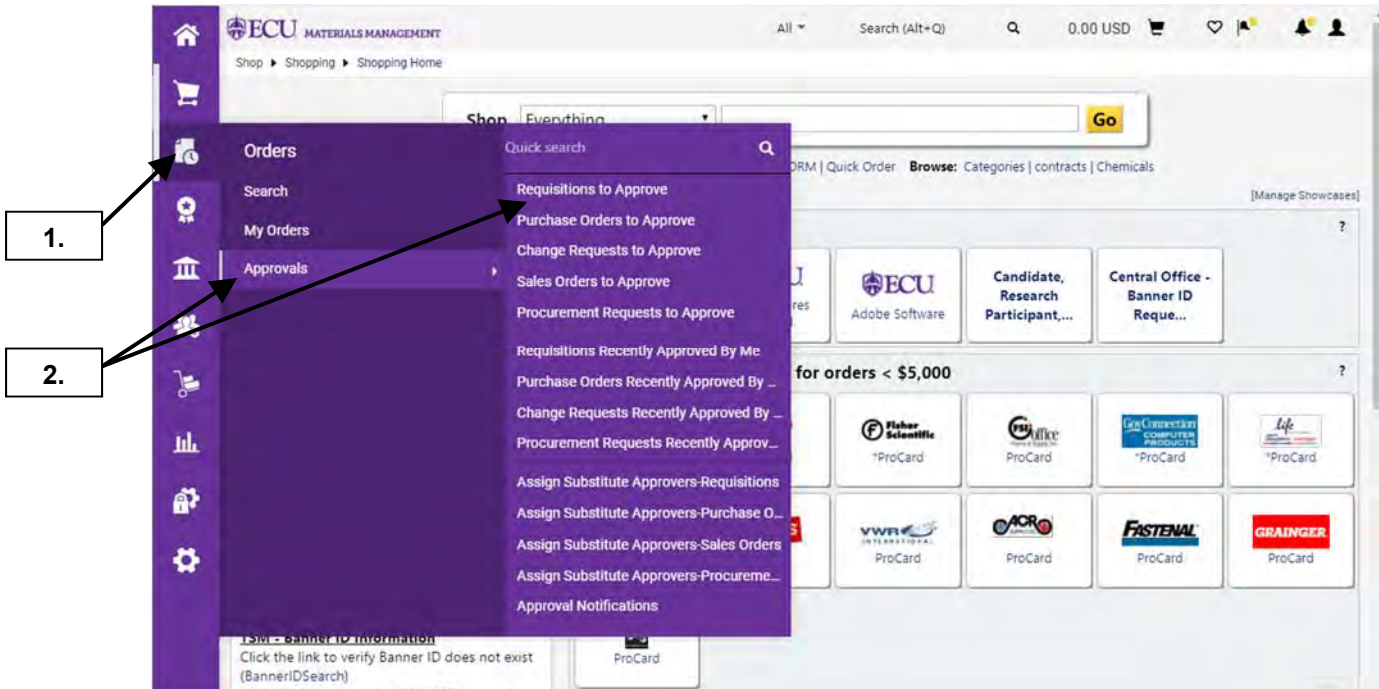
Records found: 1

Bridget Brown [Reply To] [New Comment]
Applies To: Requisition - 2187567
Comment Added - 4/2/2020 1:27 PM
I have to complete a budget transfer before I can approve this requisition.

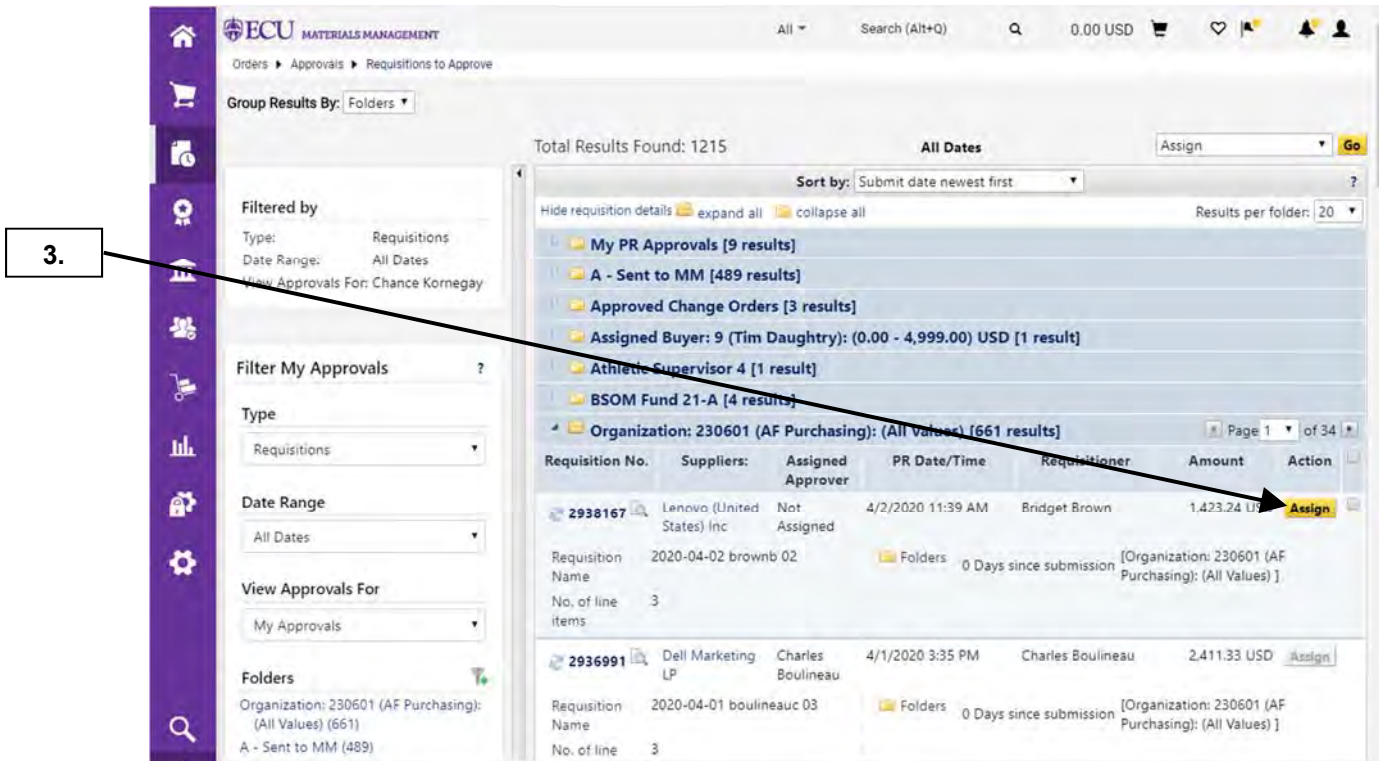
- 10. Notice comment in the **Comments** tab.
- 11. This completes steps for this procedure. Click on **ECU** icon to return to home page.

APPROVAL – COPY ADDRESS FROM HEADER

Last Updated on: 4/02/2020



1. Hover on the **Orders** icon.
2. Hover over **Approvals** and then click on **Requisitions to Approve**.



3. Click on **Assign** button for desired requisition.

APPROVAL – COPY ADDRESS FROM HEADER

Last Updated on: 4/02/2020

ECU MATERIALS MANAGEMENT

Orders > Approvals > Requisitions to Approve

Group Results By: Folders

Total Results Found: 1215

All Dates

Assign Go

Sort by: Submit date newest first

Results per folder: 20

Hide requisition details expand all collapse all

Filtered by

Type: Requisitions
Date Range: All Dates
View Approvals For: Chance Kornegay

Filter My Approvals

Type: Requisitions

Date Range: All Dates

View Approvals For: My Approvals

Folders

Organization: 230601 (AF Purchasing): (All Values) (661)
A - Sent to MM (489)

Requisition No.	Suppliers	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action
2938167	Lenovo (United States) Inc	Chance Kornegay	4/2/2020 11:39 AM	Bridget Brown	1,423.24 USD	Assign
2936991	Dell Marketing LP	Charles Boulineau	4/1/2020 3:35 PM	Charles Boulineau	2,411.33 USD	Assign

Requisition Name: 2020-04-02 brownb 02
No. of line items: 3
0 Days since submission [My PR Approvals]

Requisition Name: 2020-04-01 boulineau 03
No. of line items: 3
0 Days since submission [Organization: 230601 (AF Purchasing): (All Values)]

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4. Note that requisition now shows you as an approver for the requisition.

5. Click on **Requisition #** for approval.

ECU MATERIALS MANAGEMENT

Orders > Approvals > Requisitions to Approve > Summary - Requisition 2938167

< Back to Approvals

1 of 661 Results

Folder: Organization: 230601 (AF Purchasing): (All Values)

Available Actions: Approve/Complete & Show Next Go

Requisition PR Approvals PO Preview Comments Attachments History

Summary General FOAPAL / Ship Codes Supplier Info Taxes/S&H

Hide header

Hide value descriptions

General	Internal Note	Order Info
General Priority: Normal Department: Administration and Finance (Administration and Finance) Prepared by: Bridget Brown Cart Name: 2020-04-02 brownb 02 Accounting Date: Accruals: Bill To East Carolina University Accounts Payable 120 Reade St. Fin. Srv. Bldg. ACCOUNTSPAYABLE@ecu.edu Greenville, NC 27858-4353 United States	Internal Note Business Purpose / Note to Approvers State Exempt: None of the Above Internal Attachments Add Attachments	Order Info Backup Required Pricing Method Pricing Ref # SS Justification Special Instructions Buyer Contact Info Final PR Review ITCS Approval NC Preference VPAT/Accessibility Information Notes to Suppliers Attachments for all suppliers Add Attachments PO Clauses

6. Click on **FOAPAL / Ship Codes** tab to view line item details of requisition.

APPROVAL – COPY ADDRESS FROM HEADER

Last Updated on: 4/02/2020

8.

7.

FOAPAL / Ship Codes

Chart	Fund	Organization	Account	Program	Activity	Location
E	111170	230601	72110	0000		
East Carolina University	AA General Institutional Support	AF Purchasing	Office Supplies	Default Program Code		

Ship To Values vary by line.
Shipping address: Attention: Bridget Brown
Phone: +1 (252) 328-1013
Email: brownb@ecu.edu
East Carolina University
One Card System
Greenville, NC 278584353
United States

Copy to other lines
Ship To Values vary by line.

7. Note link **Copy to other lines**.

8. Scroll down the page to see the different ship codes for the line items.

9.

10.

Line Item	Description	Item Code	Unit	Price	Quantity	Total Price
2	3Y Depot/CCI upgrade from 1Y Depot/CCI	5WS0A14081	EA	99.00	1	99.00 USD
	FOAPAL Codes (same as header)					
	Ship To (same as header)					
3	ThinkPad 45W AC Adapter Slim Tip	0B47030	EA	49.99	1	49.99 USD
	FOAPAL Codes (same as header)					
	Ship To values have been overridden for this line					
	Shipping address: Attention: Jane Doe Phone: +1 252-328-6434 Email: doej@ecu.edu East Carolina University One Card System Greenville, NC 278584353 United States					
	Copy to other lines					

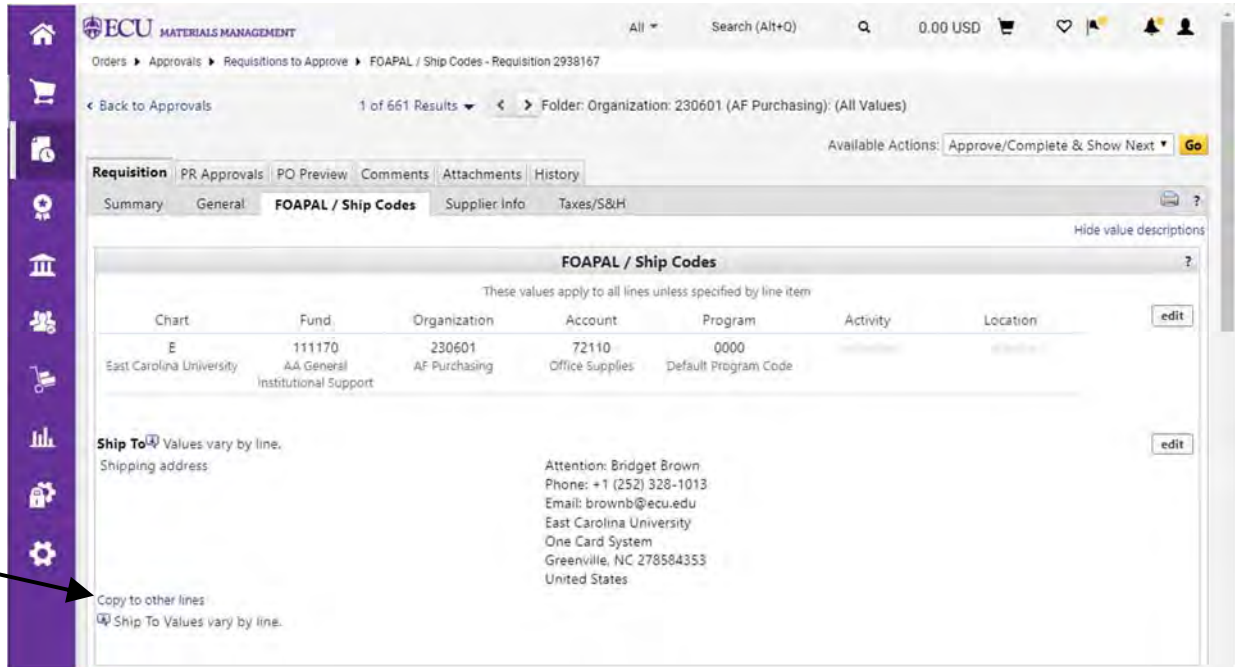
Supplier subtotal 1,423.24

9. Note different ship codes for line items.

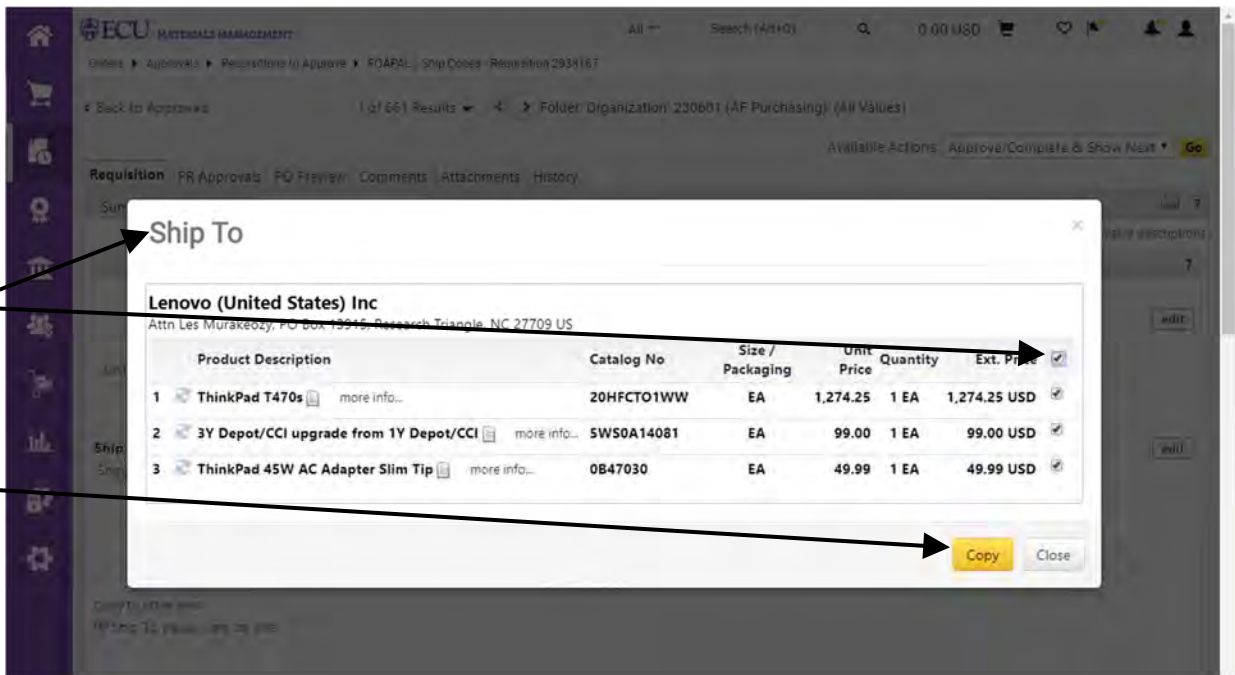
10. Scroll up page. For this example, we will copy header ship code to all line items.

APPROVAL – COPY ADDRESS FROM HEADER

Last Updated on: 4/02/2020



11. Click on **copy to other lines** link.

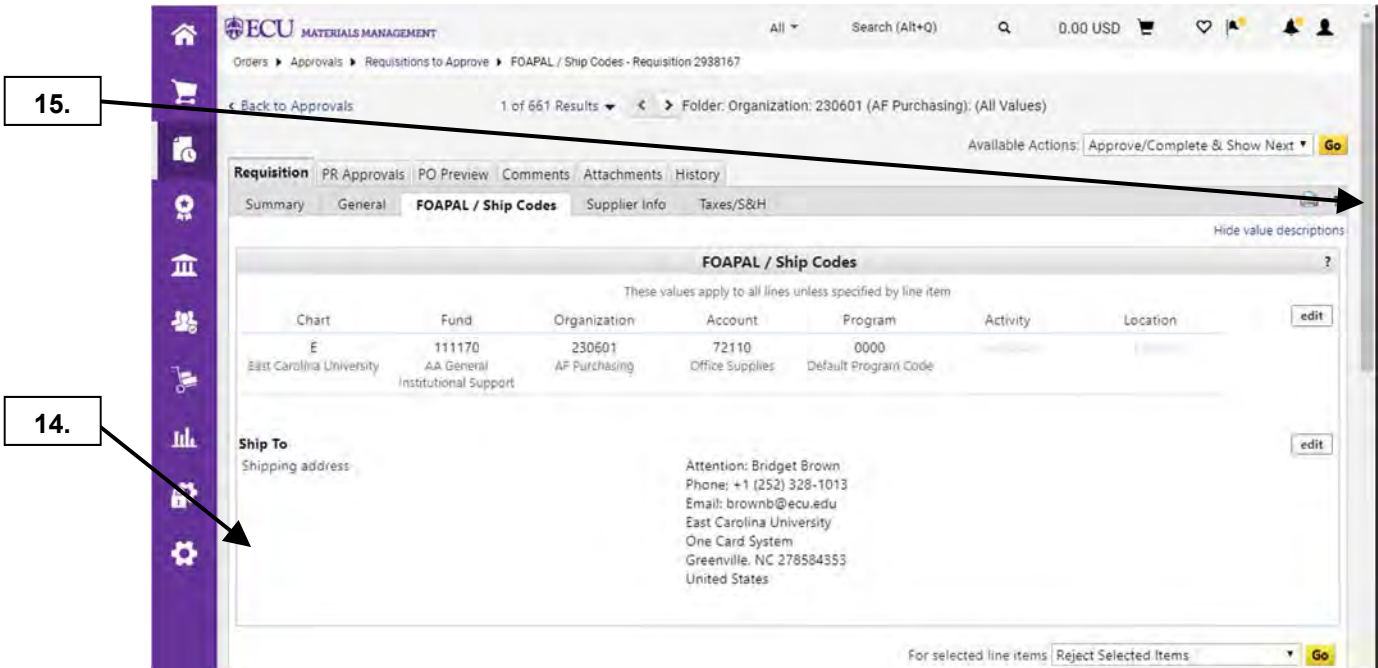


12. Note **Ship To** pop-up window. Click on top check box. This will automatically select all line items to ensure that all items have same ship code. **Note:** You can also just select line items that you want to update with header ship code address.

13. Click **Copy** button.

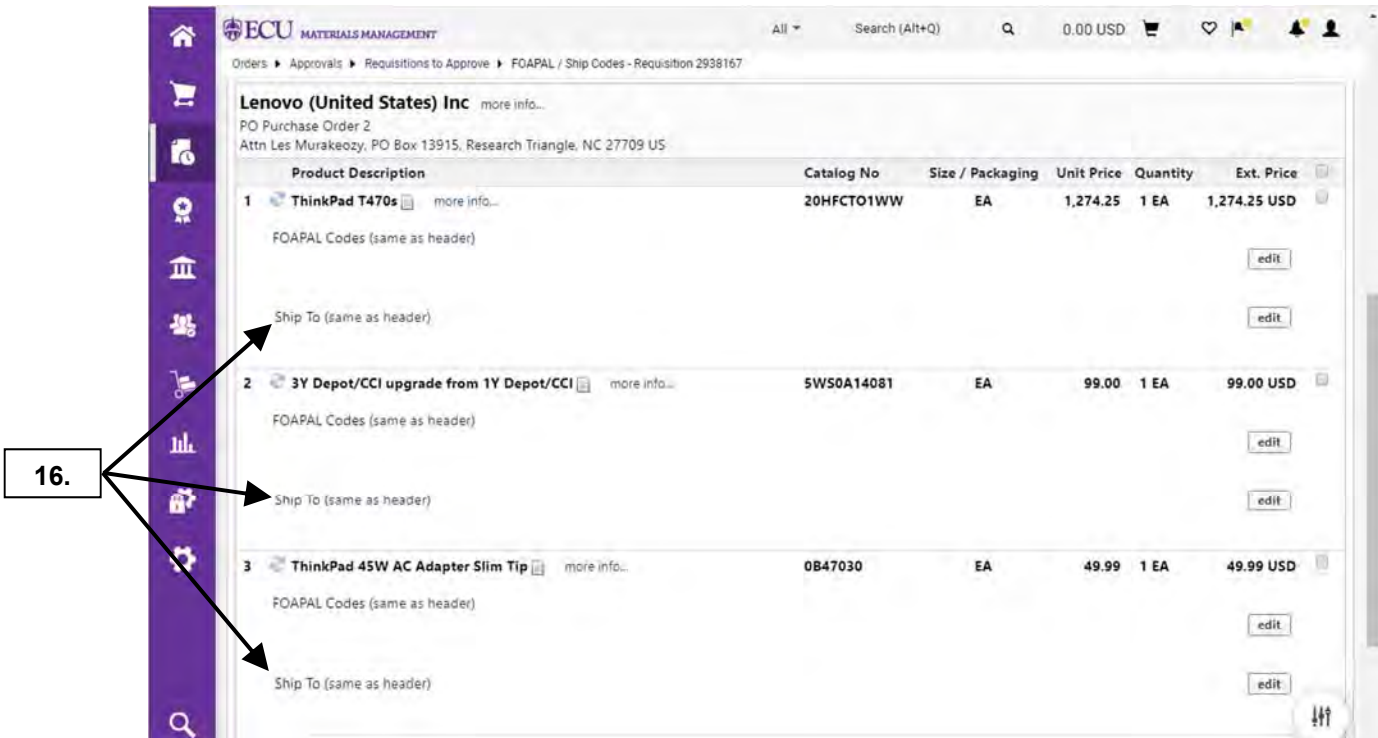
APPROVAL – COPY ADDRESS FROM HEADER

Last Updated on: 4/02/2020



14. The copy to other lines link is no longer visible.

15. Scroll down the page.

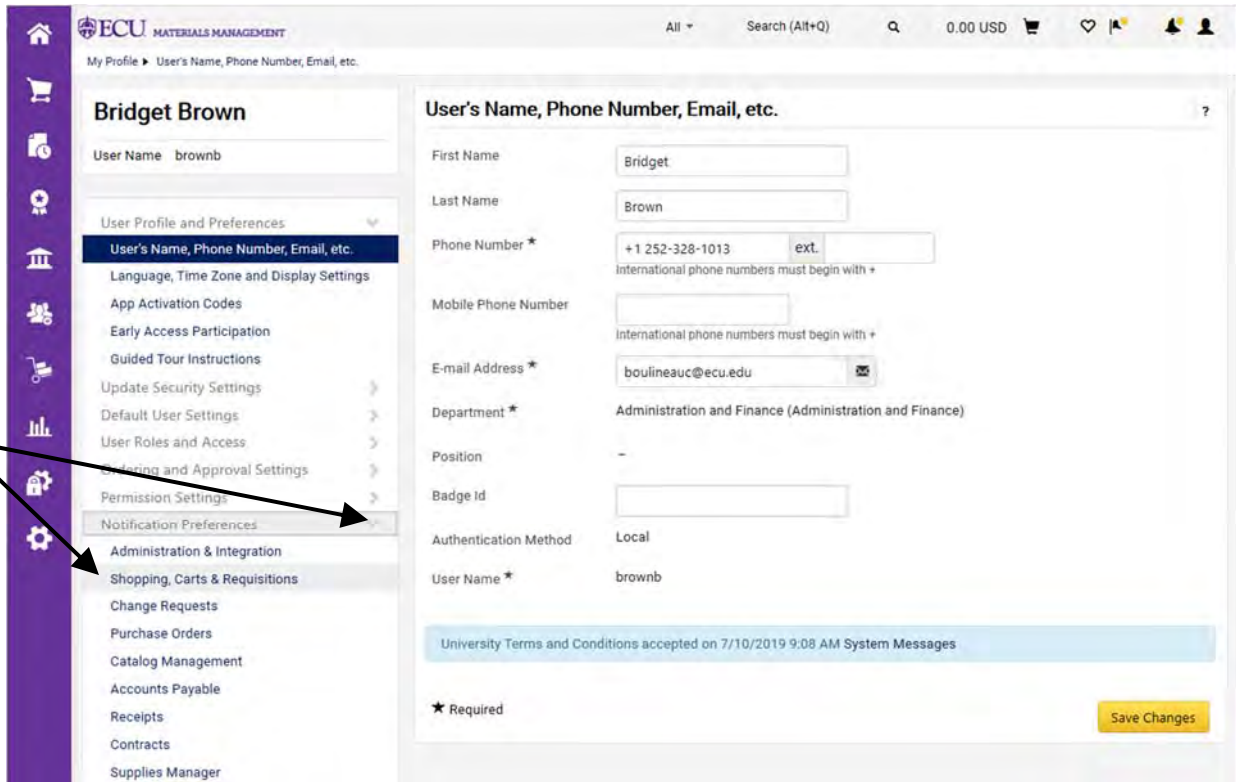


16. Note that all line items have the same ship code as the header.

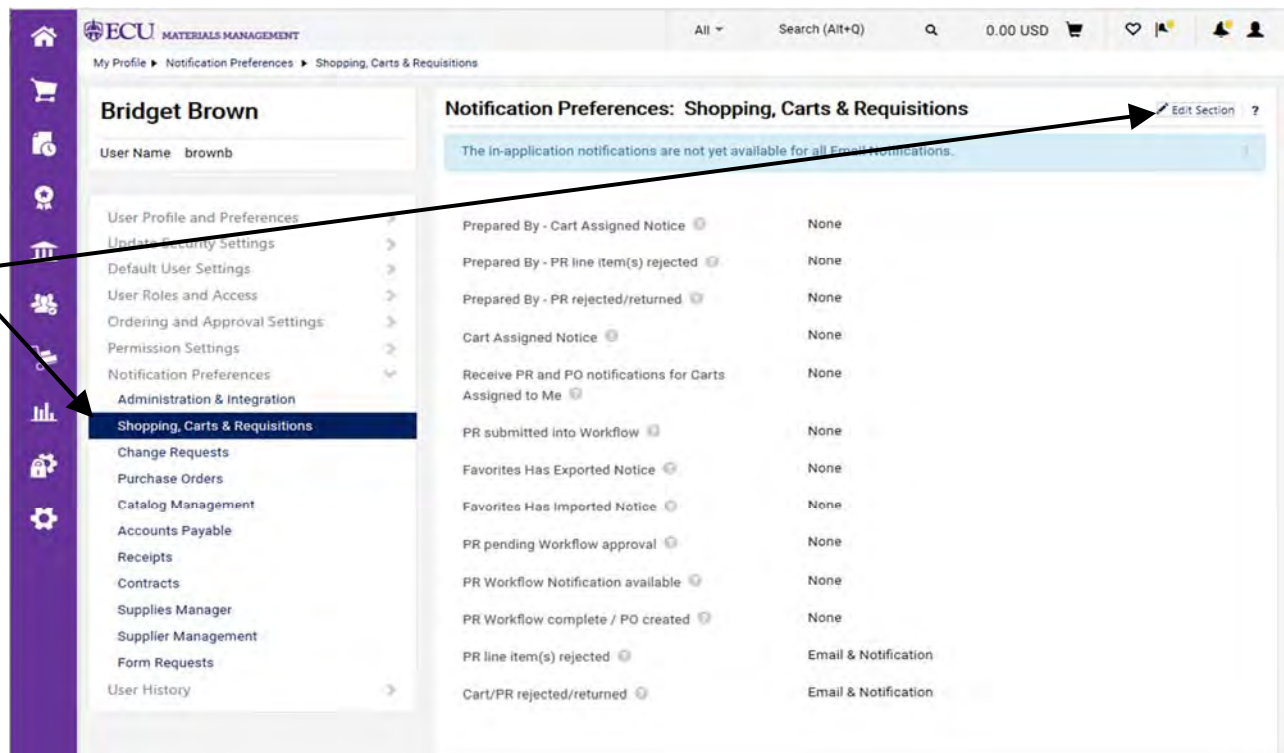
17. This completes steps for this procedure. See Approval procedure to complete processing of requisition.

EMAIL APPROVALS

Last Updated on: 4/02/2020



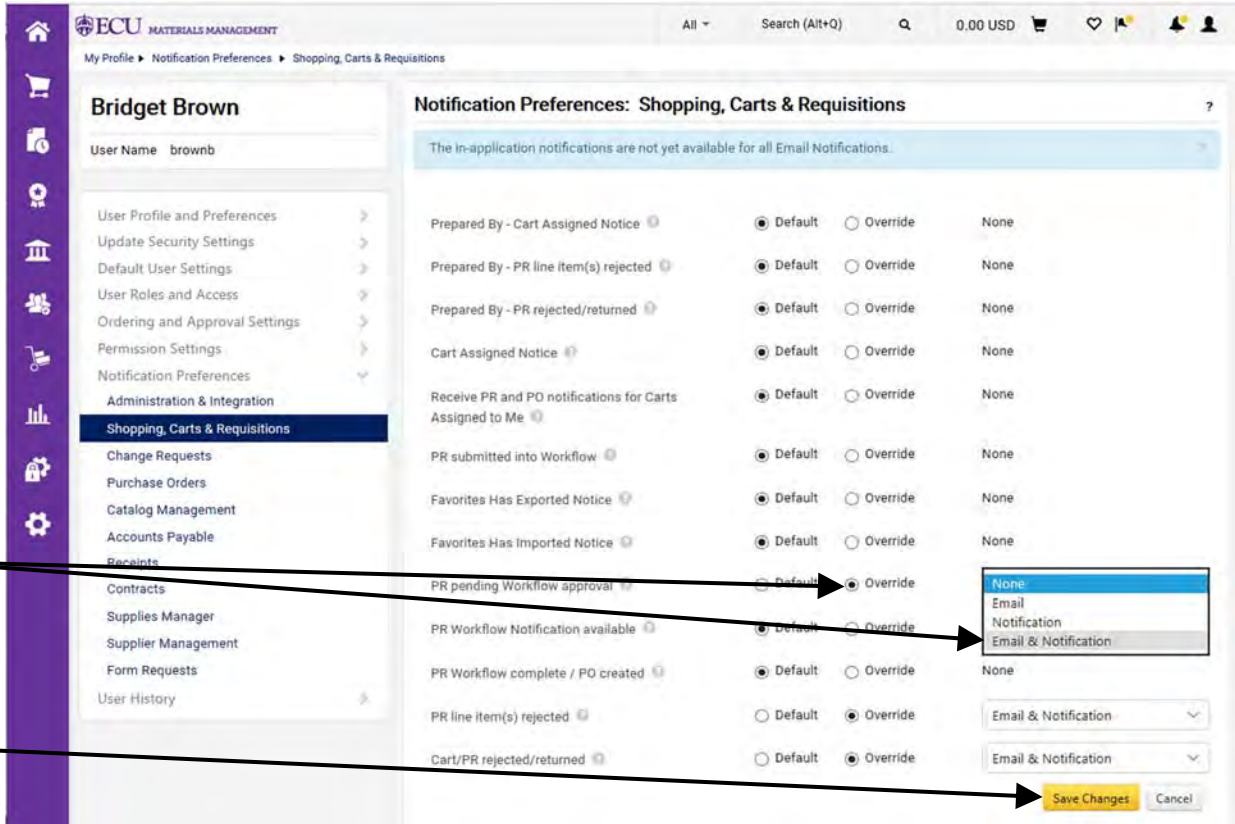
1. To utilize **Email Approvals** feature, you must have **PR pending Workflow approval** email preference set to **Email** or **Email & Notification** within your user profile. Navigate to **Notification Preferences** within your user profile and select **Shopping, Carts & Requisitions** from the expanded menu.



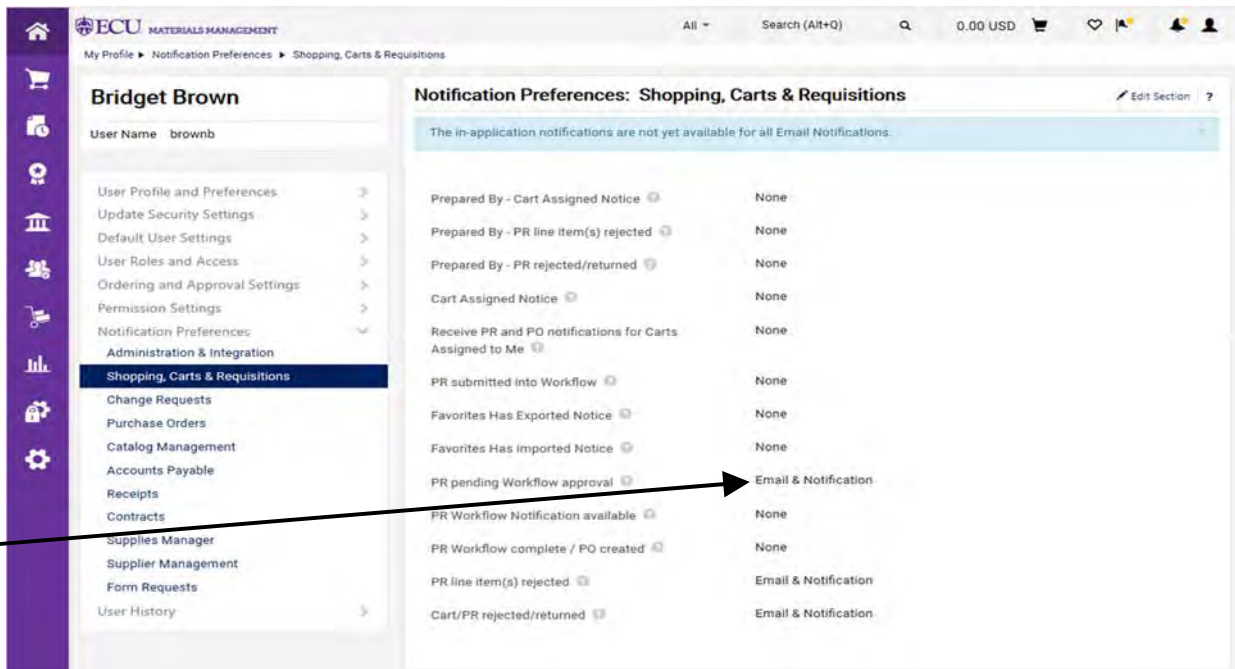
2. Select **Edit Section** to modify notifications for **Shopping, Carts & Requisitions**.

EMAIL APPROVALS

Last Updated on: 4/02/2020



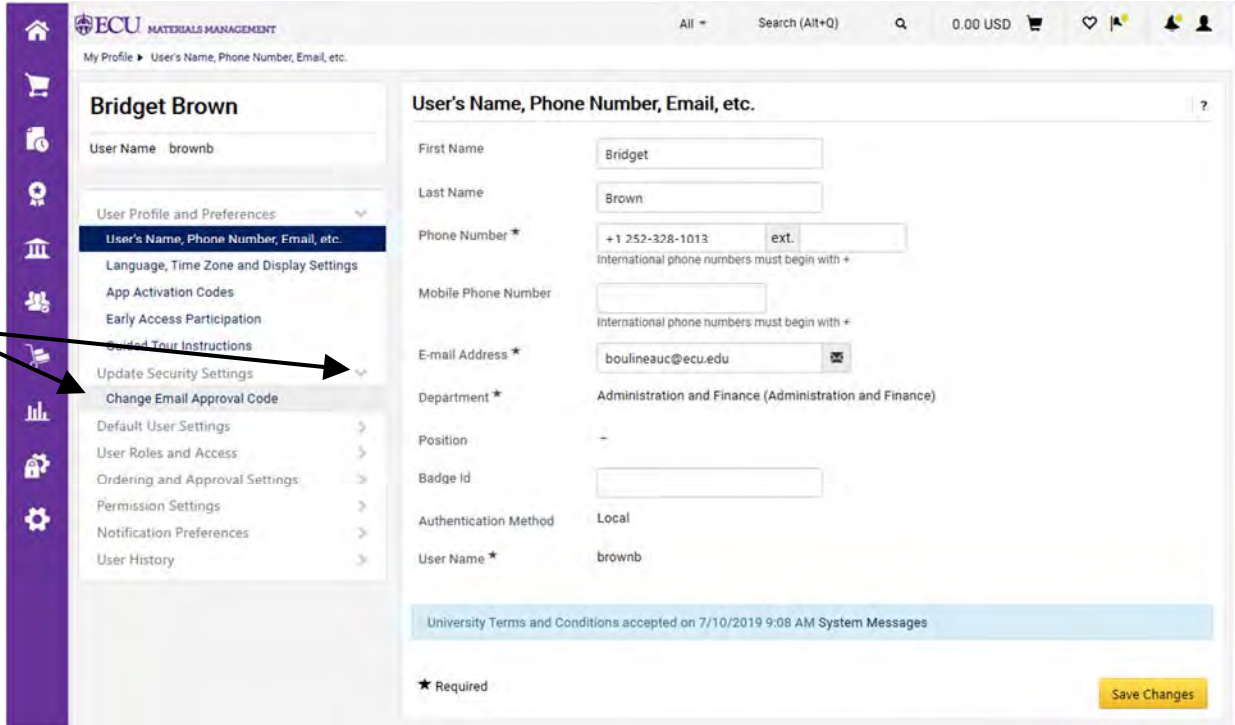
3. Click the **Override** radio button and select **Email & Notification** from the dropdown menu.
4. Click **Save Changes**.



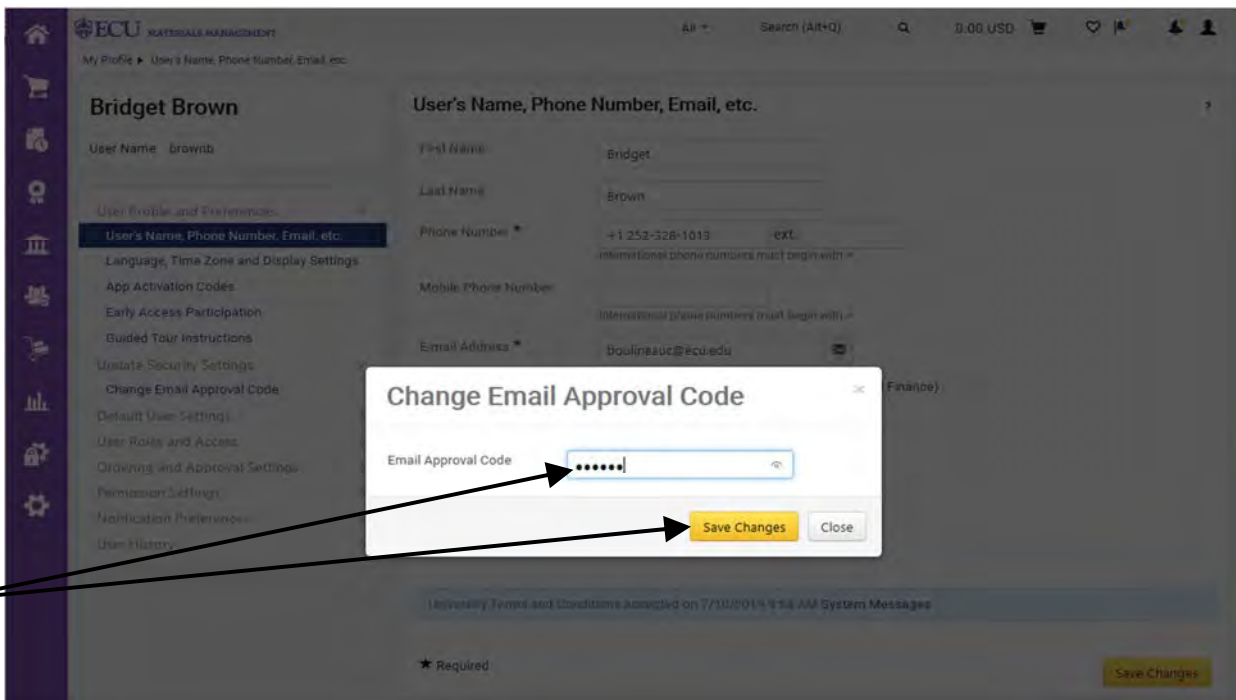
5. Note the saved changes. You will now receive a notification email for requisition approval request.

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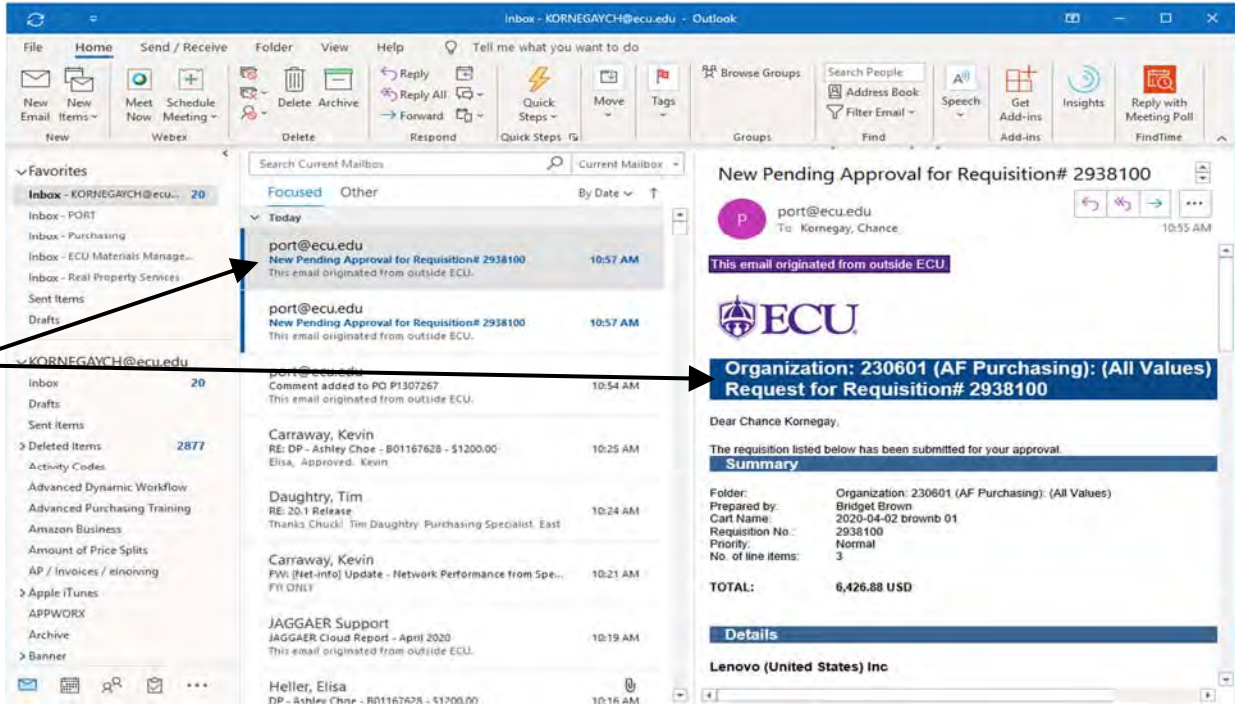
6. Set your Email Approval Code. Navigate to **Update Security Settings** and click on **Change Email Approval Code**.



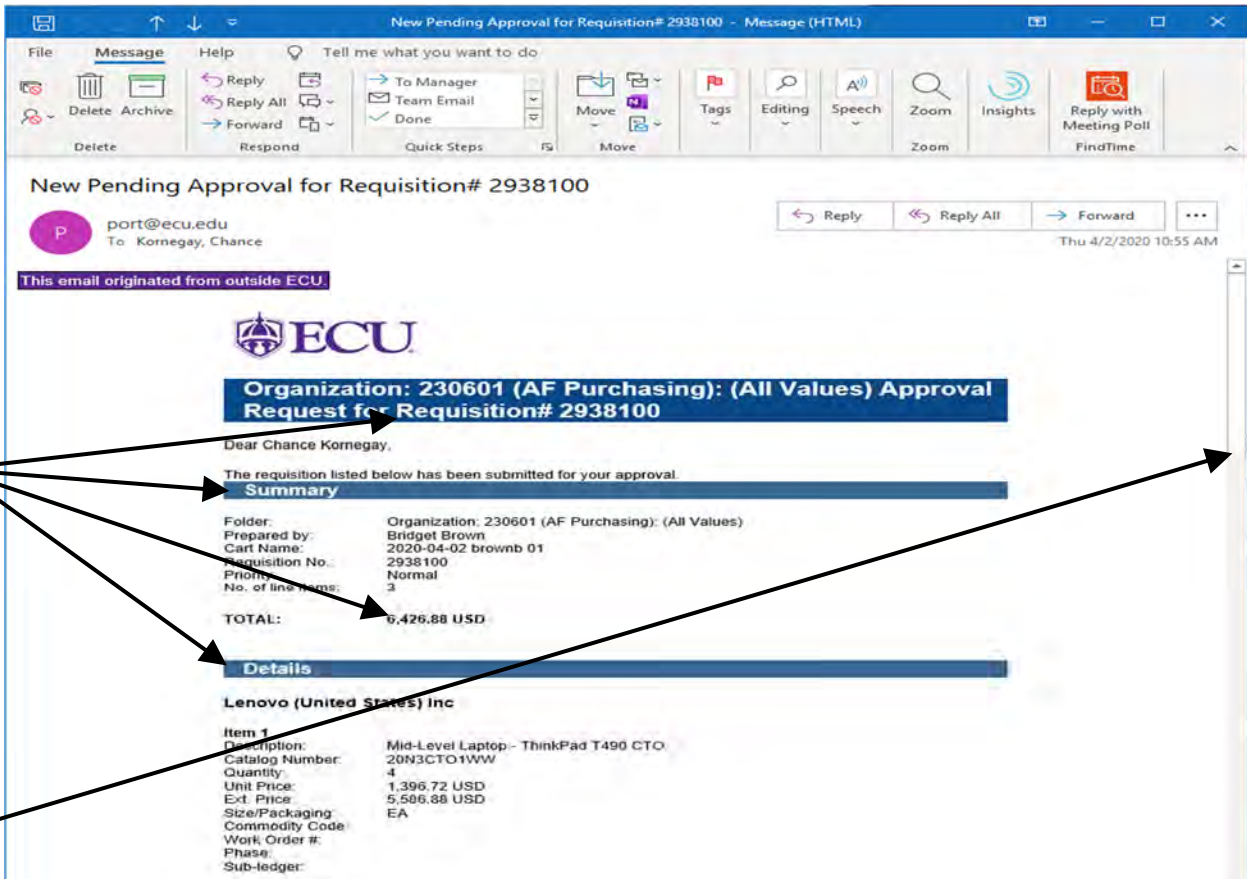
7. Enter a new approval code and click **Save Changes**.
Note: Additional user permission: **Approve/Reject Requisitions via email** is required. Send email request for permission update to PORT@ecu.edu.

EMAIL APPROVALS

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8. Open the PORT enhanced approval email to see details of the requisition and **take action**.

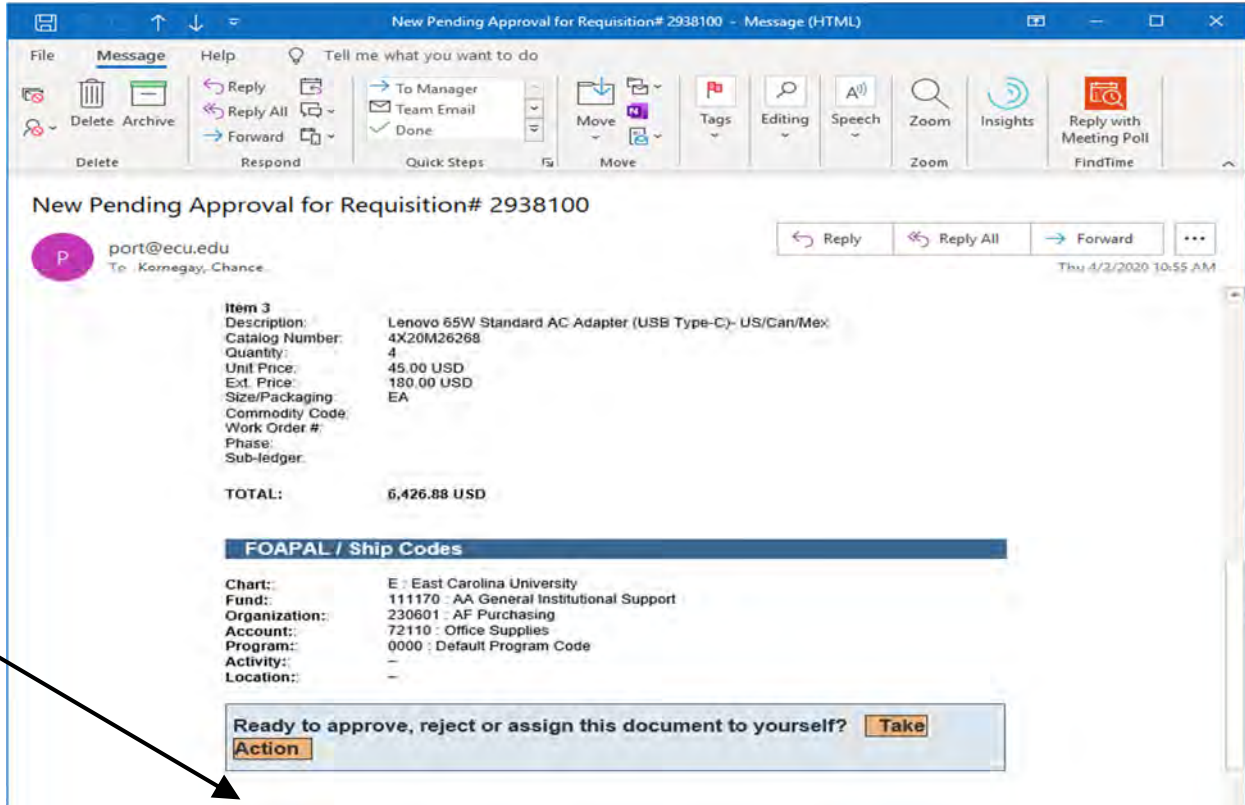


9. Note Summary, Approval Folder, Details, and line item information.

10. Scroll down email to see more details for requisition and **take action**.

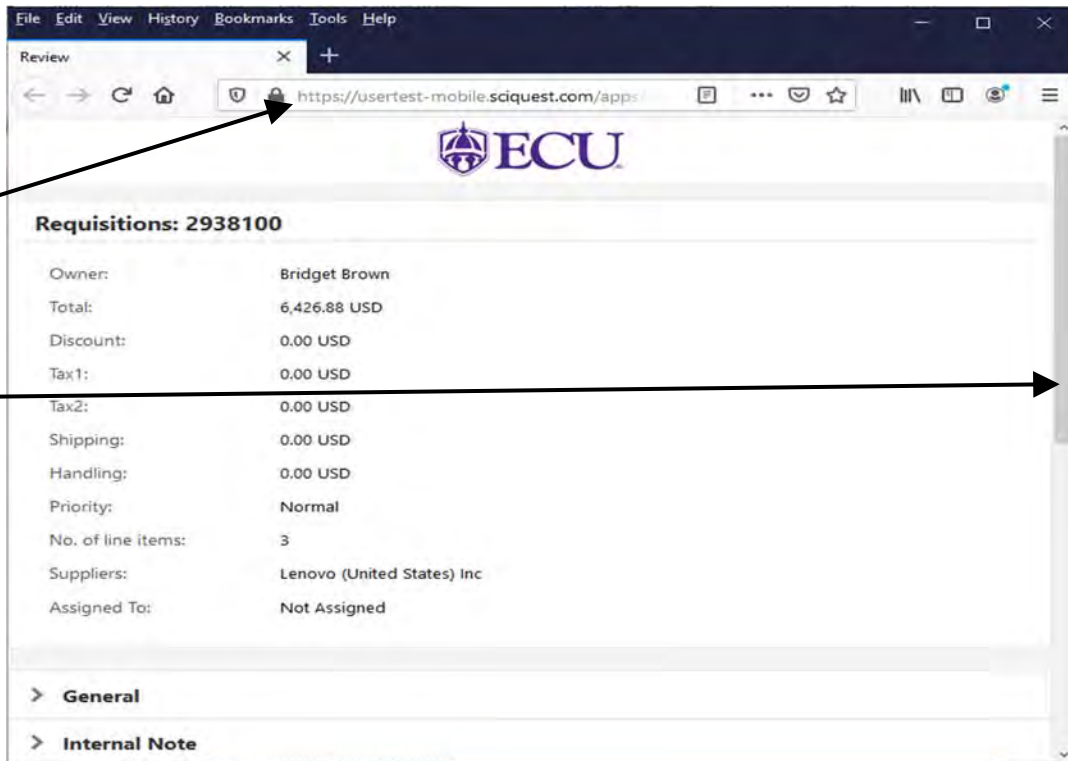
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11.

11. For this example, we will click on the **Take Action** button to approve this requisition.



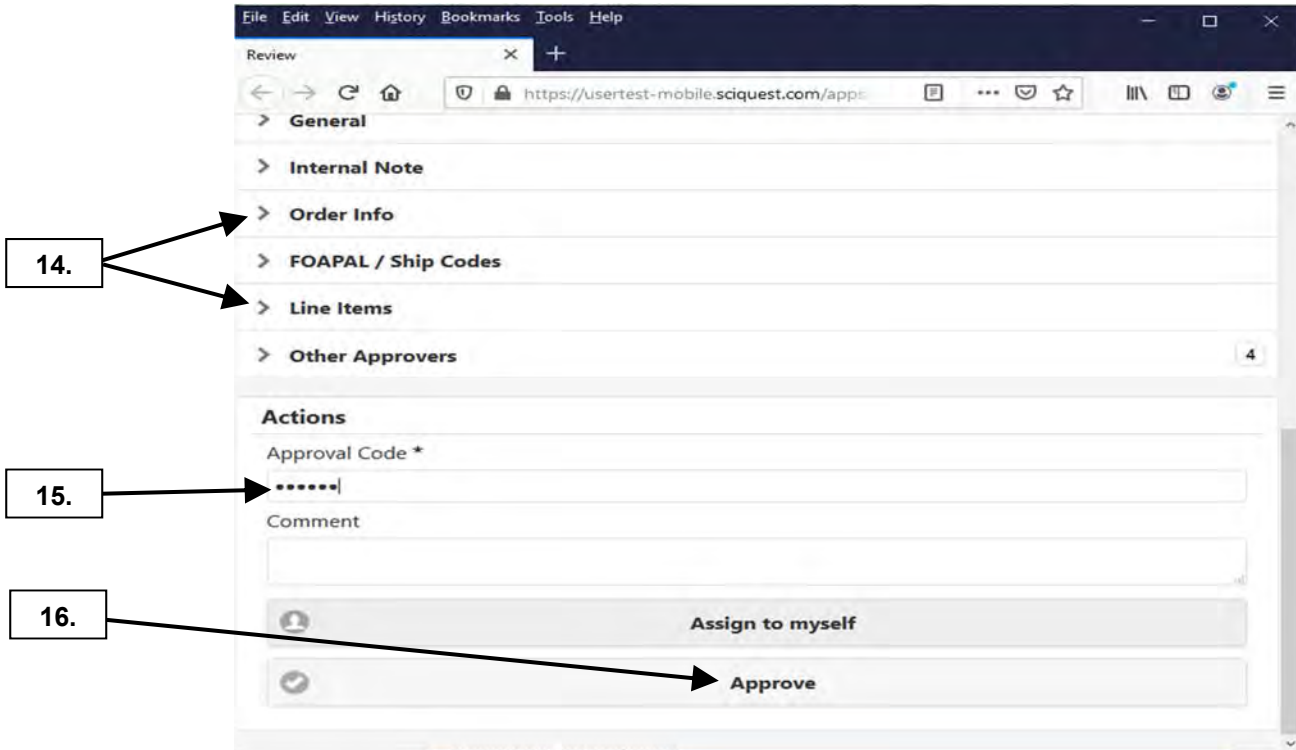
12.

13.

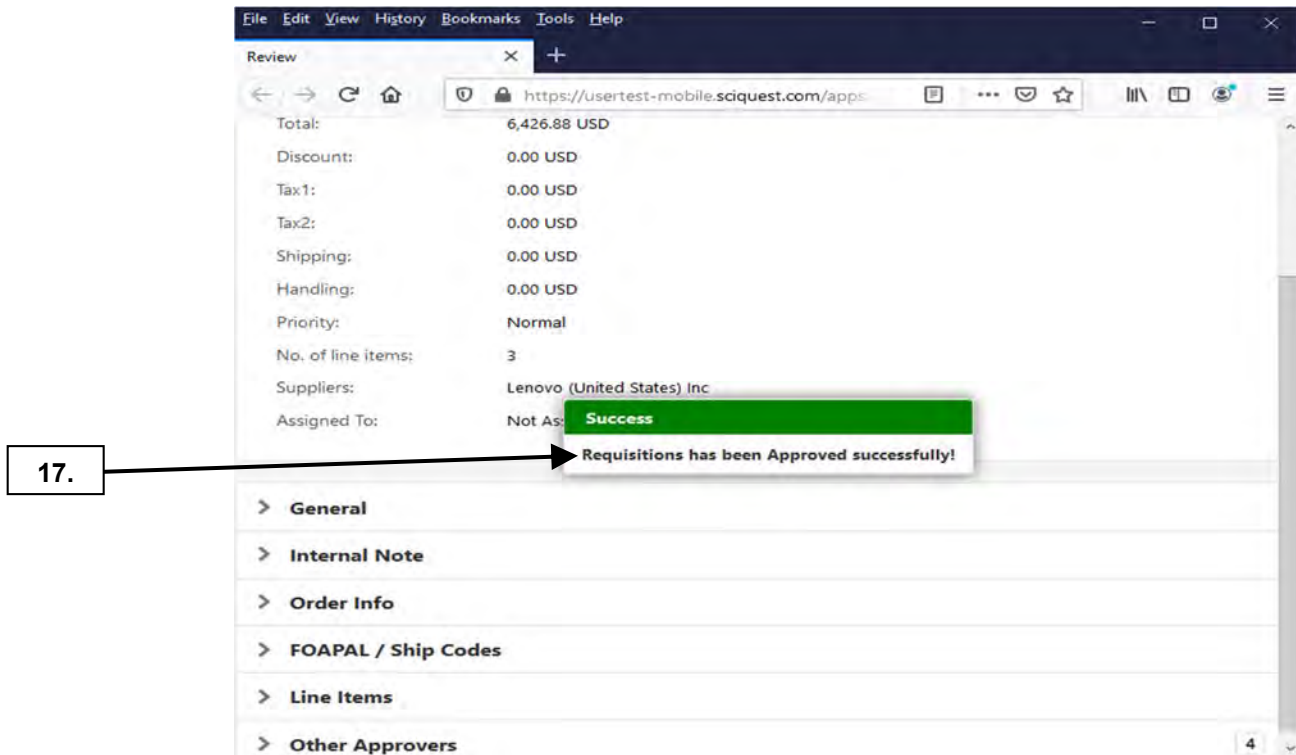
12. A browser window will open with the requisition details.
13. Scroll down to view further details and **take action** on the requisition.

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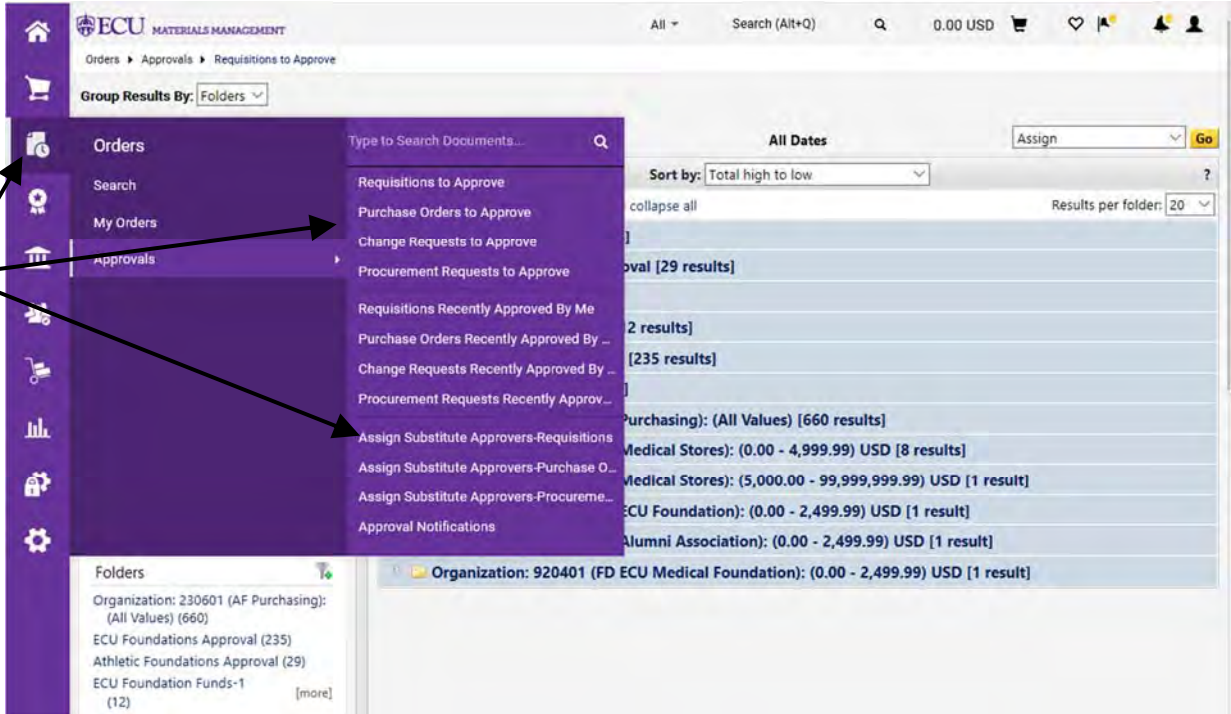
- 14. Use the expansion arrows to review details for the requisition.
- 15. Enter your **Email Approval Code**.
- 16. Click the **Approve** button.



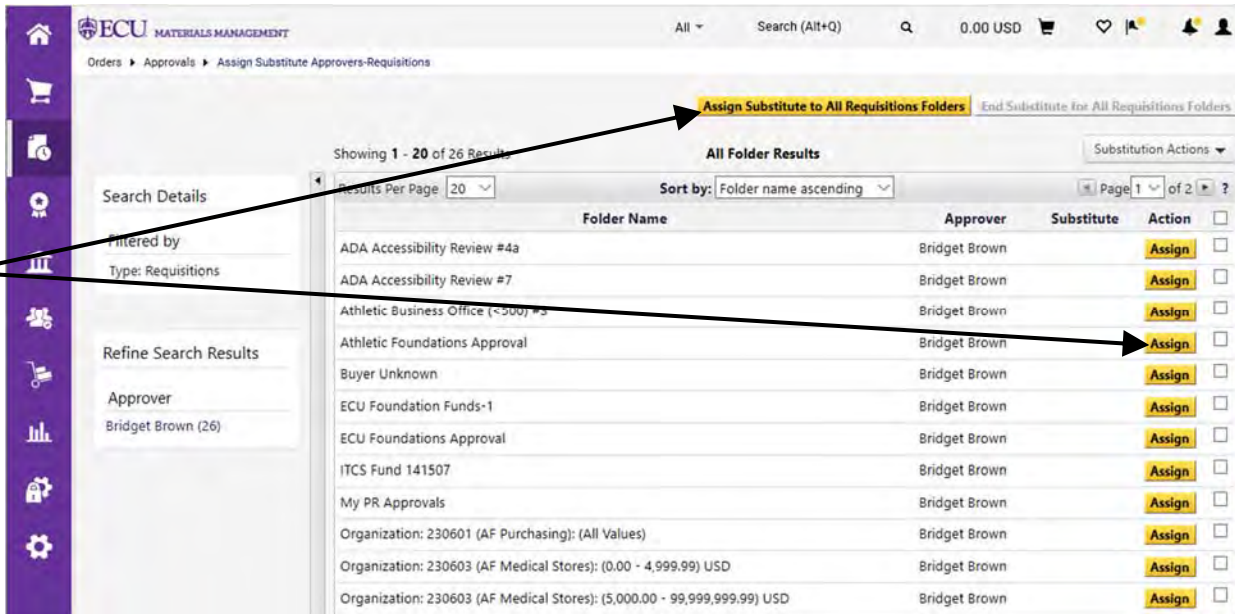
- 17. A **Success** message will display, and the requisition will continue through workflow. This completes the steps for the email approvals procedure.

APPROVALS – ASSIGN SUBSTITUTIONS FOR ALL FOLDERS

Last Updated on: 4/02/2020



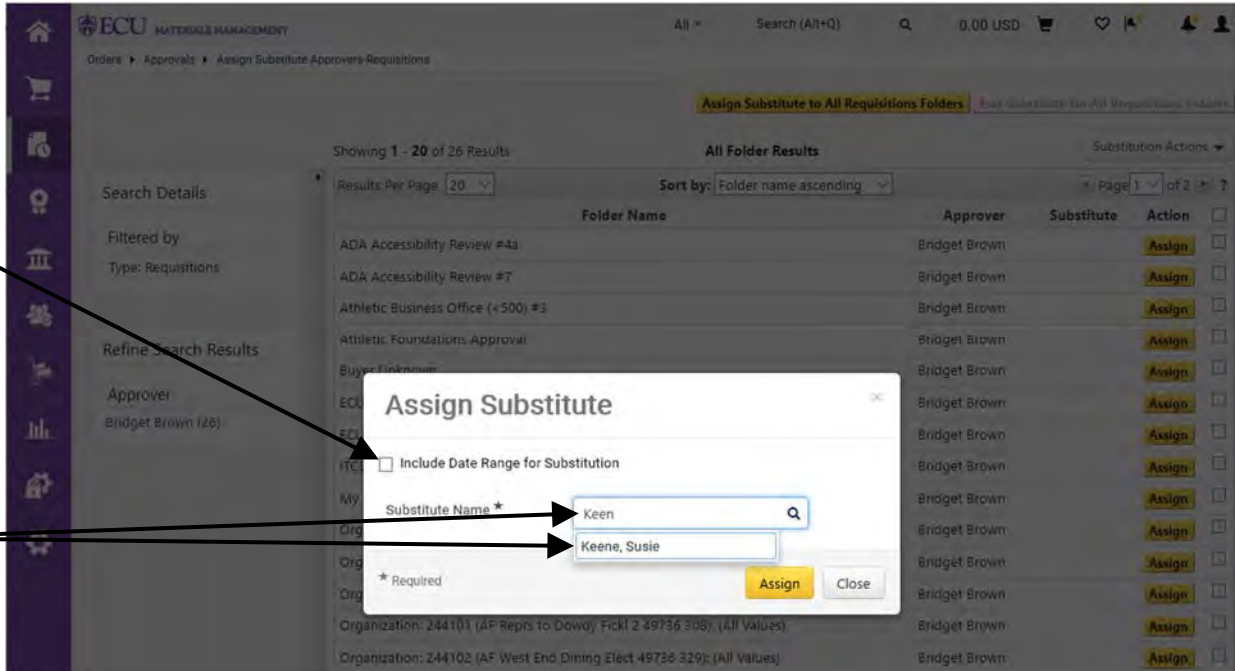
1. Click on the **Orders** icon, hover over **Approvals** and select **Assign Substitute Approvers-Requisitions** link.



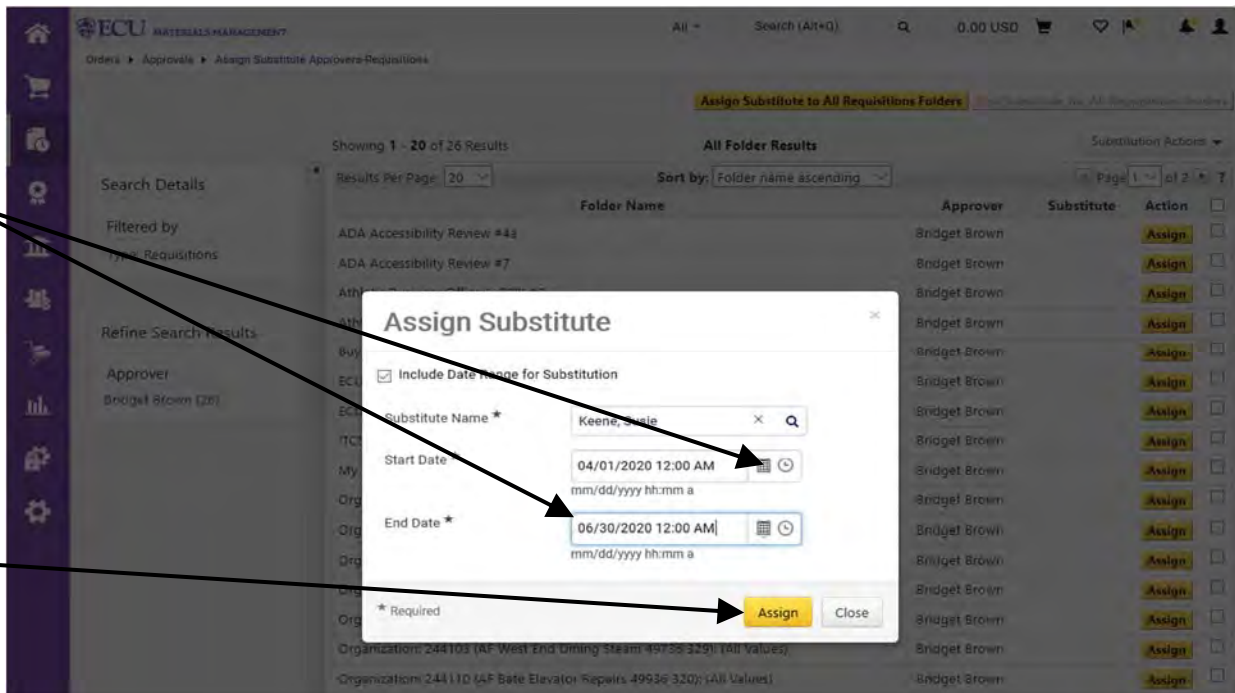
2. Click on **Assign Substitutes to all approval folders** button. **Note:** The same steps can be taken for individual approval folders by click on corresponding **Assign** button or check box.

APPROVALS – ASSIGN SUBSTITUTIONS FOR ALL FOLDERS

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3. Enter an active PORT approver's Last Name in **Substitute Name** field and select when name, username, and email address is displayed.
4. In this example, we click on **Include Date Range for Substitution** check box.



5. Select appropriate datetime for **Start Date** and **End Date** to indicate the length of time that you will assign a substitute approver.
6. Click on **Assign** button.

APPROVALS – ASSIGN SUBSTITUTIONS FOR ALL FOLDERS

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10. Click on the ECU icon in the top left corner to return to the home page.

9. Click on the 'End Substitute for All Requisitions Folders' button at the top right of the table.

8. Click on the 'Remove' button in the Action column for a specific folder.

Folder Name	Approver	Substitute	Action
ADA Accessibility Review #4a	Bridget Brown	Susie Keene Start Date: 04/01/2020 12:00 AM End Date: 06/30/2020 12:00 AM	Remove
ADA Accessibility Review #7	Bridget Brown	Susie Keene Start Date: 04/01/2020 12:00 AM End Date: 06/30/2020 12:00 AM	Remove
Athletic Business Office (<500) #3	Bridget Brown	Susie Keene Start Date: 04/01/2020 12:00 AM End Date: 06/30/2020 12:00 AM	Remove
Athletic Foundations Approval	Bridget Brown	Susie Keene Start Date: 04/01/2020 12:00 AM End Date: 06/30/2020 12:00 AM	Remove

- Note:** If your substitute is already an approver for any of your folders, you will see the appropriate message in a pop-up window.
- The **Substitute** will be listed as an approver for each approval folder.
- When you are ready to end substitution for all approval folders earlier than date specified, click on **End Substitute for All Requisition Folders** button. In addition, you can end substitution early for individual approval folders by clicking on **Remove** button.
- This completes steps for this procedure. Click on **ECU** icon to return to home page.

APPROVALS – FILTERS & SORTING

Last Updated on: 4/02/2020

The screenshot shows the ECU Materials Management interface. The breadcrumb trail is 'Orders > Approvals > Requisitions to Approve'. The 'Group Results By' is set to 'Folders'. The 'Total Results Found' is 957. The 'Sort by' is 'Folder Entry date newest first'. The 'Results per folder' is 20. The list of folders includes: My PR Approvals [8 results], Athletic Foundations Approval [29 results], Buyer Unknown [8 results], ECU Foundation Funds-1 [12 results], ECU Foundations Approval [235 results], ITCS Fund 141507 [1 result], Organization: 230601 (AF Purchasing): (All Values) [660 results], Organization: 230603 (AF Medical Stores): (0.00 - 4,999.99) USD [8 results], Organization: 230603 (AF Medical Stores): (5,000.00 - 99,999,999.99) USD [1 result], Organization: 920101 (FD ECU Foundation): (0.00 - 2,499.99) USD [1 result], Organization: 920301 (FD Alumni Association): (0.00 - 2,499.99) USD [1 result], and Organization: 920401 (FD ECU Medical Foundation): (0.00 - 2,499.99) USD [1 result]. A box labeled '1.' points to the 'Organization: 230601 (AF Purchasing): (All Values) [660 results]' folder.

1. Click on one of approval folders to view listing of requisitions.

The screenshot shows the ECU Materials Management interface with the 'Requisition Details' page for 'Organization: 230601 (AF Purchasing): (All Values) [660 results]'. The breadcrumb trail is 'Orders > Approvals > Requisitions to Approve'. The 'Group Results By' is set to 'Folders'. The 'Total Results Found' is 957. The 'Sort by' is 'Folder Entry date newest first'. The 'Results per folder' is 20. The table shows the following requisitions:

Requisition No.	Suppliers:	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action
2936991	Dell Marketing LP	Charles Boulineau	4/1/2020 3:35 PM	Charles Boulineau	2,411.33 USD	Assign
2932608	Dell Marketing LP	Not Assigned	3/29/2020 8:18 PM	Charles Boulineau	103,200.00 USD	Assign
2932463	Dell Marketing LP	Not Assigned	3/29/2020 8:17 PM	Charles Boulineau	11,200.00 USD	Assign

A box labeled '2.' points to the filter sidebar on the left. The filter sidebar includes: Filtered by (Type: Requisitions, Date Range: All Dates, View Approvals For: Bridget Brown), Filter My Approvals (Type: Requisitions, Date Range: All Dates, Folders: Organization: 230601 (AF Purchasing): (All Values) (660), ECU Foundations Approval (235), Athletic Foundations Approval (29), ECU Foundation Funds-1 (12)), Priority (Normal (965)), and Supplier (Dell Marketing LP (441), Govconnection Inc (167), CDWG LLC (55), Life Technologies Corp (53)).

2. Note filters available for refining your searches in your approval queues: **Date, Priority, Supplier, Prepared by, Form Type, Custom Fields, Current Workflow Step, State, Department, Assigned Approver, Prepared For, and Status Flags.** This will require scrolling to see remaining filters.

APPROVALS – FILTERS & SORTING

Last Updated on: 4/02/2020

Requisition No.	Supplier	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action
2936991	Dell Marketing LP	Charles Boulineau	4/1/2020 3:35 PM	Charles Boulineau	2,411.33 USD	Assign
2932608	Dell Marketing LP	Not Assigned	3/29/2020 8:18 PM	Charles Boulineau	103,200.00 USD	Assign
2932463	Dell Marketing LP	Not Assigned	3/29/2020 8:17 PM	Charles Boulineau	11,200.00 USD	Assign
2927721	Dell Marketing LP	Not Assigned	3/24/2020 12:51 PM	Charles Boulineau	11,200.00 USD	Assign
2927596	Example Supplier 20.1	Not Assigned	3/24/2020 11:43 AM	Chance Kornegay	10,000.00 USD	Assign

3. For 1st filter, select **Non-Catalog Form** under **Form Type** filter.

Total Results Found: 754

Group Results By: Folders

Filtered by:

- Type: Requisitions
- Date Range: All Dates
- View Approvals For: Bridget Brown
- Form Type: Non-Catalog Form

Sort by: Folder Entry date newest first

Results per folder: 20

Requisition No.	Suppliers	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action
2932608	Dell Marketing LP	Not Assigned	3/29/2020 8:18 PM	Charles Boulineau	103,200.00 USD	Assign
2932463	Dell Marketing LP	Not Assigned	3/29/2020 8:17 PM	Charles Boulineau	11,200.00 USD	Assign
2927721	Dell Marketing LP	Not Assigned	3/24/2020 12:51 PM	Charles Boulineau	11,200.00 USD	Assign
2927596	Example Supplier 20.1	Not Assigned	3/24/2020 11:43 AM	Chance Kornegay	10,000.00 USD	Assign

4. Note that **Total Results Found** has been update based on filter.

5. For the 2nd filter, click on **add filter** icon for **Supplier**.

APPROVALS – FILTERS & SORTING

Last Updated on: 4/02/2020

The screenshot shows the 'Refine Search Results' dialog box with the following suppliers listed:

- 18.2 Test Tri Outfitters (2)
- ACR Supply Co Inc (1)
- Apple Inc (1)
- Aramark Corp (1)
- Bio-Rad Labs (11)
- CDWG LLC (34)
- Dan Andrews Lawn Serv Inc (1)
- Dell Marketing LP (403)
- Dell Software Inc (3)
- Example Supplier 19.3 (2)
- Example Supplier 20.1 (2)
- Ferguson Enterprises Inc (2)
- Fisher Sci Co (5)
- Fisher Scientific Company, LLC (1)
- Govconnection Inc (139)
- Greenville Utilities Comm (13)
- Hastings Ford Inc (14)
- Henry Schein Inc (29)
- Life Technologies Corp (49)
- Mike's Auto Repair (3)
- Ready Mixed Concrete Co (1)
- Shred-it US JV LLC (2)
- Staples Inc (1)
- VWR Intl (28)
- Williamson Surfboards de France (1)

6. Select desired suppliers for filter. **Note:** This option will allow multiple selections.
7. Click **Save** button.

The screenshot shows the 'Filtered by' section with the following filters applied:

- Supplier:** Dell Marketing LP
- Form Type:** Non-Catalog Form

The 'Date Range' dropdown menu is open, showing options such as 'All Dates', 'Custom Date Range', 'Before X Date', 'After X Date', 'Last X Days', 'Next X Days', 'Before the Last X Days', 'After the Last X Days', 'From X Days Through Y Days Ago', 'Days', 'Last 7 days', 'Last 30 days', 'Last 60 days', 'Last 90 days', 'Last 120 days', 'Yesterday', 'Today', 'Last Week', 'This Week', and 'Calendar'.

Requisition No.	Suppliers	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action
2932608	Dell Marketing LP	Not Assigned	3/29/2020 8:18 PM	Charles Boulineau	103,200.00 USD	Assign
2932463	Dell Marketing LP	Not Assigned	3/29/2020 8:17 PM	Charles Boulineau	11,200.00 USD	Assign
2927721	Dell Marketing LP	Not Assigned	3/24/2020 12:51 PM	Charles Boulineau	11,200.00 USD	Assign

8. Note **Total Results Found** has been updated based on filter.
9. For last filter, click **Date Range** combo box and select an appropriate range.

APPROVALS – FILTERS & SORTING

Last Updated on: 4/02/2020

The screenshot shows the 'Approvals' page in the ECU Materials Management system. The page is filtered by 'Requisitions' and 'Last 60 days'. The 'Sort by' dropdown menu is open, showing options: 'Requisition Number Descending', 'Requisition Number Ascending', 'Submit date newest first', 'Submit date oldest first', 'Folder Entry date newest first', 'Folder Entry date oldest first', 'Total high to low', and 'Total low to high'. The 'Total Results Found' is 36. The table below shows requisitions for 'Organization: 230601 (AF Purchasing): (All Values) [35 results]'. The table has columns: Requisition No., Suppliers, Assigned Approver, PR Date/Time, Requisitioner, Amount, and Action.

Requisition No.	Suppliers	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action
2932608	Dell Marketing LP	Not Assigned	3/29/2020 8:18 PM	Charles Boulineau	103,200.00 USD	Assign
2932463	Dell Marketing LP	Not Assigned	3/29/2020 8:17 PM	Charles Boulineau	11,200.00 USD	Assign

- 10. Note **Total Results Found** has been updated based on filter.
- 11. Select the **Sort by** combo box and note options for sorting your approvals.
- 12. For this final example, we will select **Total high to low**.

The screenshot shows the 'Approvals' page with requisitions sorted by 'Total high to low'. The 'Total Results Found' is 36. The table below shows requisitions for 'Organization: 230601 (AF Purchasing): (All Values) [35 results]'. The table has columns: Requisition No., Suppliers, Assigned Approver, PR Date/Time, Requisitioner, Amount, and Action.

Requisition No.	Suppliers	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action
2932608	Dell Marketing LP	Not Assigned	3/29/2020 8:18 PM	Charles Boulineau	103,200.00 USD	Assign
2927721	Dell Marketing LP	Not Assigned	3/24/2020 12:51 PM	Charles Boulineau	11,200.00 USD	Assign
2932463	Dell Marketing LP	Not Assigned	3/29/2020 8:17 PM	Charles Boulineau	11,200.00 USD	Assign
2887915	Dell Marketing LP	Not Assigned	2/10/2020 1:12 PM	Charles Boulineau	2,981.22 USD	Assign

- 13. Notice the requisitions are now sorted from highest amount to lowest amount.
- 14. This completes steps for this procedure. Click on **ECU** icon to return to home page.