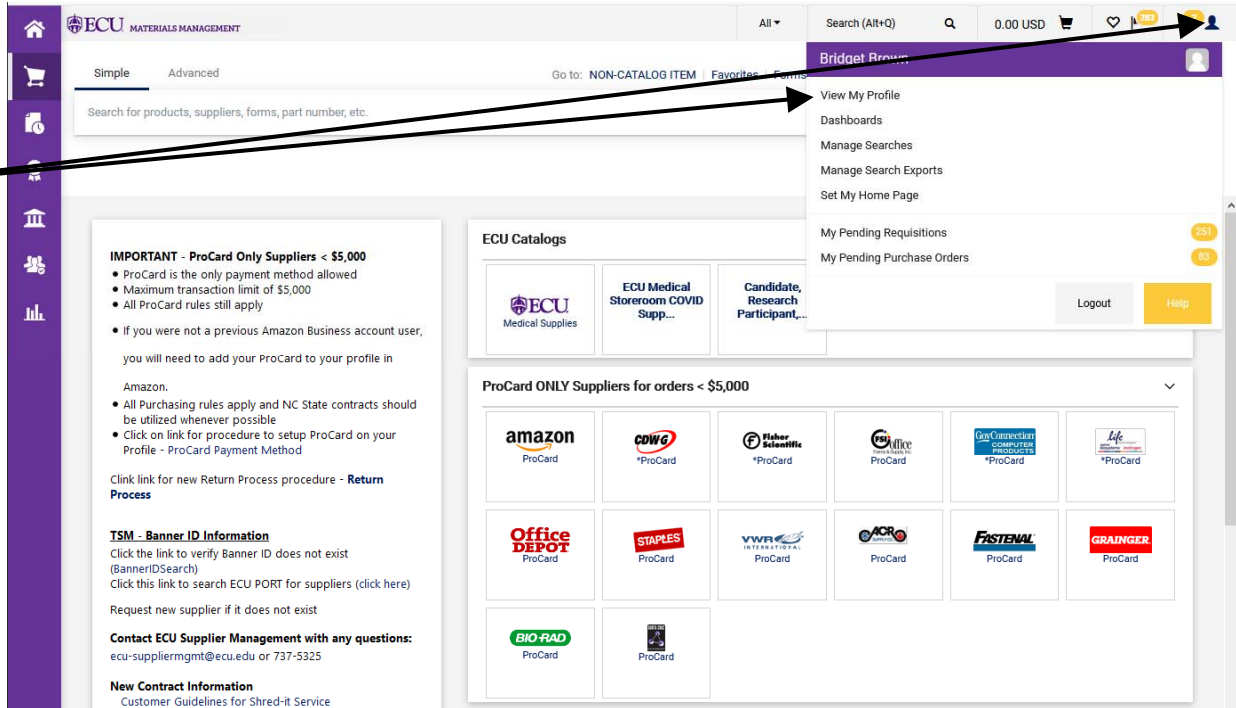
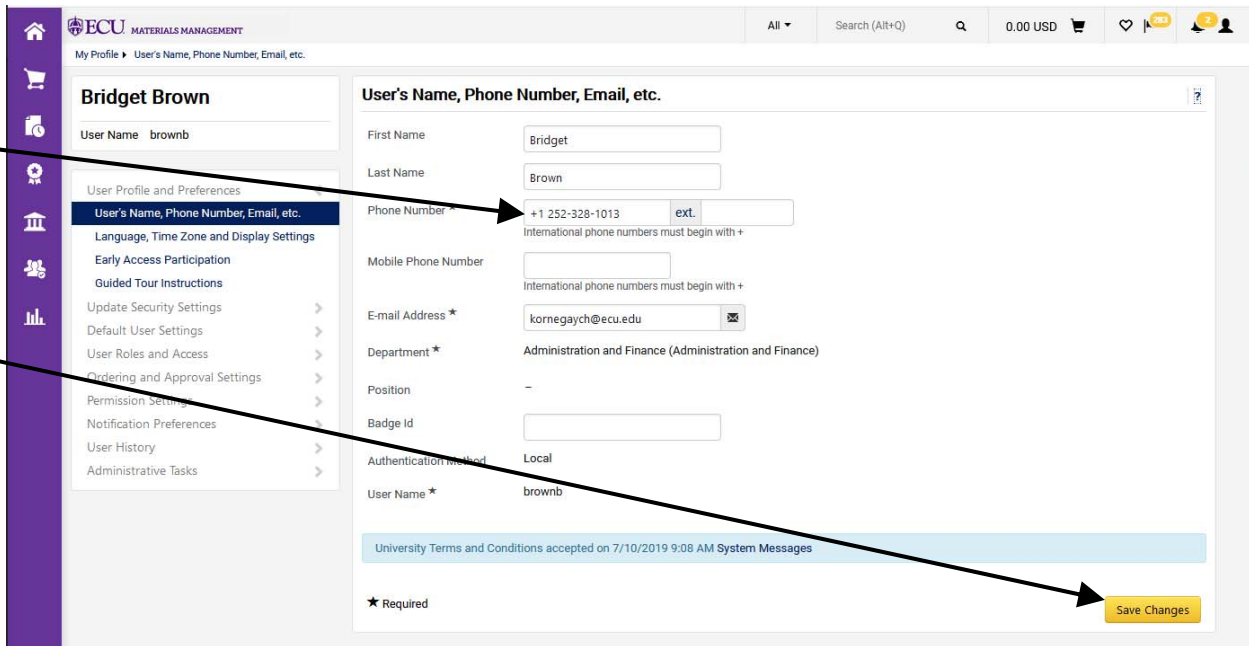


USER PROFILE EDITS

Last Updated on: 5/14/2021



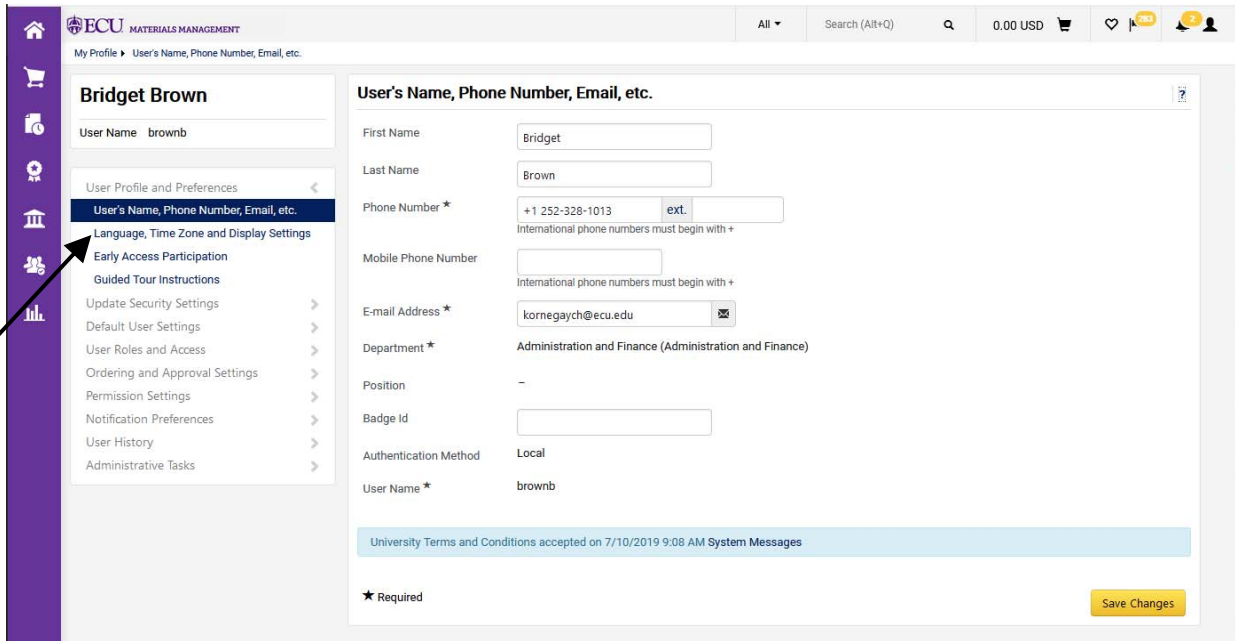
1. Click on the **User** icon in the top right corner and select **View My Profile** from fly-out menu.



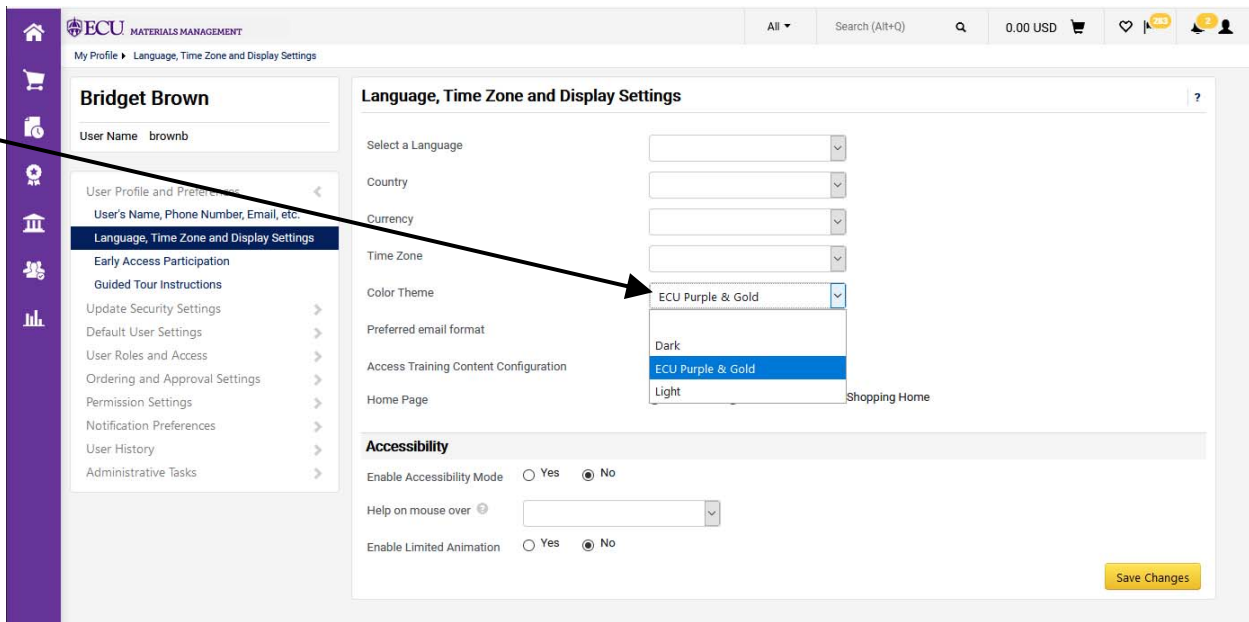
2. Enter **Area Code** and **Phone #** in the corresponding box.
3. Click **Save Changes** button. **IMPORTANT NOTE:** If you change departments / divisions, it is **critical** that you submit a new Banner Security Form indicating any change with your roles and Organization permissions. Once the security 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: 5/14/2021



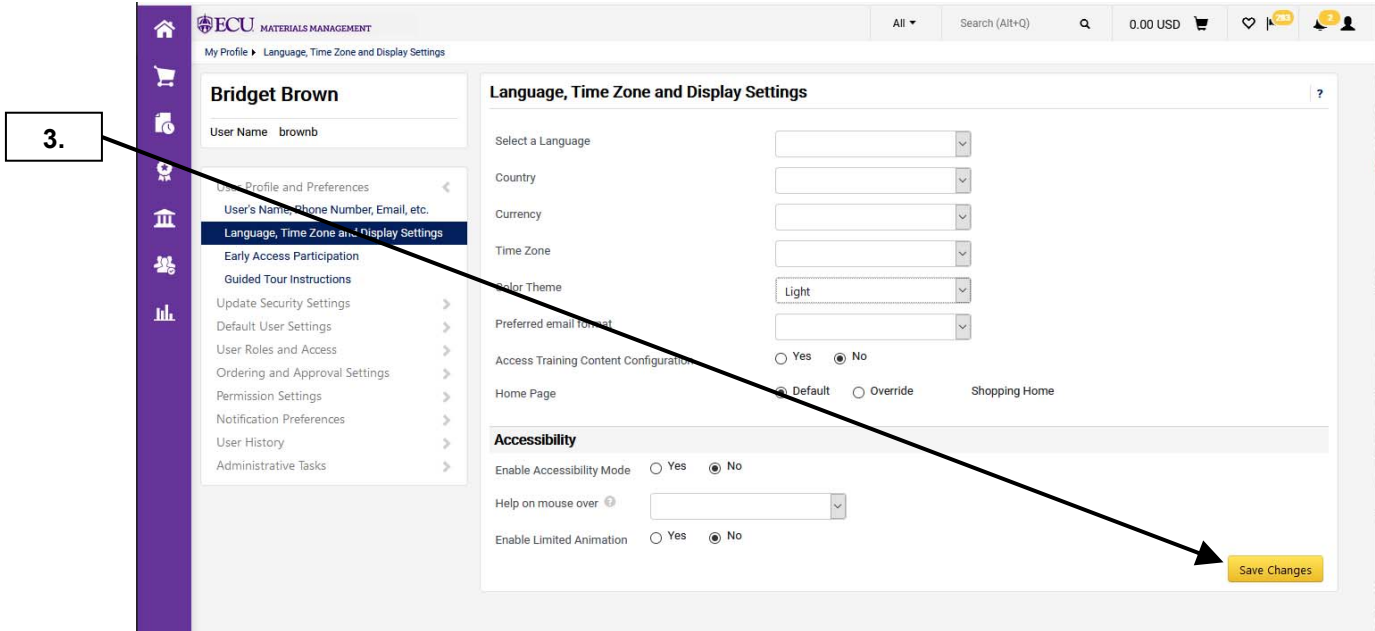
1. Click on **Language, Time Zone and Display Settings** link.



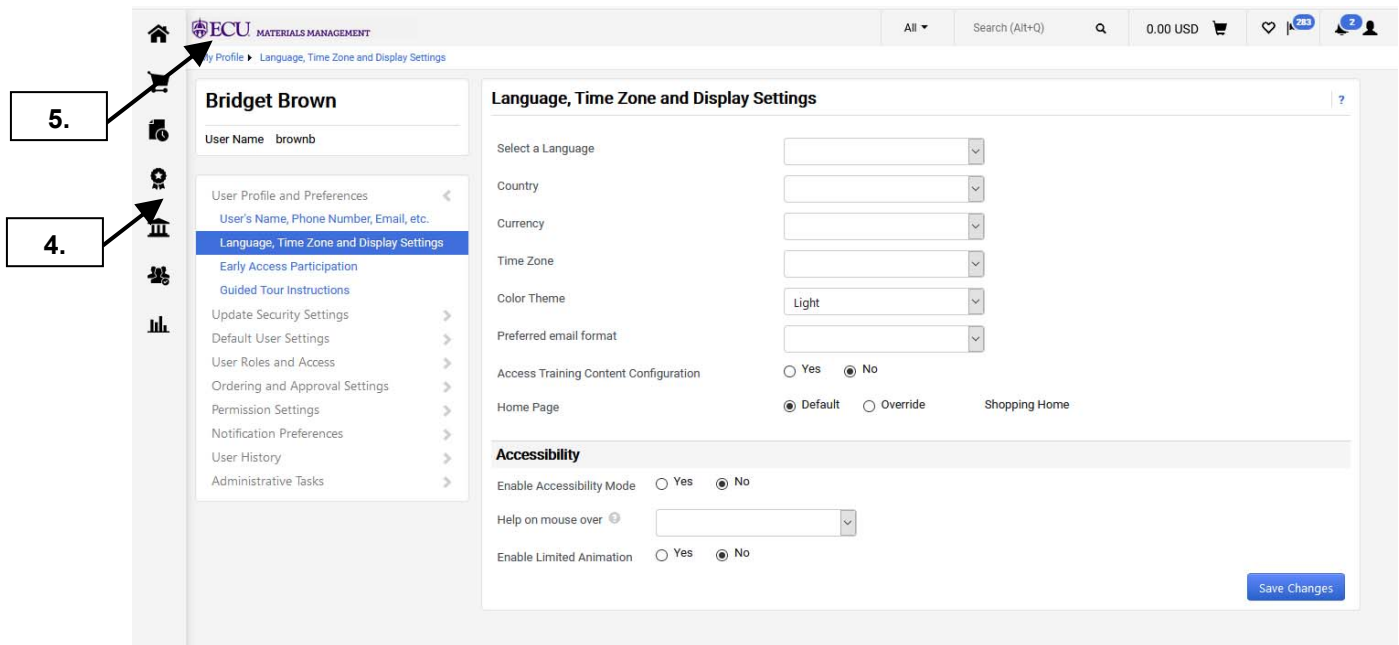
2. Click the drop down for **Color Theme** to select another theme. **Note:** The default setting is **ECU Purple and Gold**.

USER PROFILE COLOR THEME

Last Updated on: 5/14/2021



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: 5/14/2021

The screenshot shows the user profile page for Bridget Brown. The left sidebar menu is expanded to show 'User's Name, Phone Number, Email, etc.' selected. A callout box with the number '1.' and an arrow points to the 'Notification Preferences' link in the sidebar.

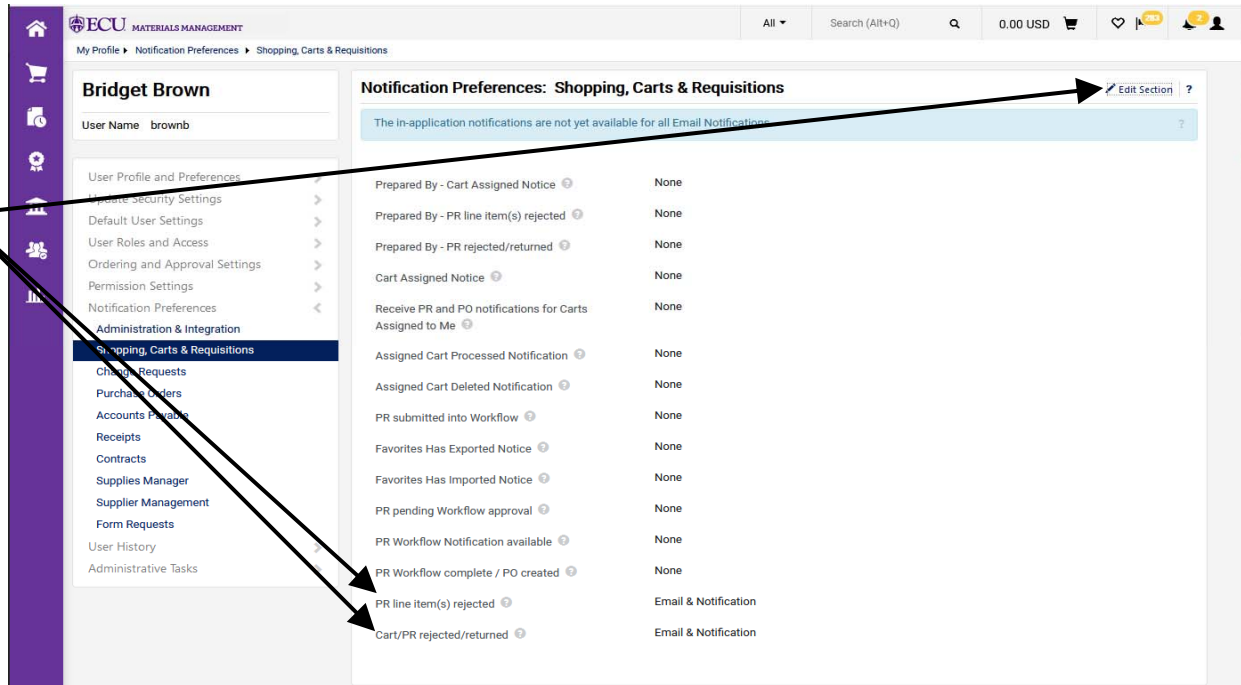
1. Click on **Notification Preferences** link.

The screenshot shows the user profile page for Bridget Brown. The left sidebar menu is expanded to show 'Notification Preferences' selected. A callout box with the number '2.' and an arrow points to the 'Shopping, Carts & Requisitions' link under the 'Notification Preferences' section.

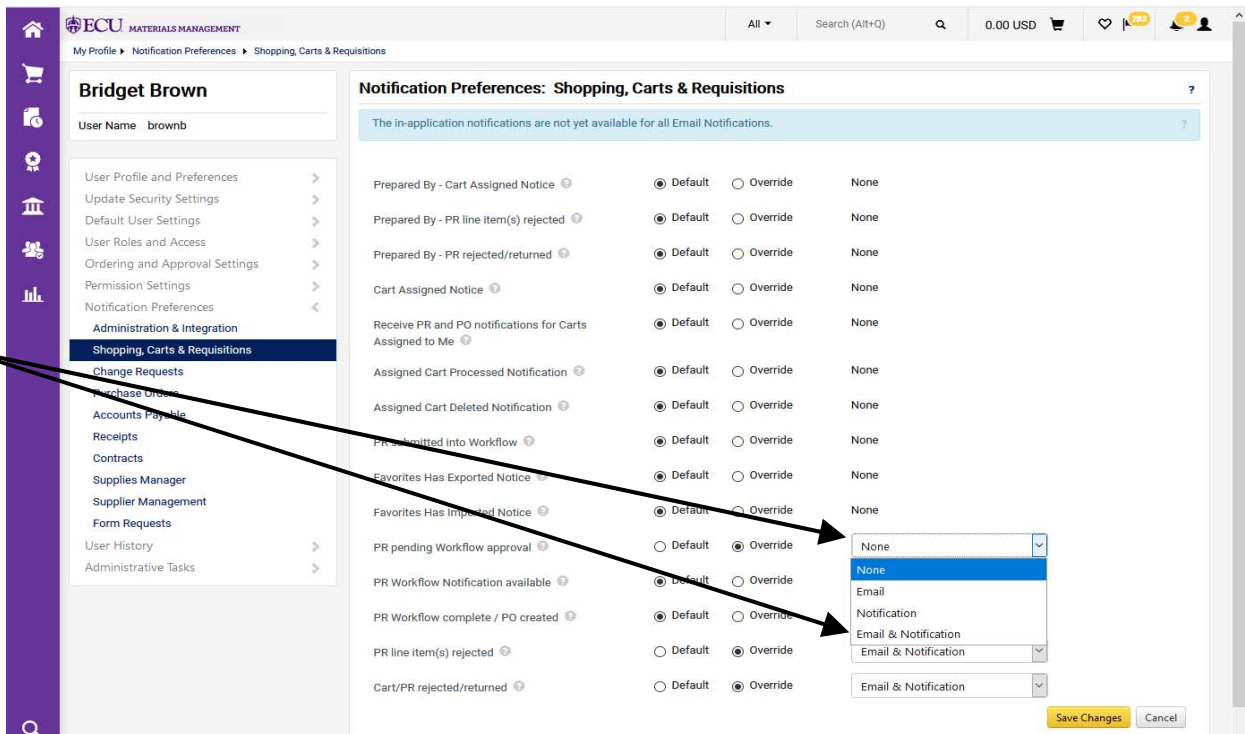
2. From here, you can select any of the sub-sections of **Notification Preferences**. For this example, we will select **Shopping Carts & Requisitions**.

USER PROFILE EMAIL PREFERENCES

Last Updated on: 5/14/2021



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. Select **Override** radio button and then 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: 5/14/2021

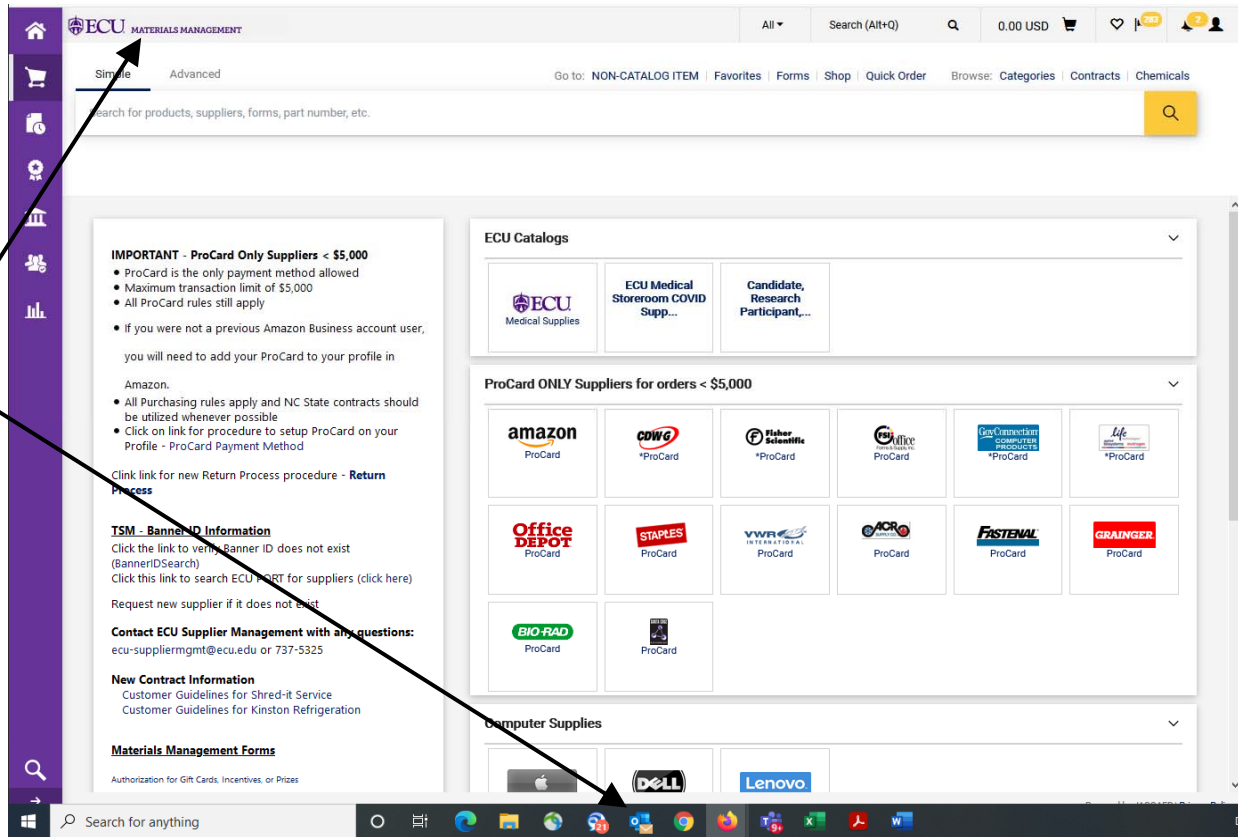
The screenshot shows the 'Notification Preferences: Shopping, Carts & Requisitions' page for user Bridget Brown. The page features a table of notification settings with columns for the notification type, radio buttons for 'Default' and 'Override', and a 'None' option. Some rows also include a dropdown menu for 'Email & Notification'. At the bottom right, there are 'Save Changes' and 'Cancel' buttons. Two callout boxes are present: one labeled '6' pointing to the 'ECU' logo in the top left, and another labeled '5.' pointing to the 'Save Changes' button.

Notification Type	Default	Override	None	Additional Options
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"/>	
Assigned Cart Processed Notification	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Assigned Cart Deleted Notification	<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"/>	Email & Notification
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"/>	Email & Notification
Cart/PR rejected/returned	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Email & Notification

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

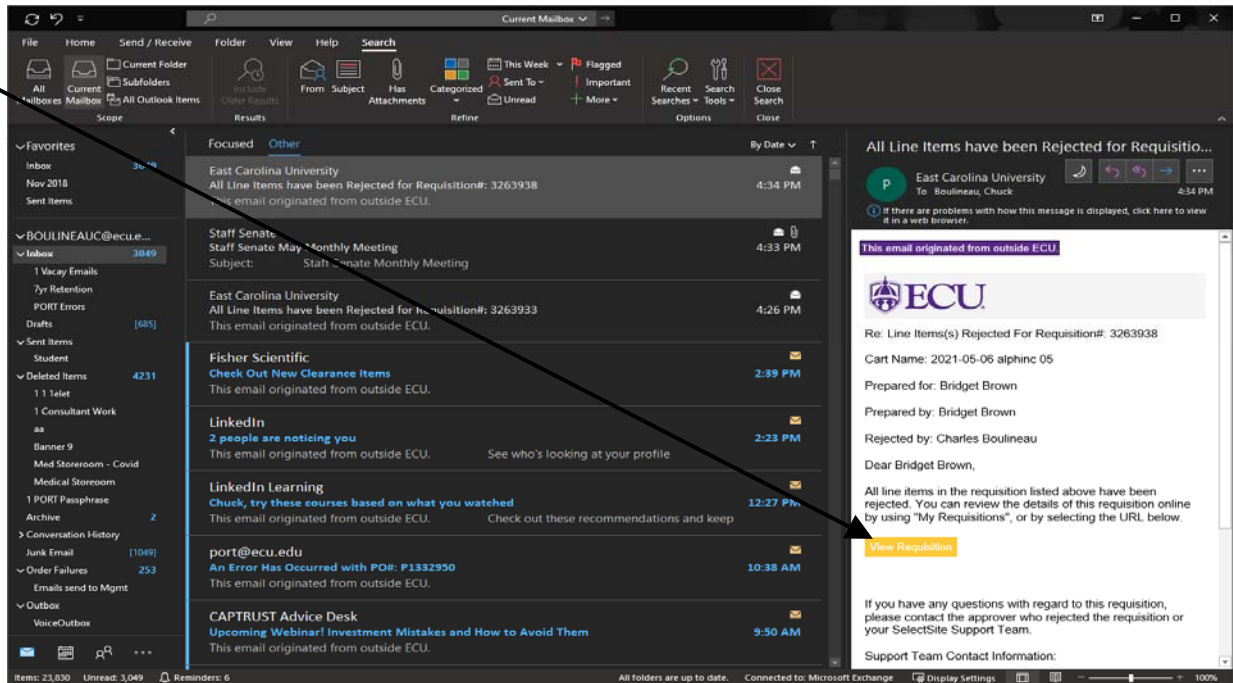
Last Updated on: 5/14/2021



1.

2.

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.

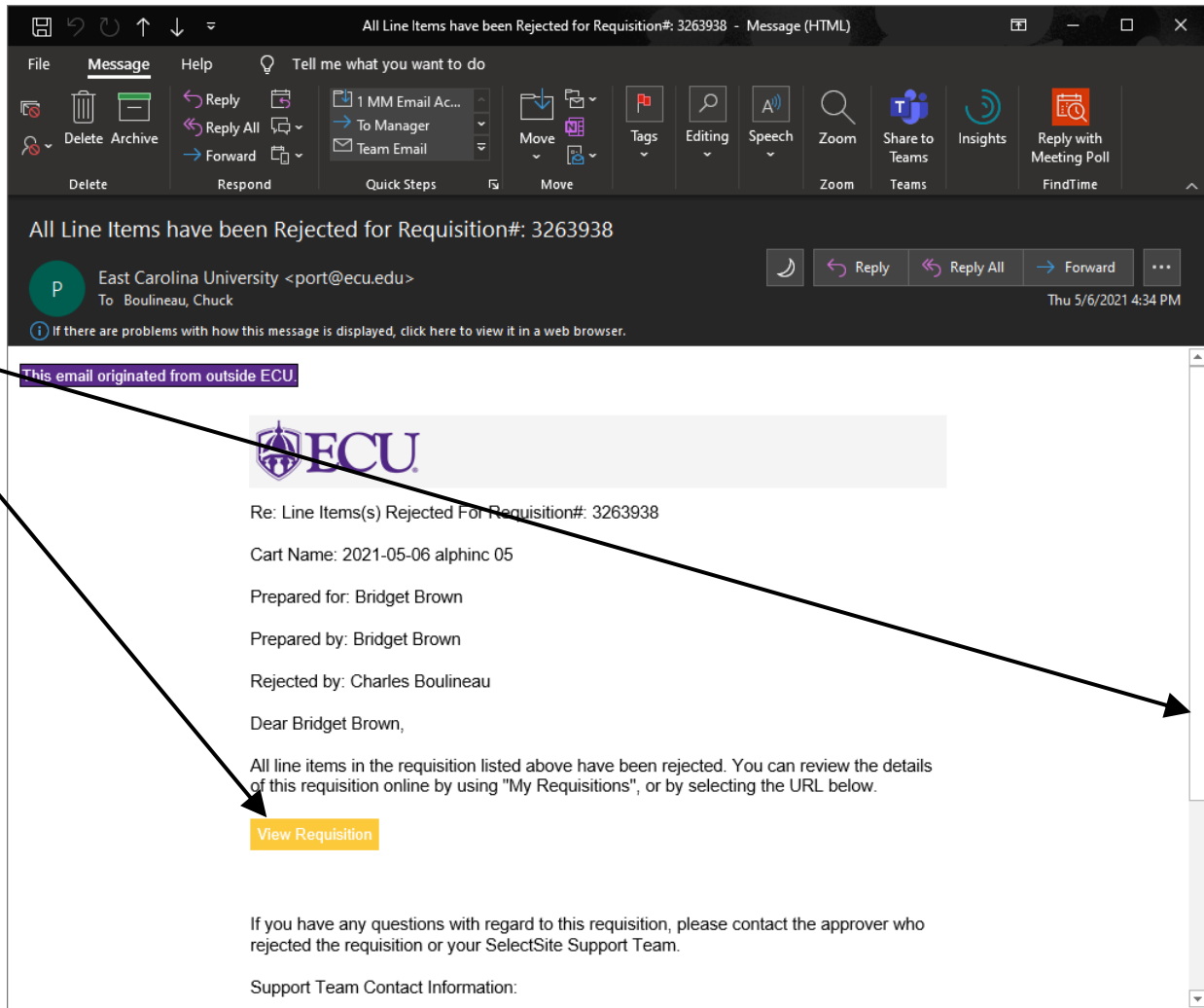


3.

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

USER PROFILE – USING EMAIL NOTIFICATIONS

Last Updated on: 5/14/2021



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: 5/14/2021

The screenshot shows a web browser window with the URL <https://userstest.ecuport.com/apps/Router/ReqSimpleSubmittedSummary?ReqId=3263938>. The page title is "Requisition : 3263938". The navigation tabs include Summary, Taxes/S&H, Comments, Attachments, and History. The main content area displays requisition details, including bill-to information for East Carolina University and a table of FOAPAL / Ship Codes. A "Rejected" summary box on the right shows a total of 0.00 USD. A "What's next?" workflow section shows the status of various steps.

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.

The screenshot shows the "History" tab selected for requisition 3263938. It features a search and filter section with fields for Start date, End date, User, and Requisition. Below this is a table with 8 results. The table columns are Line No, Date/Time, User, Step(s), Action, Field Name, From, To, and Note. The first row shows a rejection action with a note: "Rejecting this duplicate order. Original order was submitted on 5/3/2021." The ECU logo is visible in the top left corner.

Line No	Date/Time	User	Step(s)	Action	Field Name	From	To	Note
	5/6/2021 4:33 PM	Charles Boulineau	Org (Division) Approval	Requisition rejected				Rejecting this duplicate order. Original order was submitted on 5/3/2021.
Line 1	5/6/2021 4:33 PM	Charles Boulineau	Org (Division) Approval	Requisition Line item rejected				
	5/6/2021 4:33 PM	Charles Boulineau	Org (Division) Approval	Requisition assigned				
	5/6/2021 4:33 PM	System	Banner System Validation	Requisition approved				
Line 1	5/6/2021 4:33 PM	System	Banner System Validation	Requisition note added				Item 1, Sequence 1: WARNING : Budget is exceeded for item 1,sequence 1.

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: 5/18/2021

The screenshot shows the ECU Materials Management portal. At the top right, there is a navigation bar with a search bar, currency (0.00 USD), and a user icon. A black arrow points from a box labeled '1.' to the user icon. Below the navigation bar, there is a search bar and a list of categories: NON-CATALOG ITEM, Favorites, Forms, Shop, Quick Order, Browse, Categories, Contracts, and Chemicals. The main content area is divided into two columns. The left column contains important information about ProCard suppliers and return processes. The right column contains a grid of ProCard suppliers for orders under \$5,000, including Amazon, CDWG, Fisher Scientific, Office Depot, Staples, VWR International, ACR, Fastenal, and Grainger.

1. Click on **User** icon.

The screenshot shows the ECU Materials Management portal with the user profile dropdown menu open. A black arrow points from a box labeled '2.' to the 'View My Profile' option in the menu. The menu includes options: View My Profile, Dashboards, Manage Searches, Manage Search Exports, Set My Home Page, My Pending Requisitions (250), and My Pending Purchase Orders (83). There are also 'Logout' and 'Help' buttons at the bottom of the menu.

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

FOAPAL CODE EDITS

Last Updated on: 5/18/2021

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
- 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
- Administrative Tasks

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 **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
- Early Access Participation
- Guided Tour Instructions
- Update Security Settings
- Default User Settings
- Custom Field and Accounting Code Defaults
- Default Addresses
- Cart Assignees
- Checkout Settings
- Payment Options
- Chemical Location Defaults
- User Roles and Access
- Ordering and Approval Settings
- Permission Settings
- Notification Preferences
- User History
- Administrative Tasks

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 the **Custom Field and Accounting Code Defaults** link.

FOAPAL CODE EDITS

Last Updated on: 5/18/2021

The screenshot shows the user interface for Bridget Brown. The left sidebar contains a navigation menu with 'Custom Field and Accounting Code Defaults' selected. The main content area has three tabs: 'Internal info setup', 'Order info setup', and 'FOAPAL Code Setup'. The 'FOAPAL Code Setup' tab is active, displaying a table with the following data:

Custom Field Name	Default Value	Description	Edit Values
State Exempt	No Default Value		Edit
Work Order #	No Default Value		Edit
Accruals	No Default Value		Edit

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

The screenshot shows the 'FOAPAL Code Setup' tab selected. The table displays the following data:

Custom Field Name	Default Value	Description	Edit Values
Chart	E	East Carolina University	Edit
Fund	111170	AA General Institutional Support	Edit
Organization	230601	AF Purchasing	Edit
Account	72110	Office Supplies	Edit
Program	0000	Default Program Code	Edit
Activity	No Default Value		Edit
Location	No Default Value		Edit
Commodity Code	No Default Value		Edit

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: 5/18/2021

My Profile > Custom Field and Accounting Code Defaults

Bridget Brown
User Name brownb

Custom Field and Accounting Code Defaults

Internal info setup | Order info setup | **FOAPAL Code Setup** | Code Favorites

Custom Field Name	Default Value	Description	Edit Values
Chart	E	East Carolina University	Edit
Fund	No Default Value		Edit
Organization	230601	AF Purchasing	Edit
Account	72110	Office Supplies	Edit
Program	0000	Default Program Code	Edit
Activity	No Default Value		Edit
Location	No Default Value		Edit
Commodity Code	No Default Value		Edit

1.

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.

My Profile > Custom Field and Accounting Code Defaults

Bridget Brown
User Name brownb

Custom Field and Accounting Code Defaults

Internal info setup | Order info setup | **FOAPAL Code Setup** | Code Favorites

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

Edit Values

Create New Value

Value	Description
-------	-------------

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

2.

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

FOAPAL CODE – ADDITIONS BY VALUE

Last Updated on: 5/18/2021

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.

5. Select the **check box** beside the value.

6. Click the **Add Values** button.

FOAPAL CODE – ADDITIONS BY VALUE

Last Updated on: 5/18/2021

The screenshot displays the 'Custom Field and Accounting Code Defaults' interface. On the left, a navigation menu for 'Bridget Brown' includes options like 'User Profile and Preferences', 'Default Addresses', and 'Custom Field and Accounting Code Defaults'. The main area shows the 'FOAPAL Code Setup' tab with a table of custom field values. The table has columns for 'Custom Field Name', 'Default Value', 'Description', and 'Edit Values'. The 'Fund' row is highlighted, showing 'No Default Value'. A search box on the right shows 'No Results Found' for the search criteria. Callout box 7 points to the search results area, and callout box 8 points to the 'Fund' row in the table.

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

Value	Description
111170	AA General Institutional Support

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: 5/18/2021

The screenshot shows the user profile for Bridget Brown. The 'Custom Field and Accounting Code Defaults' section is active, displaying a table with the following data:

Custom Field Name	Default Value	Description	Edit Values
Chart	E	East Carolina University	Edit
Fund	No Default Value		Edit
Organization	230601	AF Purchasing	Edit
Account	72110	Office Supplies	Edit
Program	0000	Default Program Code	Edit
Activity	No Default Value		Edit
Location	No Default Value		Edit
Commodity Code	No Default Value		Edit

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.

The screenshot shows the 'Edit Values' dialog box for the 'Fund' field. The dialog contains a table with the following data:

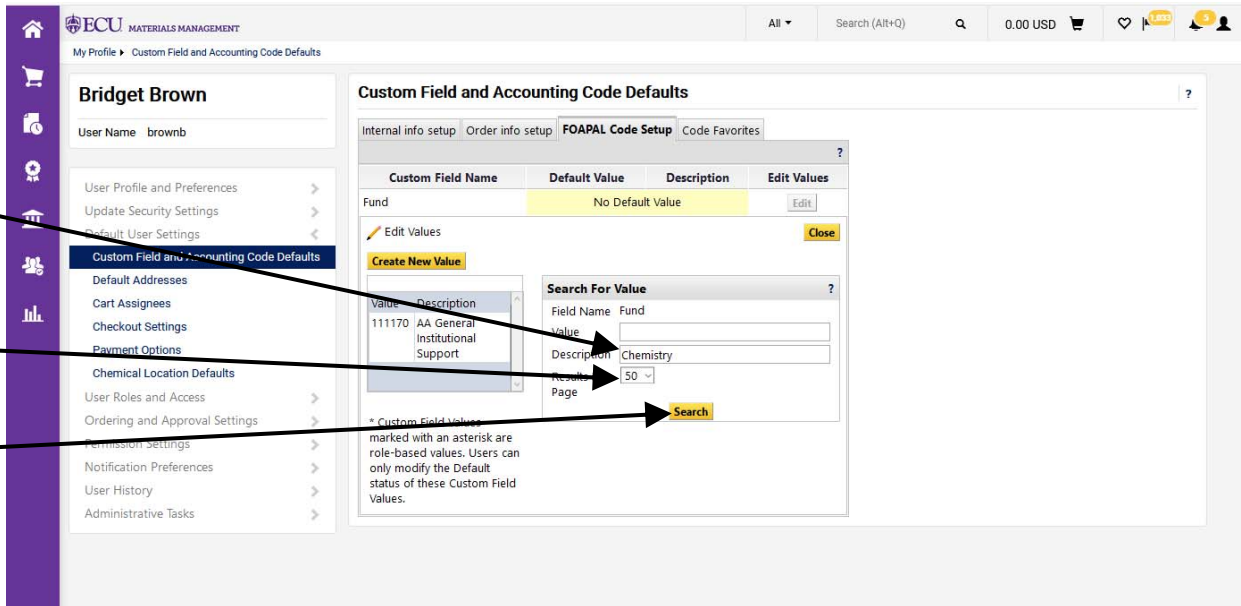
Value	Description
111170	AA General Institutional Support

Below the table, there is a 'Create New Value' button and a 'Close' button. A note at the bottom of the dialog reads: '* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.'

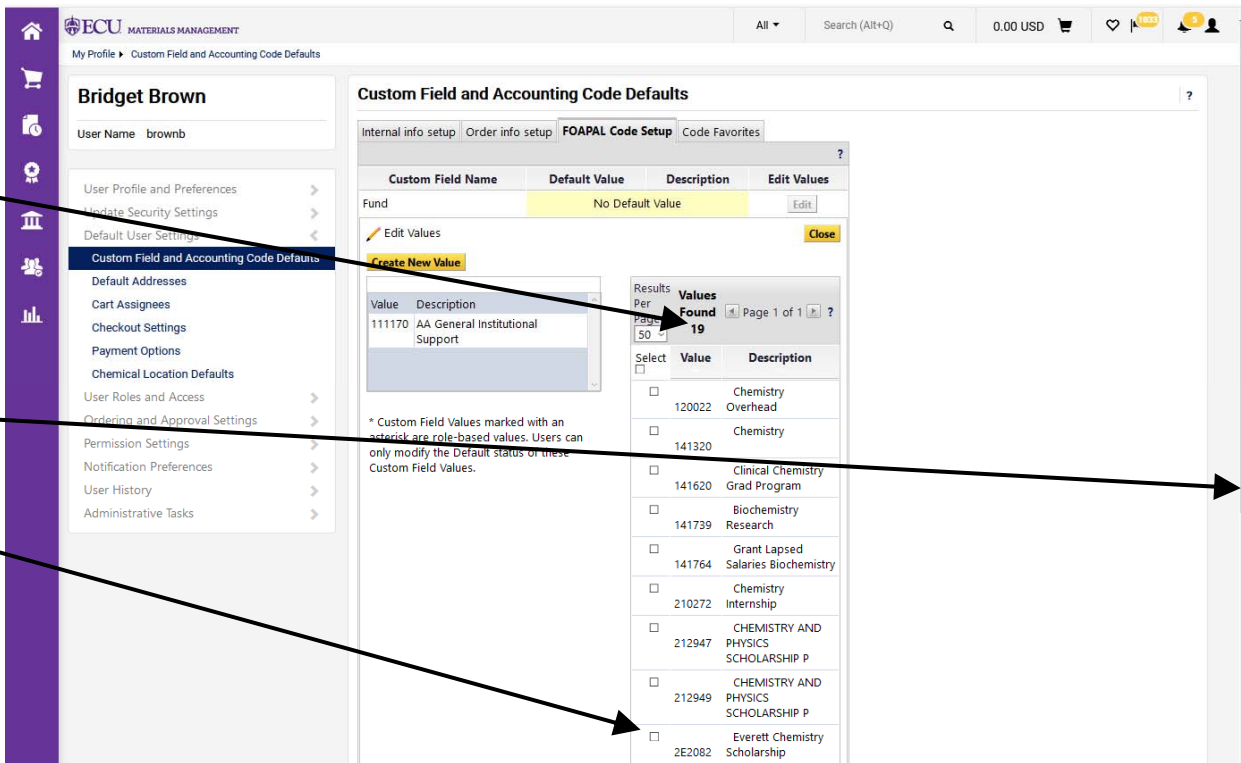
2. Click on the **Create New Value** button.

FOAPAL CODE – ADDITIONS BY DESCRIPTION

Last Updated on: 5/18/2021



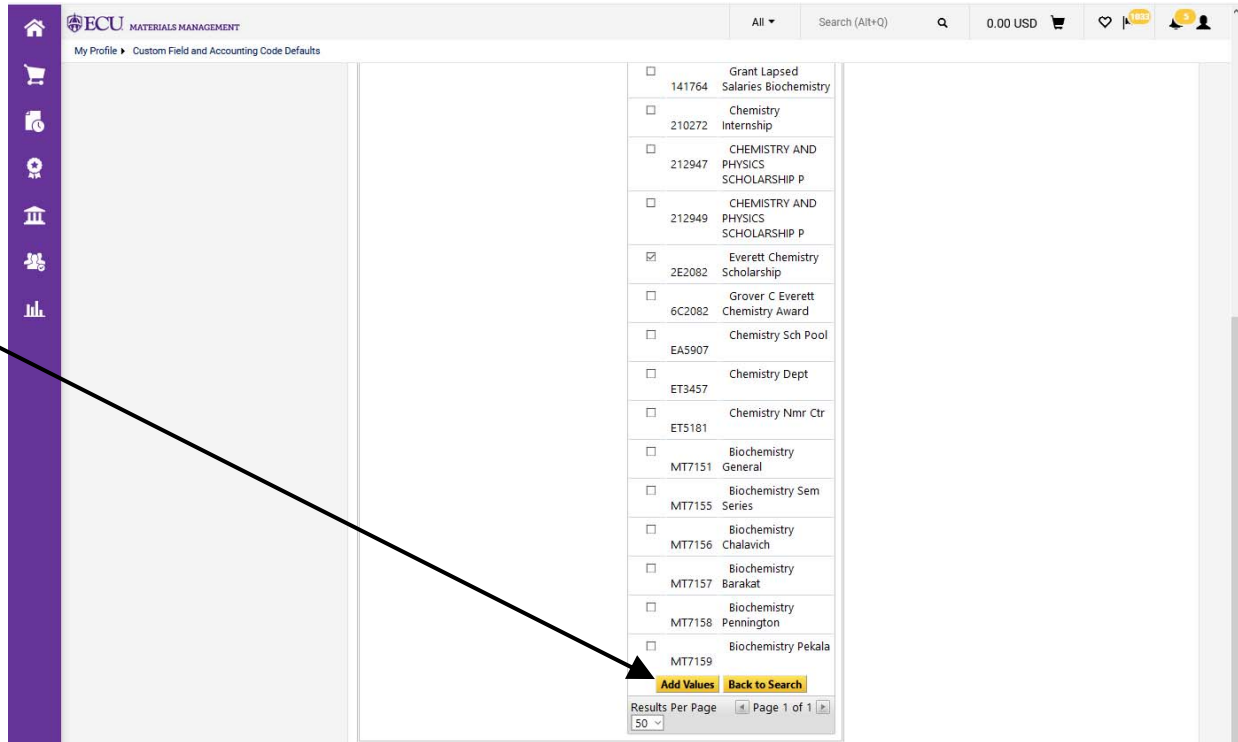
3. Type in the description for the element you are adding. In this example, we are adding a **Fund** value with **Chemistry** in the Description.
4. Change the **Results per Page** to 50.
5. Click on the **Search** button.



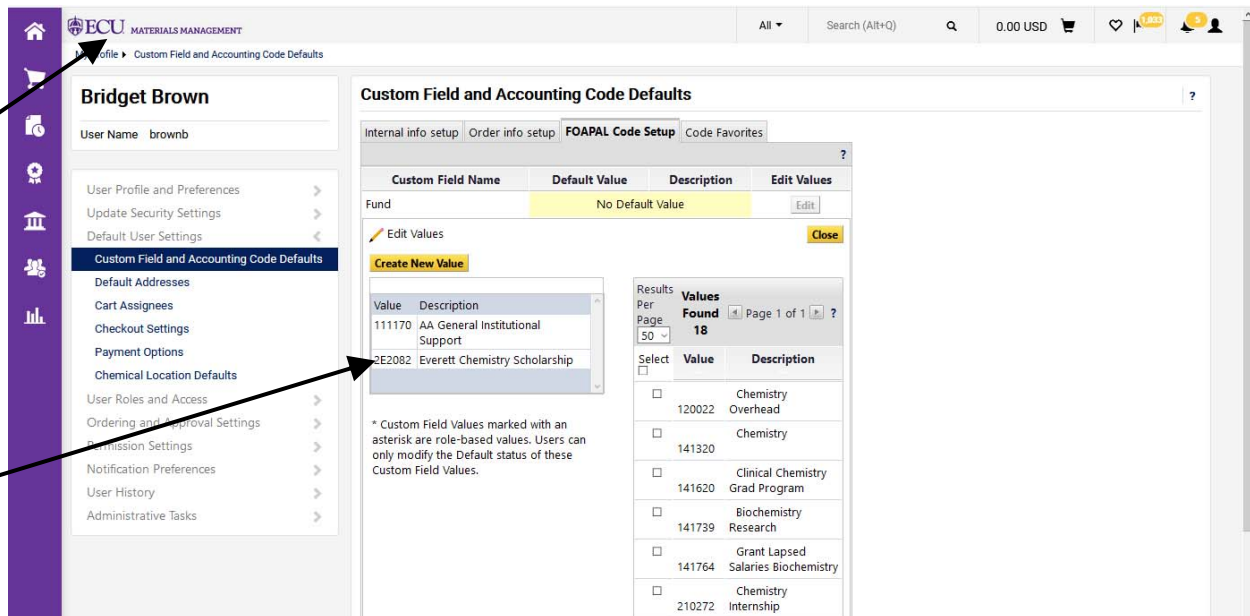
6. The number of Fund values found on the criteria you type will be displayed at the top of the results.
7. You can scroll down the page to find the desired Fund value.
8. Click the check box beside the desired Fund value. Scroll down the page to add the value to your profile.

FOAPAL CODE – ADDITIONS BY DESCRIPTION

Last Updated on: 5/18/2021



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



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: 5/18/2021

The screenshot shows the 'Custom Field and Accounting Code Defaults' page for user Bridget Brown. The page has a sidebar with navigation options and a main content area with tabs for 'Internal info setup', 'Order info setup', 'FOAPAL Code Setup', and 'Code Favorites'. The 'FOAPAL Code Setup' tab is active, displaying a table with columns: Custom Field Name, Default Value, Description, and Edit Values. The table contains the following data:

Custom Field Name	Default Value	Description	Edit Values
Chart	E	East Carolina University	Edit
Fund	111170	AA General Institutional Support	Edit
Organization	230601	AF Purchasing	Edit
Account	72110	Office Supplies	Edit
Program	0000	Default Program Code	Edit
Activity		No Default Value	Edit
Location		No Default Value	Edit
Commodity Code		No Default Value	Edit

A box labeled '1.' points to the 'Edit' button for the 'Organization' row.

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.

The screenshot shows the 'Edit Values' dialog box for the 'Organization' row. The dialog has a 'Create New Value' button and a list of values. The list has the following data:

Value	Description
230601	AF Purchasing
230602	AF Central Receiving and Warehouse
230603	AF Medical Stores

A box labeled '2.' points to the '230601 AF Purchasing' option in the list.

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: 5/18/2021

My 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 >
Cart Assignees >
Checkout Settings >
Payment Options >
Chemical Location Defaults >
User Roles and Access >
Ordering and Approval Settings >
Permission Settings >
Notification Preferences >
User History >
Administrative Tasks >

Internal info setup | Order info setup | **FOAPAL Code Setup** | Code Favorites

Custom Field Name	Default Value	Description	Edit Values
Organization	230601	AF Purchasing	Edit

Edit Values Close

Create New Value

Value	Description
230601	AF Purchasing
230602	AF Central Receiving and Warehouse
230603	AF Medical Stores

Edit Existing Value ?

Value 230603
Description AF Medical Stores
Default
Status active
Save Remove

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

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

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 >
Cart Assignees >
Checkout Settings >
Payment Options >
Chemical Location Defaults >
User Roles and Access >
Ordering and Approval Settings >
Permission Settings >
Notification Preferences >
User History >
Administrative Tasks >

Internal info setup | Order info setup | **FOAPAL Code Setup** | Code Favorites

Custom Field Name	Default Value	Description	Edit Values
Organization	230603	AF Medical Stores	Edit

Edit Values Close

Create New Value

Value	Description
230601	AF Purchasing
230602	AF Central Receiving and Warehouse
230603	AF Medical Stores

Edit Existing Value ?

Value 230603
Description AF Medical Stores
Default
Status active
Save Remove

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

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: 5/18/2021

The screenshot shows the user profile page for Bridget Brown. The 'Custom Field and Accounting Code Defaults' section is active, displaying a table of FOAPAL Code Setup values. A box labeled '1.' points to the 'Edit' button for the 'Organization' row.

Custom Field Name	Default Value	Description	Edit Values
Chart	E	East Carolina University	Edit
Fund	111170	AA General Institutional Support	Edit
Organization	230601	AF Purchasing	Edit
Account	72110	Office Supplies	Edit
Program	0000	Default Program Code	Edit
Activity		No Default Value	Edit
Location		No Default Value	Edit
Commodity Code		No Default Value	Edit

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.

The screenshot shows the 'Edit Values' dialog box for the 'Organization' row. A box labeled '2.' points to the '230601 AF Purchasing' value in the list.

Value	Description
230601	AF Purchasing
230602	AF Central Receiving and Warehouse
230603	AF Medical Stores

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

FOAPAL CODE DELETIONS

Last Updated on: 5/18/2021

The screenshot shows the user interface for 'Bridget Brown' in the 'ECU MATERIALS MANAGEMENT' system. The page title is 'Custom Field and Accounting Code Defaults'. The 'FOAPAL Code Setup' tab is active, displaying a table of custom field values:

Custom Field Name	Default Value	Description	Edit Values
Organization	230601	AF Purchasing	Edit

Below the table, there is an 'Edit Existing Value' dialog box for the value 230602. The dialog shows the value '230602' and description 'AF Central Receiving and Warehouse'. A 'Remove' button is visible in the dialog. A box labeled '3.' points to this button.

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

The screenshot shows the same user interface as above, but the value 230602 has been removed from the list. The table now shows:

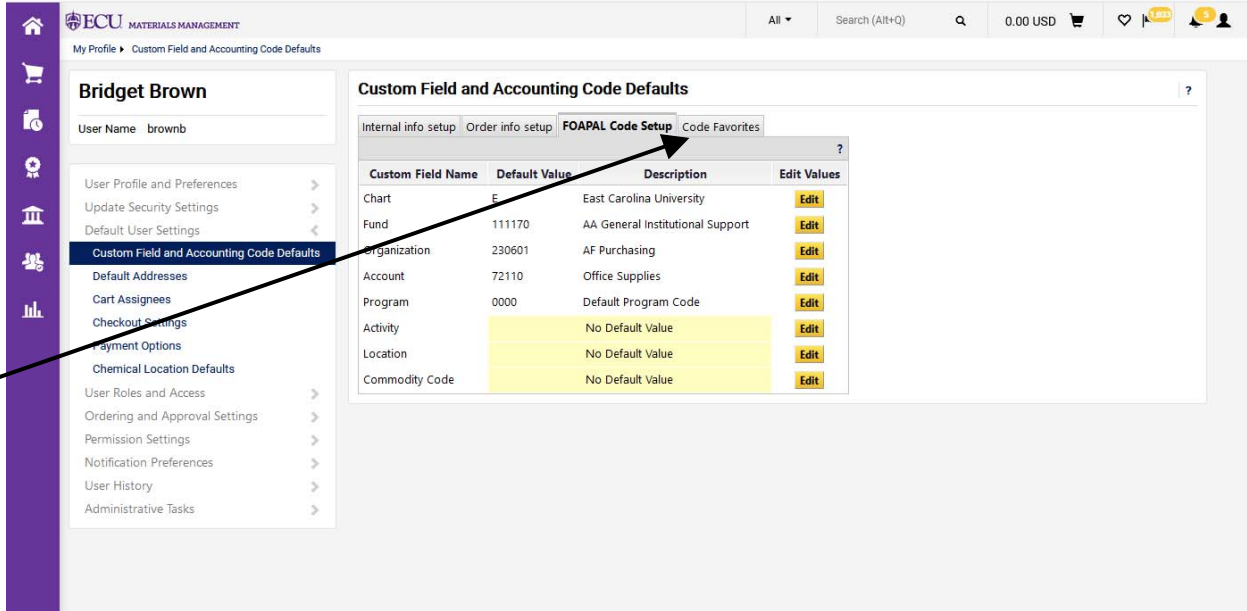
Value	Description
230601	AF Purchasing
230603	AF Medical Stores

A box labeled '4.' points to this updated list. Another box labeled '5.' points to the 'ECU' logo in the top left corner of the page header.

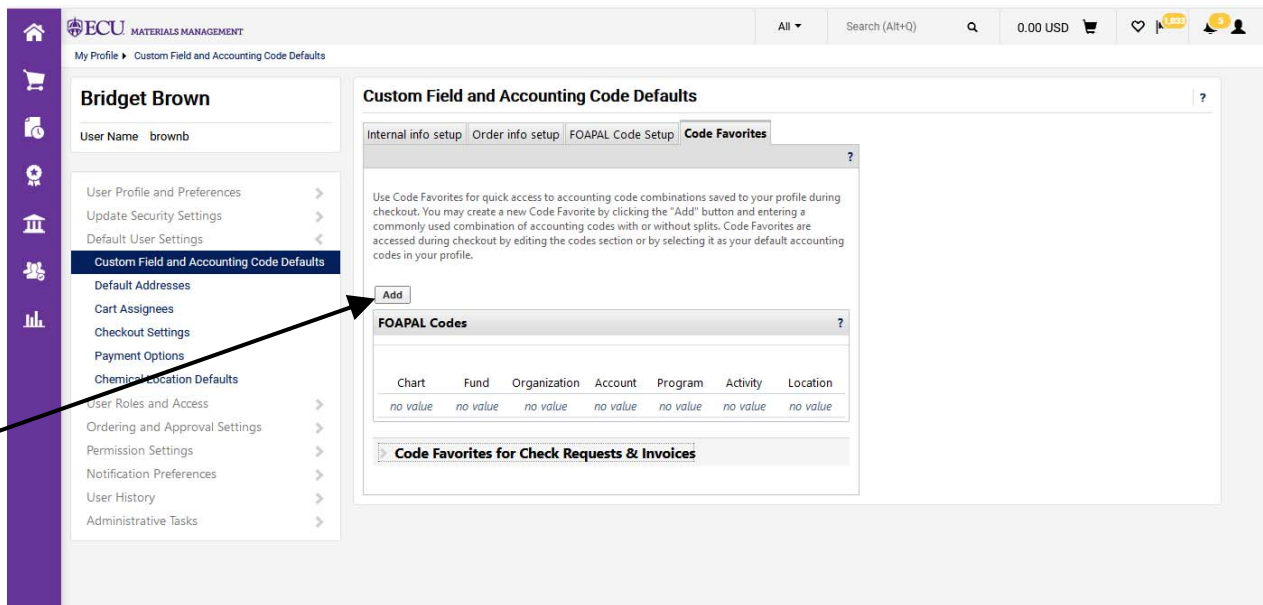
4. Notice the value has been removed from your list of values for **Organizations** in your profile.
5. This completes the steps for this procedure. Click on the **ECU** icon to return to the home page.

FOAPAL CODE – FAVORITES

Last Updated on: 5/18/2021



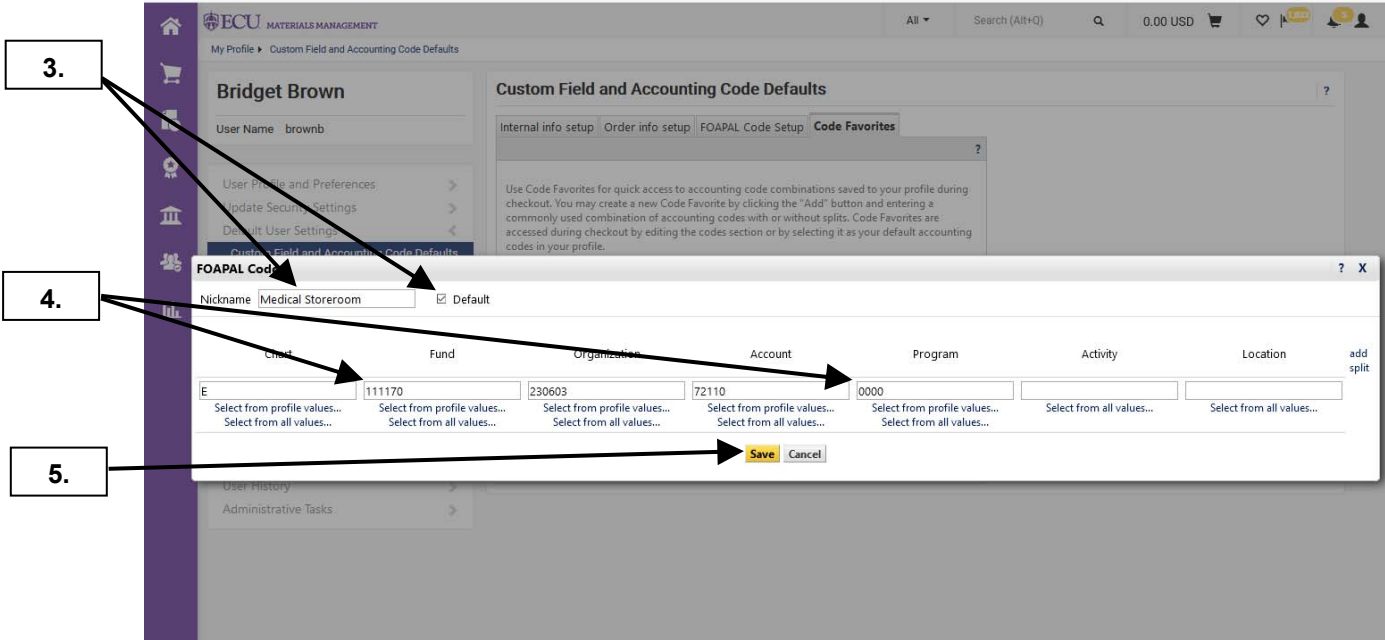
1. Click on the **Code Favorites** tab. **Note:** The steps for adding a value to your profile are the same for each element: Fund, Organization, Account, Program, Activity, and Location.



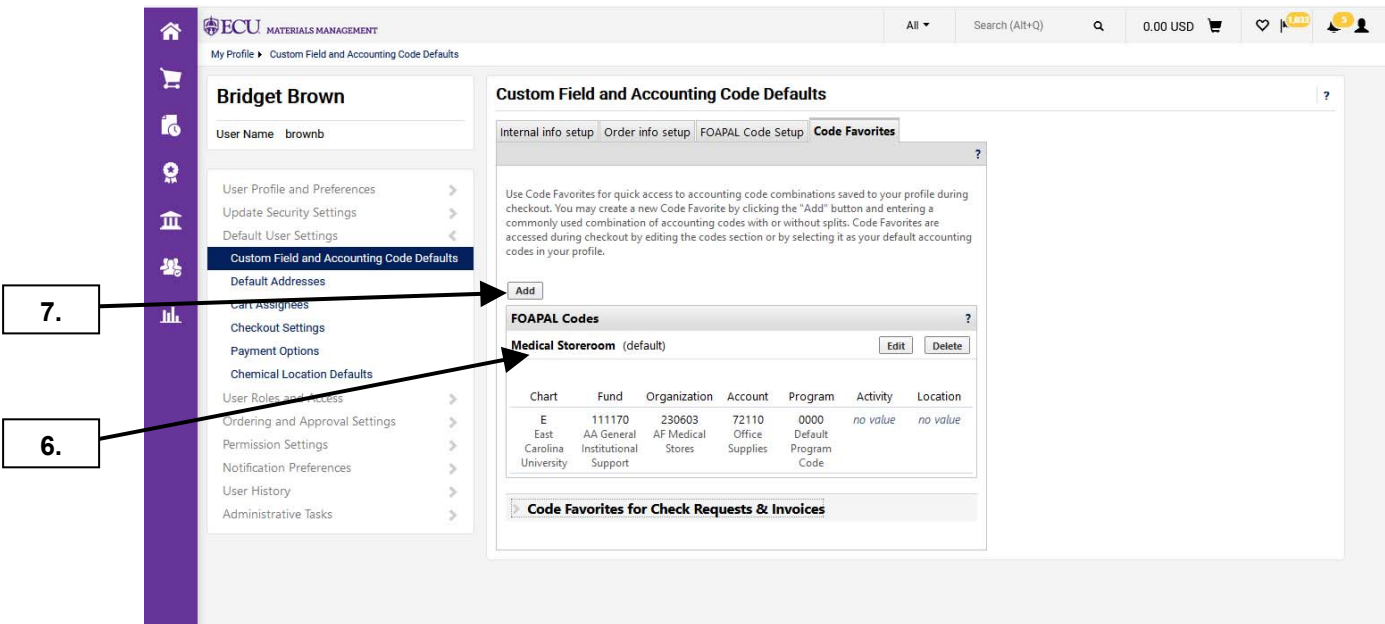
2. Click on the **Add** button.

FOAPAL CODE – FAVORITES

Last Updated on: 5/18/2021



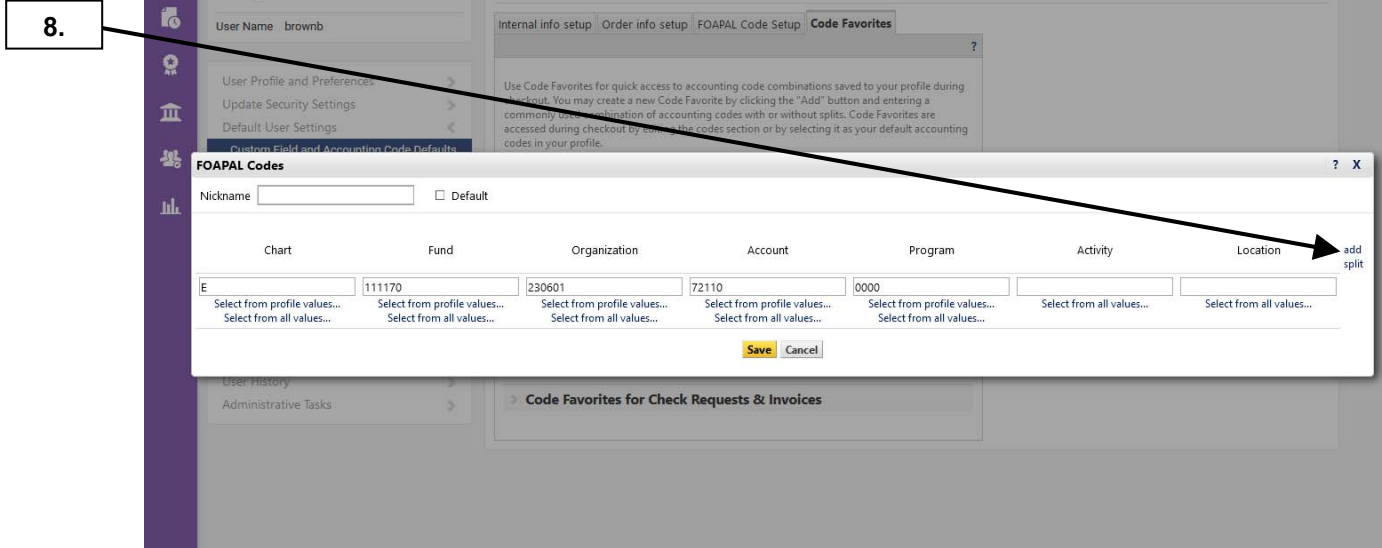
3. Enter the FOAP Favorite **Nickname** and select the **Default** check box if appropriate.
4. If defaults are selected on your user profile, they will be displayed. Update the FOAP values that you want to set as a **FAVORITES**.
5. Click on the **Save** button.



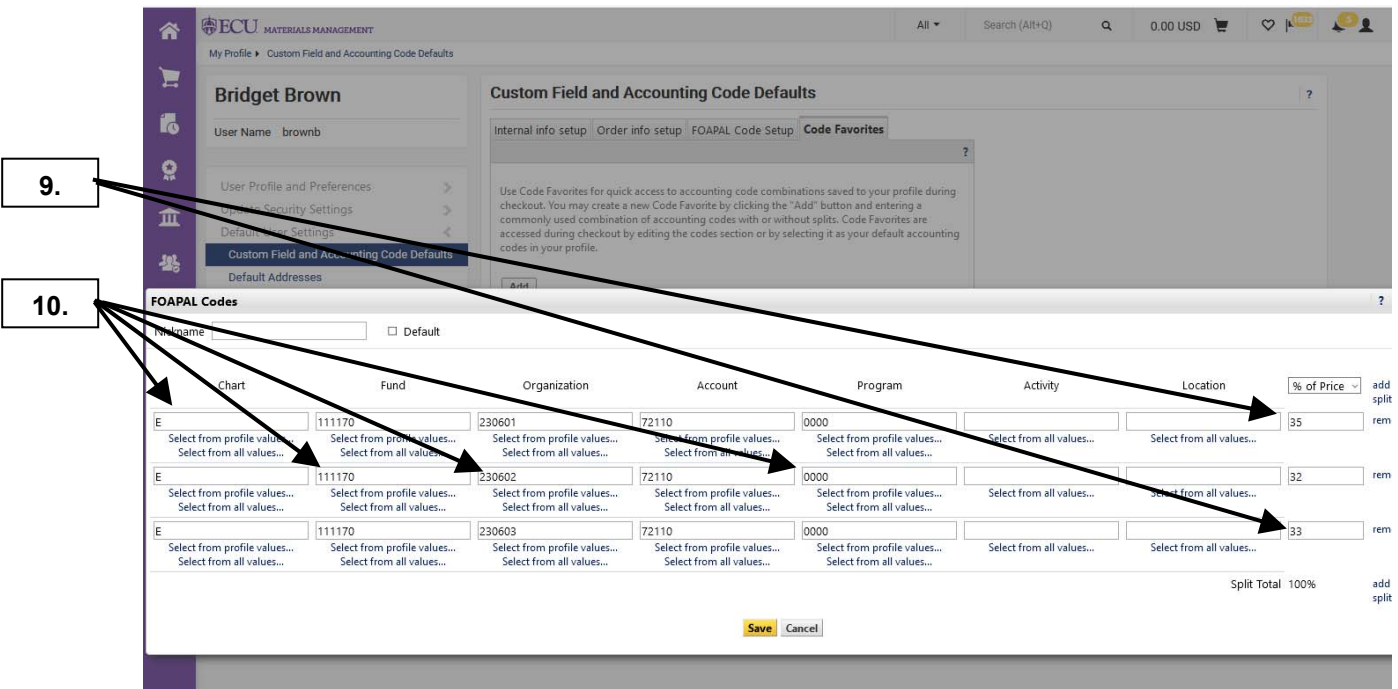
6. Note that the **Code Favorite** was added.
7. Click the **Add** button to add another **Code Favorite** with multiple FOAPAL strings.

FOAPAL CODE – FAVORITES

Last Updated on: 5/18/2021



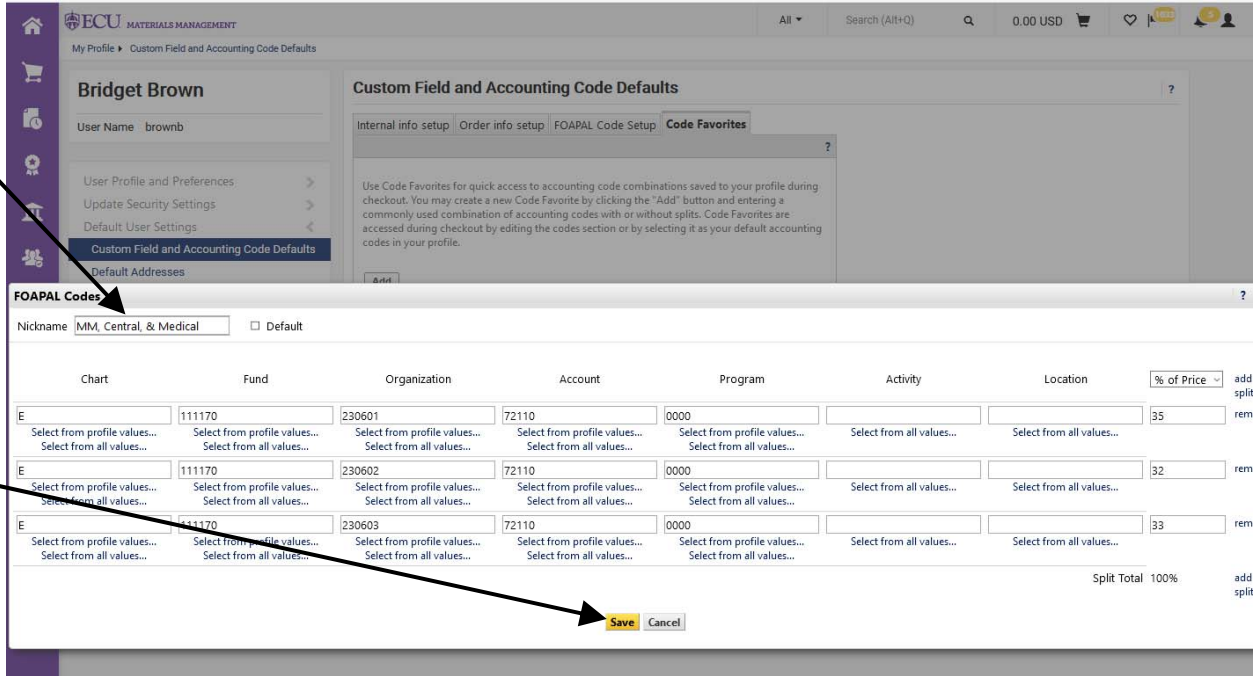
8. Click **add splits** link. **Note:** In this example, we will have 3 different FOAP strings for this code favorite.



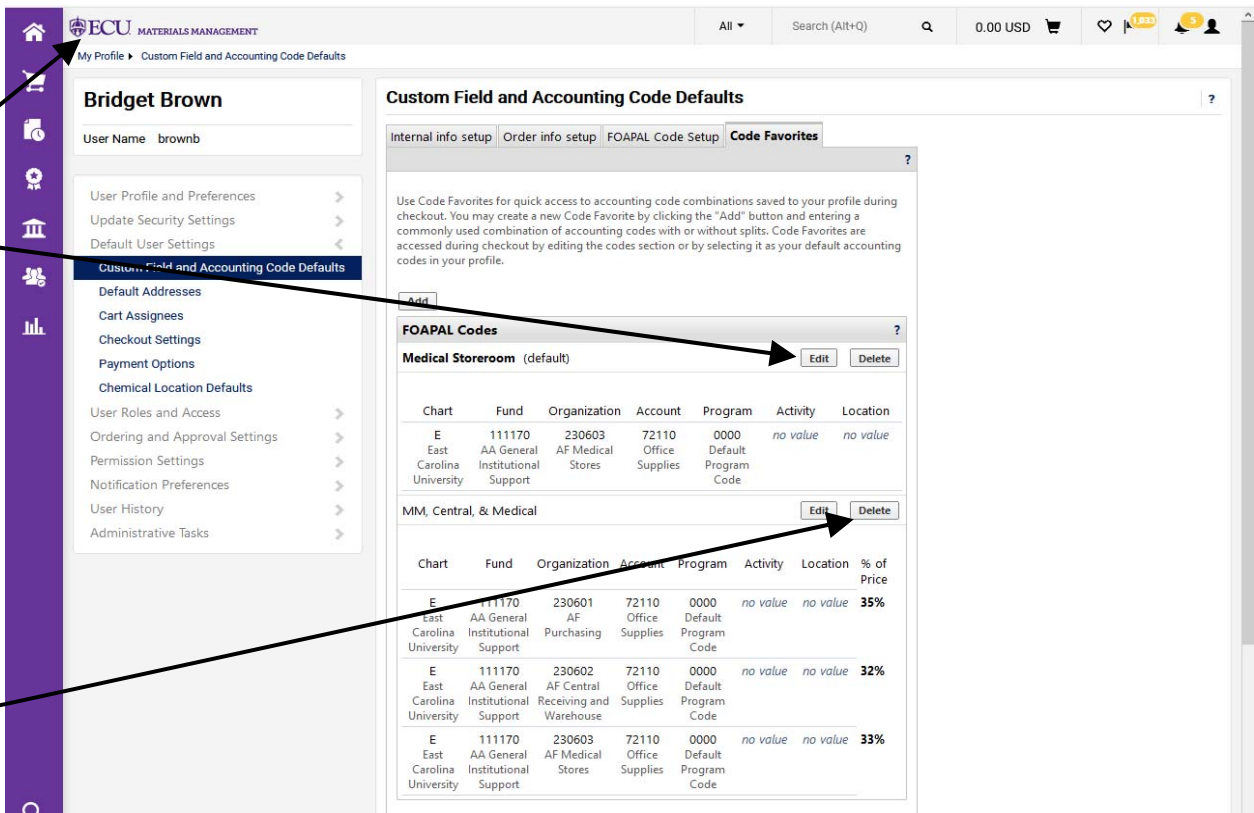
9. The type of FOAP split will be % or Price. Enter the % for each split.
 10. Enter the desired FOAP values for the favorite code split list.

FOAPAL CODE – FAVORITES

Last Updated on: 5/18/2021



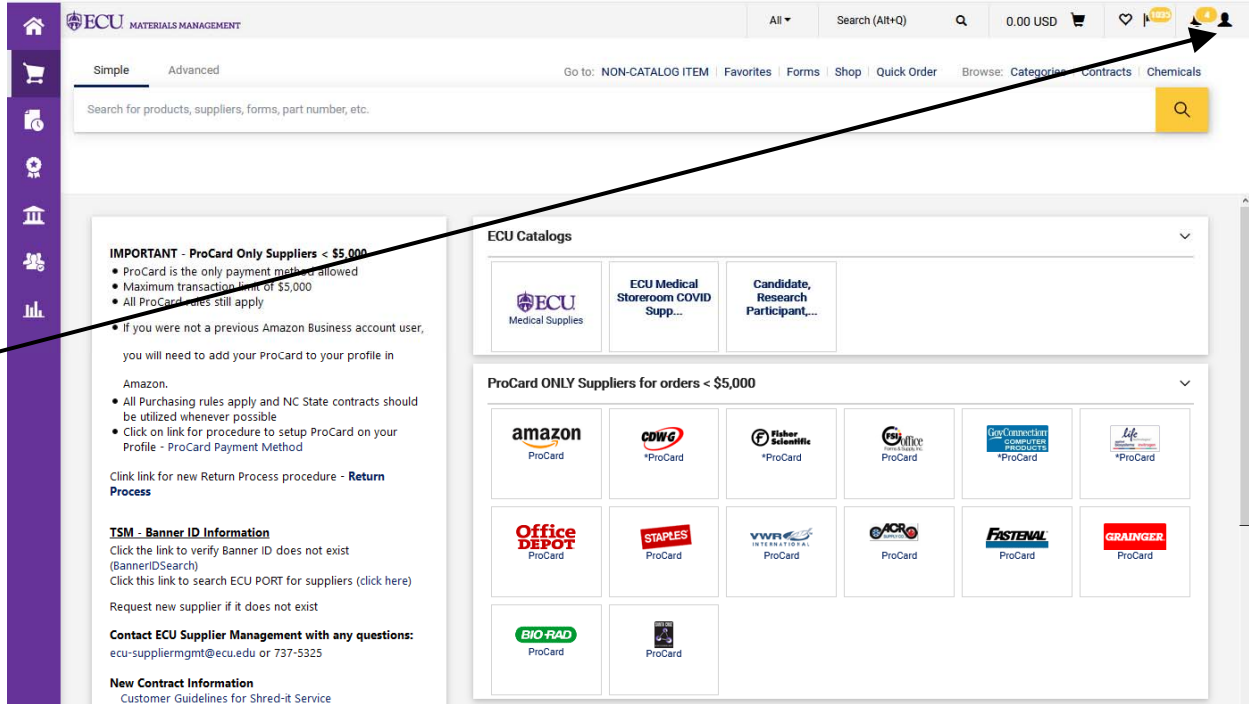
- 11. Enter the FOAP favorite **Nickname**.
- 12. Click the **Save** button.



- 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.

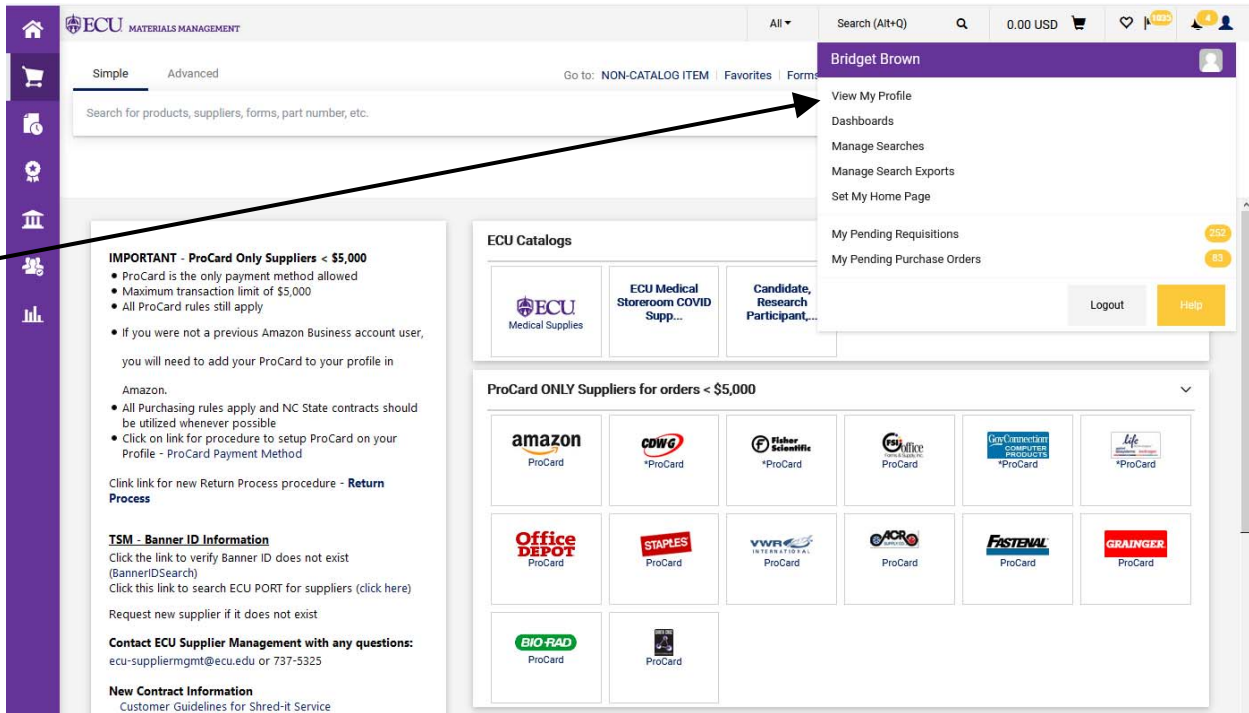
SHIP CODE EDITS

Last Updated on: 5/18/2021



1.

1. Click on **User** icon.



2.

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

SHIP CODE EDITS

Last Updated on: 5/18/2021

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

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 >

Administrative Tasks >

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 +

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

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

Early Access Participation

Guided Tour Instructions

Update Security Settings >

Default User Settings <

Custom Field and Accounting Code Defaults

Default Addresses

Cart Assignees

Checkout Settings

Payment Options

Chemical Location Defaults

User Roles and Access >

Ordering and Approval Settings >

Permission Settings >

Notification Preferences >

User History >

Administrative Tasks >

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 +

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

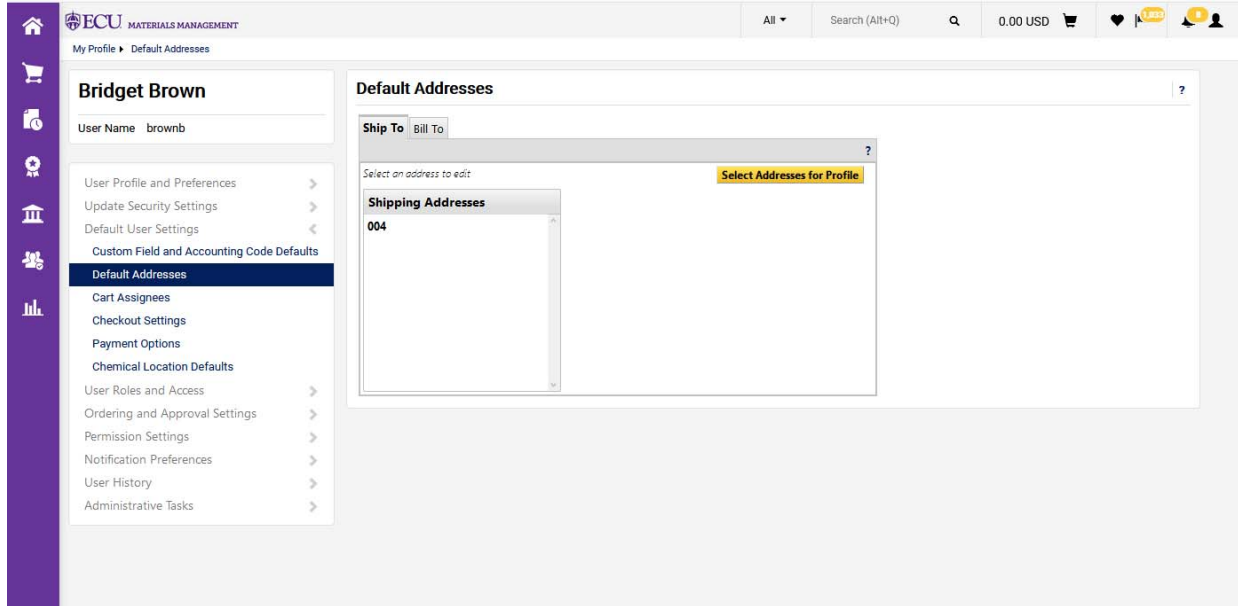
* Required

Save Changes

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

SHIP CODE EDITS

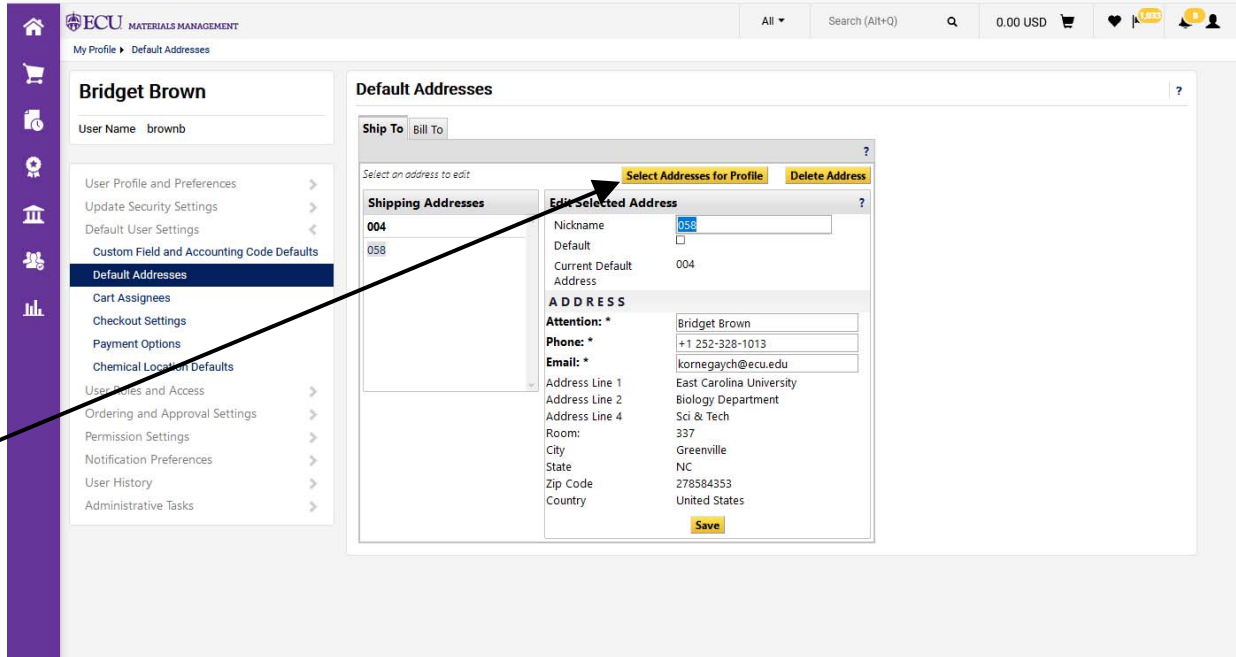
Last Updated on: 5/18/2021



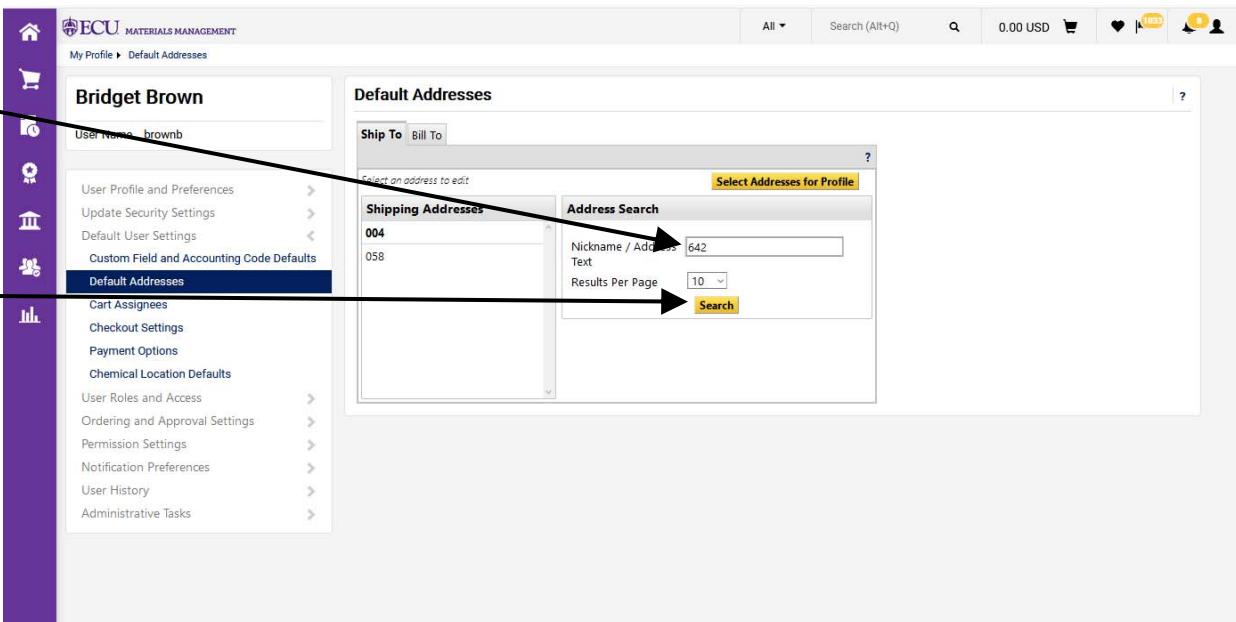
5. Once you are at Default Addresses, you can perform the following tasks related to your ship codes: updating your contact information on your ship codes, adding ship codes to your profile, deleting ship codes from your profile, and changing your default ship code. **Note:** If you need to change your 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: 5/18/2021



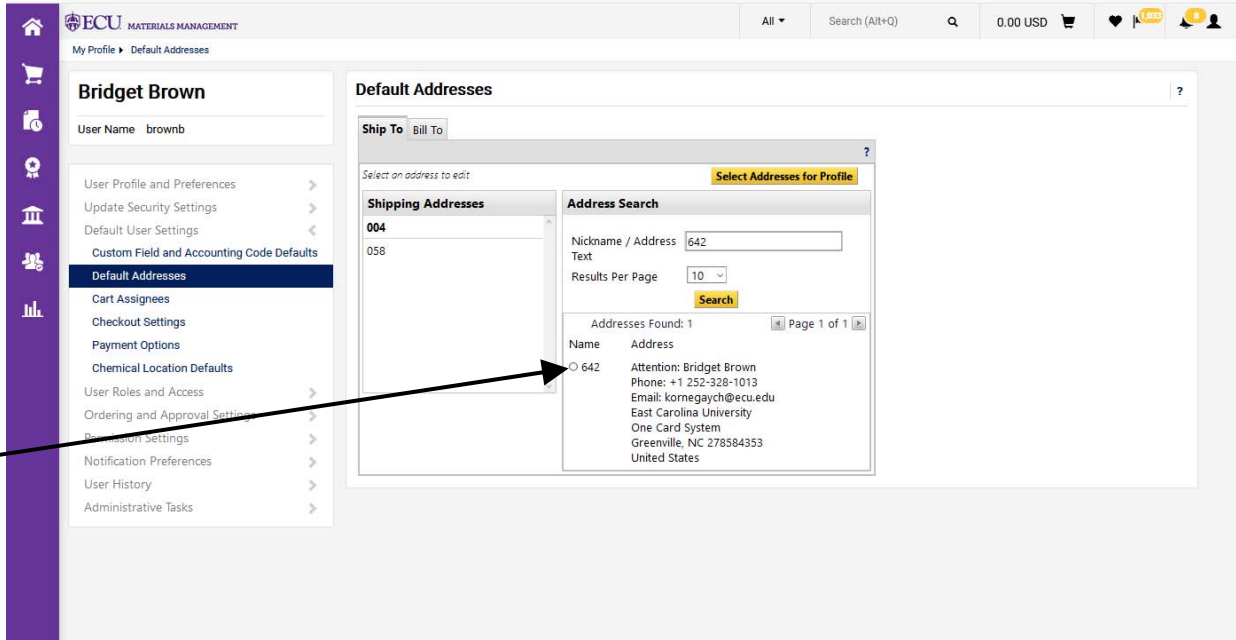
1. Click on **Select Addresses for Profile** button.



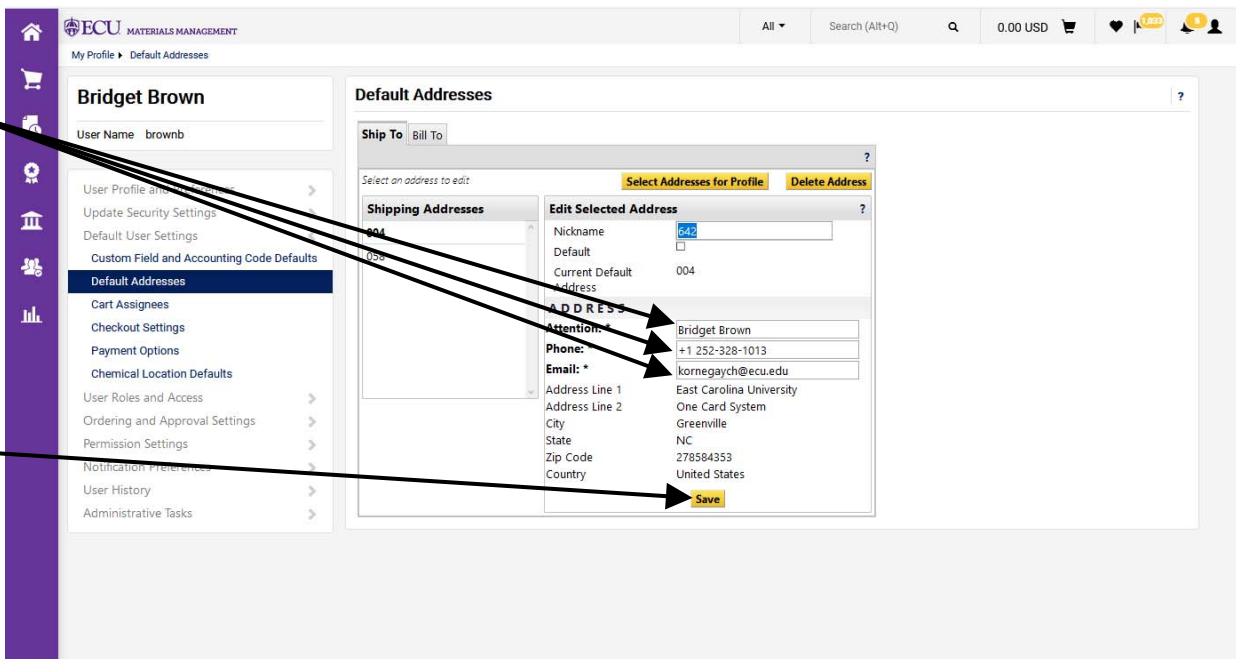
2. Enter ship code number in the **Nickname / Address Text** field if you already know value for the address that needs to be added to your profile. **Note:** Now you can enter either the Nickname or Address Text in the same text box for ship code searches. Mail stop codes are not the same as ship codes,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

SHIP CODE – ADDITIONS BY NICK NAME

Last Updated on: 5/18/2021



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

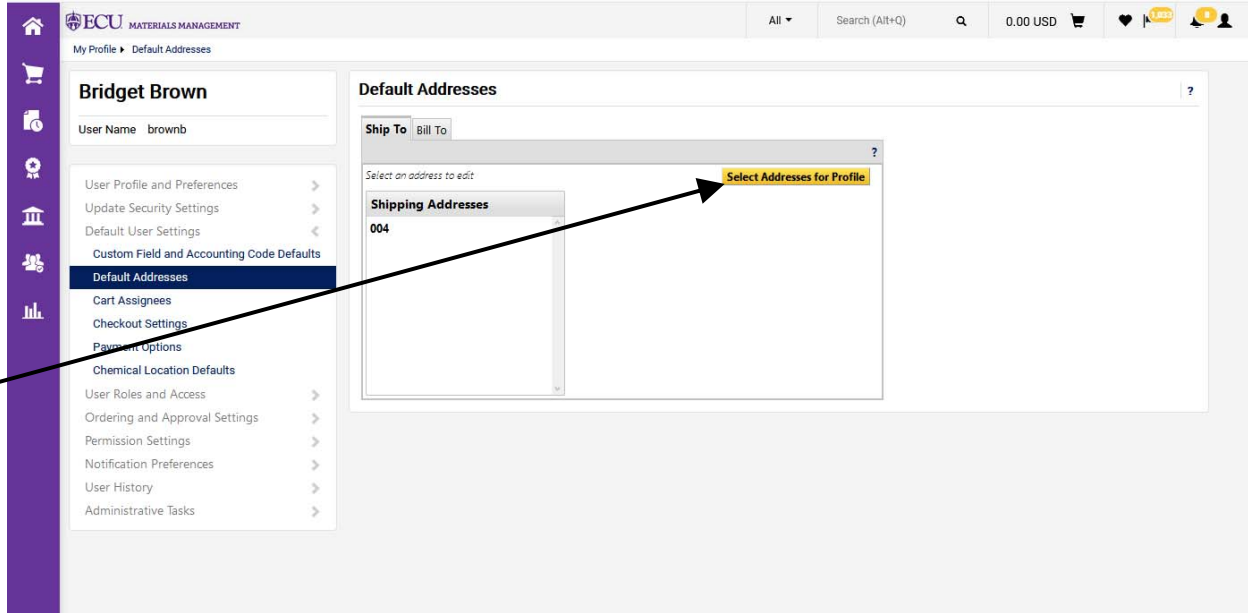
Last Updated on: 5/18/2021

The screenshot shows the user profile page for Bridget Brown. The left sidebar contains a navigation menu with 'Default Addresses' highlighted. The main content area shows the 'Default Addresses' section with a 'Shipping Addresses' list containing 004, 058, and 642. The 'Edit Selected Address' form for address 642 is open, displaying fields for Nickname (642), Default (checkbox), Current Default Address (004), and a full address form with fields for Attention, Phone, Email, Address Line 1, Address Line 2, City, State, Zip Code, and Country. A 'Save' button is at the bottom of the form.

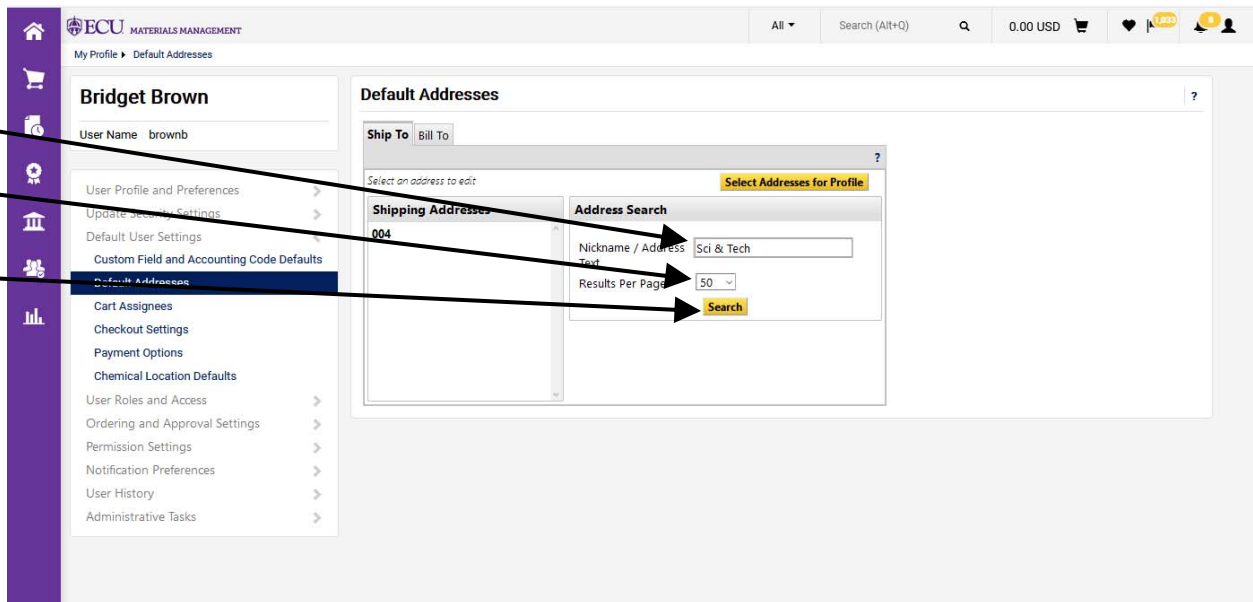
7. Notice that the new ship code is now in your list of values for **Shipping Addresses**.
8. This completes the steps for this procedure. Click on the **ECU** icon to return to the home page.

SHIP CODE – ADDITIONS BY DESCRIPTION

Last Updated on: 5/18/2021



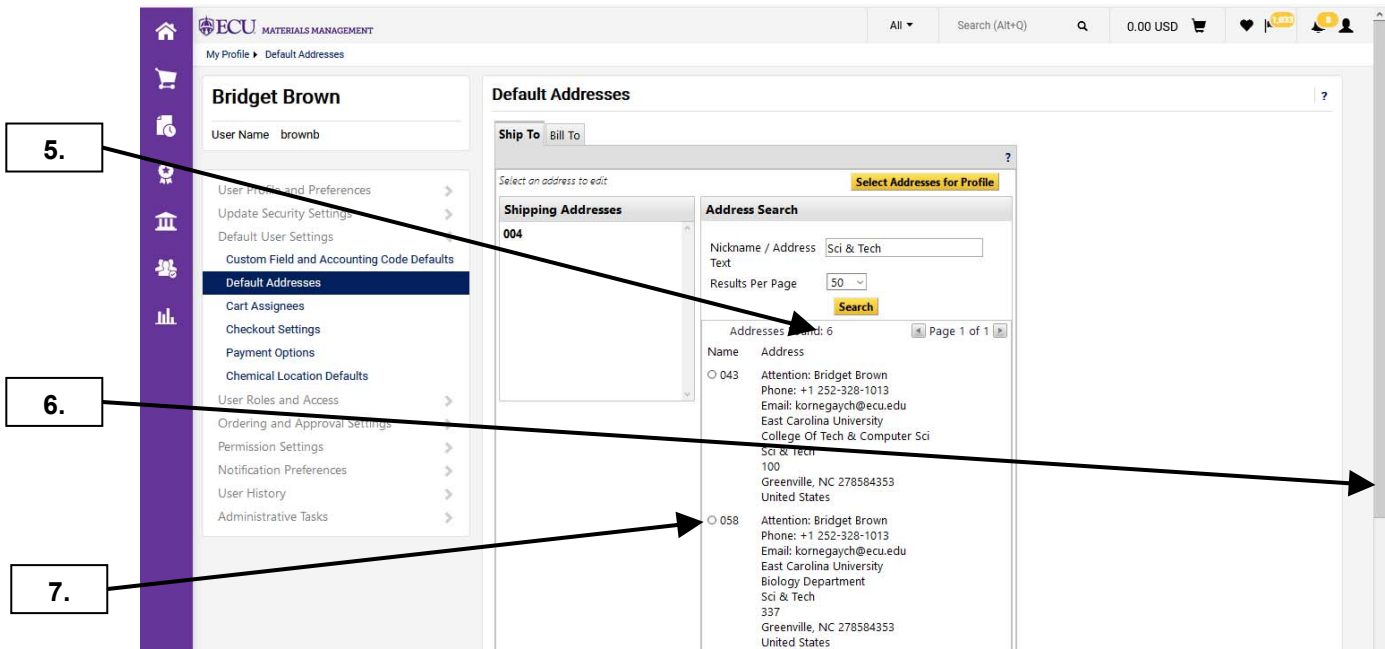
1. Click on **Select Addresses for Profile** button.



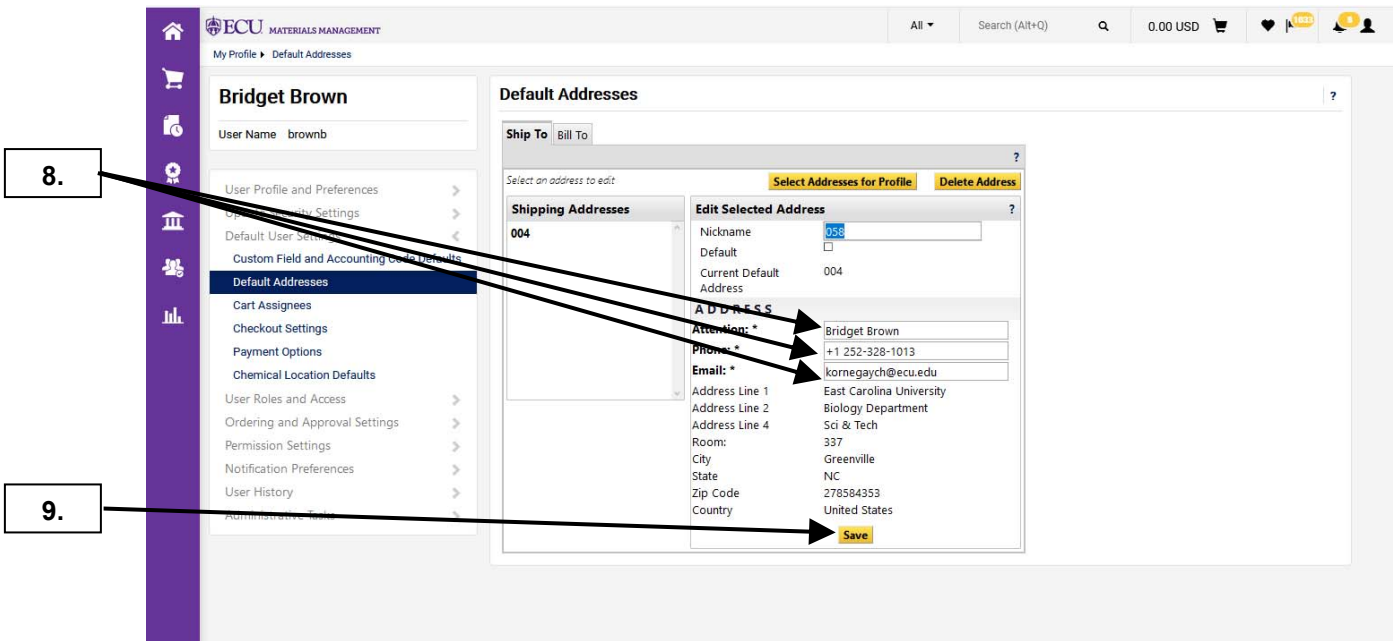
2. Enter the description in the **Nickname / Address Text** field. **Note:** Now you can enter either the ship code or Address Text in the same text box for ship code searches. Address text includes the following: Department Name, Street Address, Building, Room #, City, State, or Zip Code.
3. Change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

SHIP CODE – ADDITIONS BY DESCRIPTION

Last Updated on: 5/18/2021



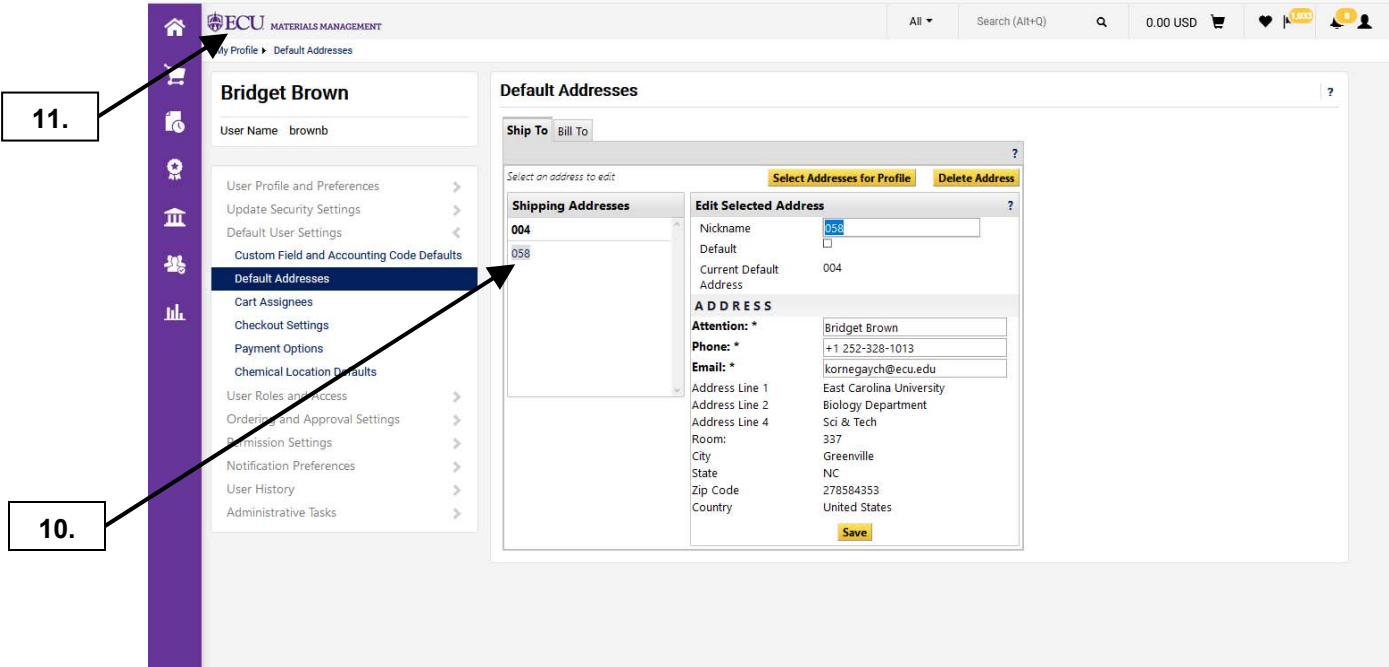
5. The number of addresses found on the criteria you entered will be displayed at the top of the results.
6. Scroll down the page to find the desired ship code.
7. Click the radio button beside the ship code for desired shipping address.



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

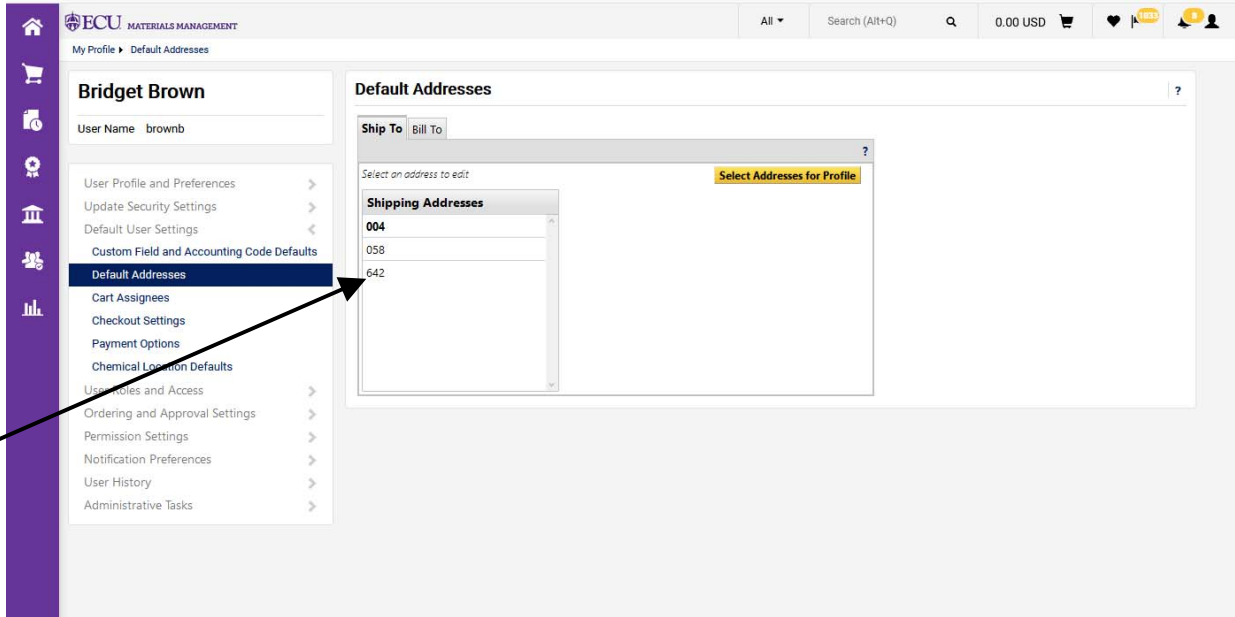
Last Updated on: 5/18/2021



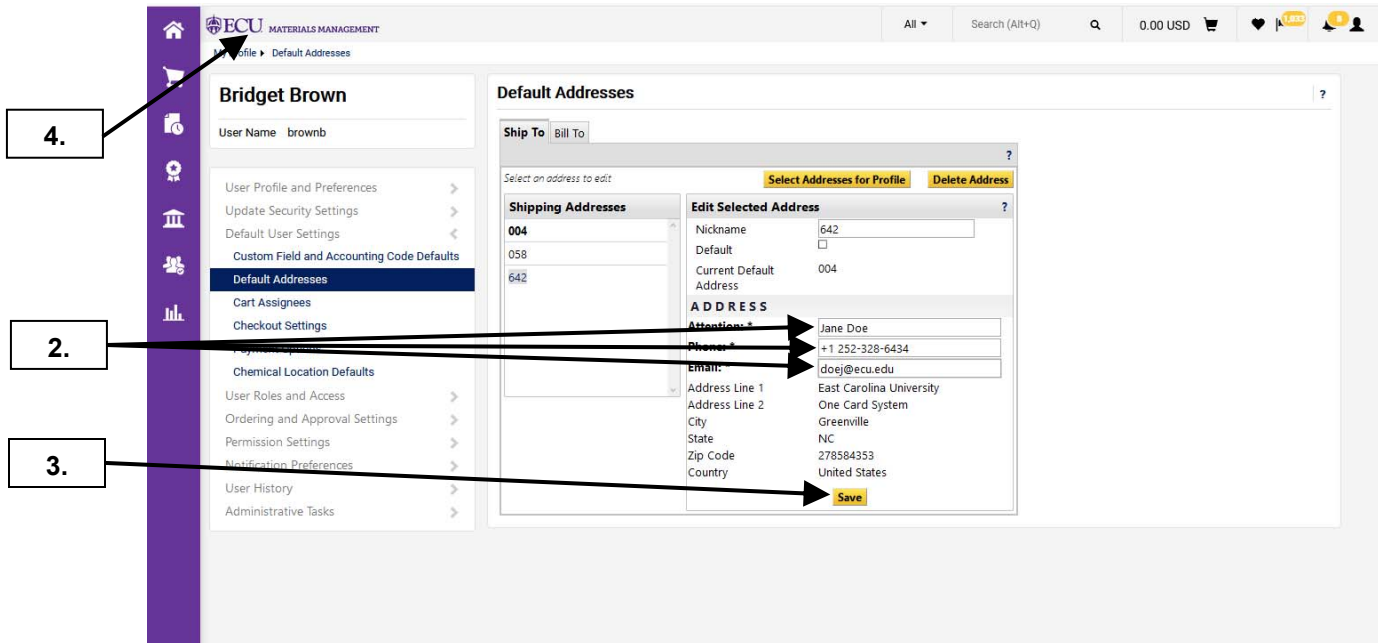
- 10. Notice that the new ship code is now in your list of values for **Shipping Addresses**.
- 11. This completes the steps for this procedure. Click on the **ECU** icon to return to the home page.

SHIP CODE – CONTACT INFORMATION EDITS

Last Updated on: 5/18/2021



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.

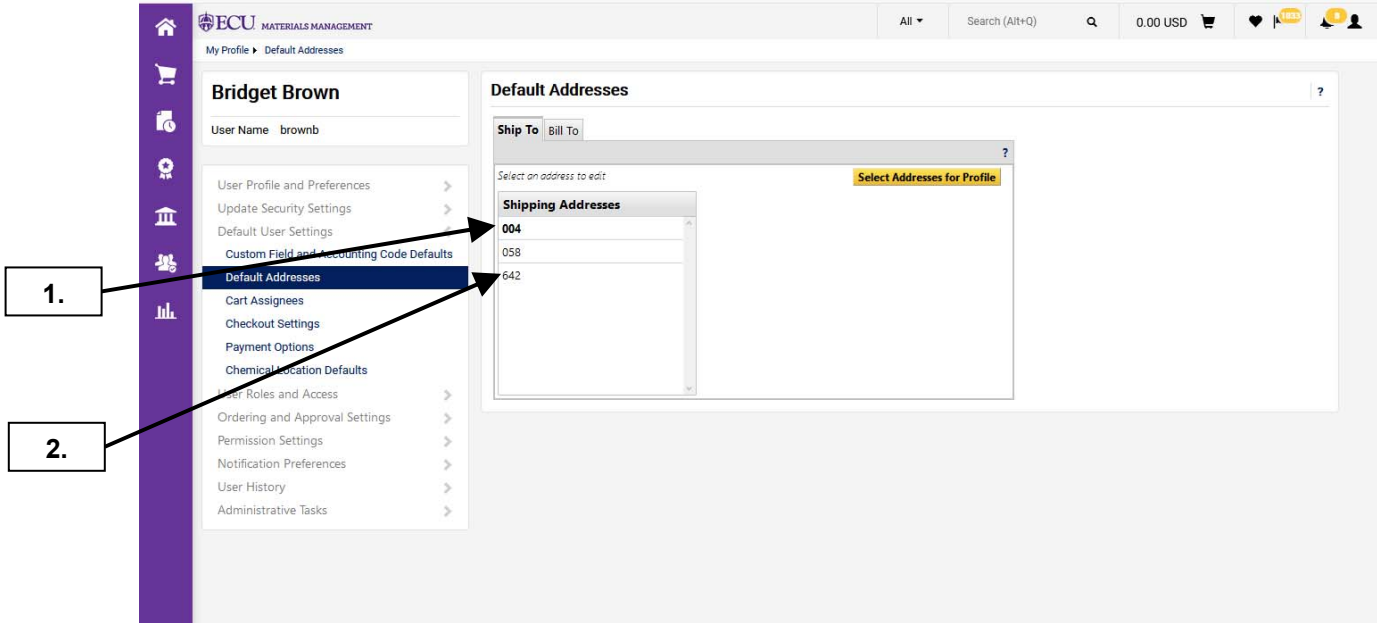
Note: The phone # must be entered in the following format: **+1 (123) 123-1234**.

3. Click the **Save** button to keep the changes.

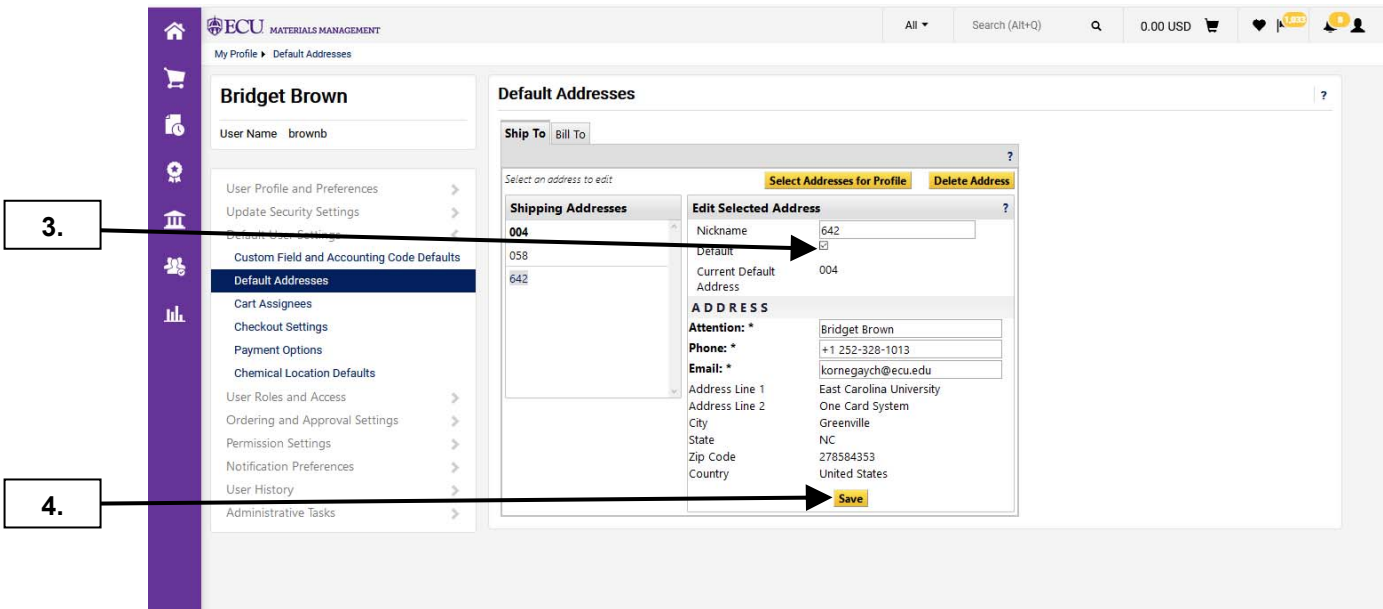
4. This completes the steps for this procedure. Click on the **ECU** icon to return to the home page.

SHIP CODE – CHANGING DEFAULT VALUE

Last Updated on: 5/18/2021



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: 5/18/2021

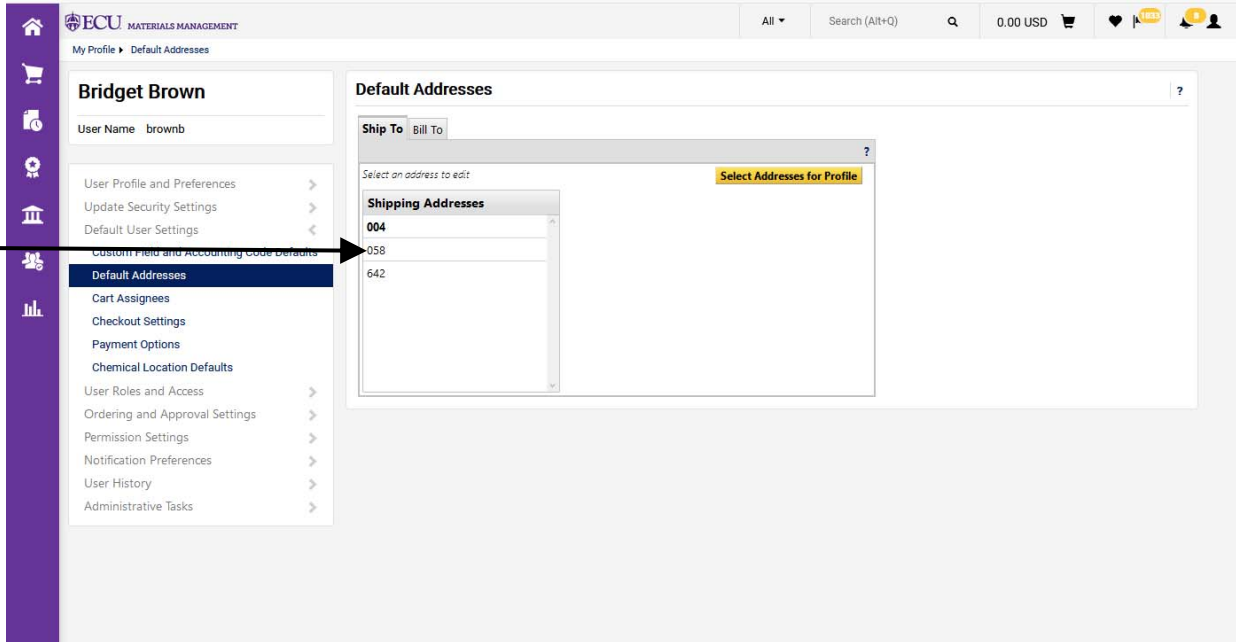
The screenshot shows the user profile page for Bridget Brown. The 'Default Addresses' section is active, displaying a list of shipping addresses. The address '642' is selected and bolded. The 'Edit Selected Address' form shows the address details for '642'. Callout box 5 points to the bolded '642' in the shipping addresses list, and callout box 6 points to the ECU icon in the sidebar.

Shipping Addresses	Edit Selected Address
004	Nickname: 642
058	Default: <input checked="" type="checkbox"/>
642	Current Default Address: 642
	ADDRESS
	Attention: * Bridget Brown
	Phone: * +1 252-328-1013
	Email: * kornegaych@ecu.edu
	Address Line 1: East Carolina University
	Address Line 2: One Card System
	City: Greenville
	State: NC
	Zip Code: 278584353
	Country: United States
	<input type="button" value="Save"/>

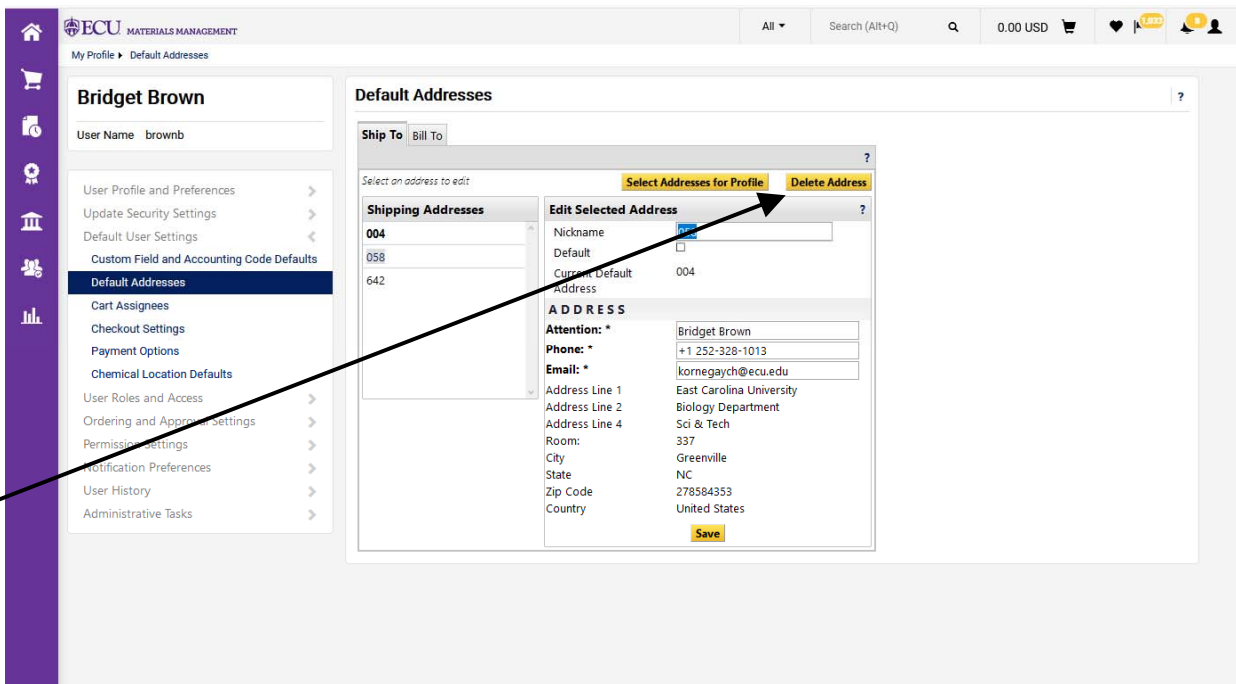
5. The value is now bold and will be the default ship code on your requisitions.
6. This completes the steps for this procedure. Click on the **ECU** icon to return to the home page.

SHIP CODE – DELETING SHIP CODES

Last Updated on: 5/18/2021



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



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

SHIP CODE – DELETING SHIP CODES

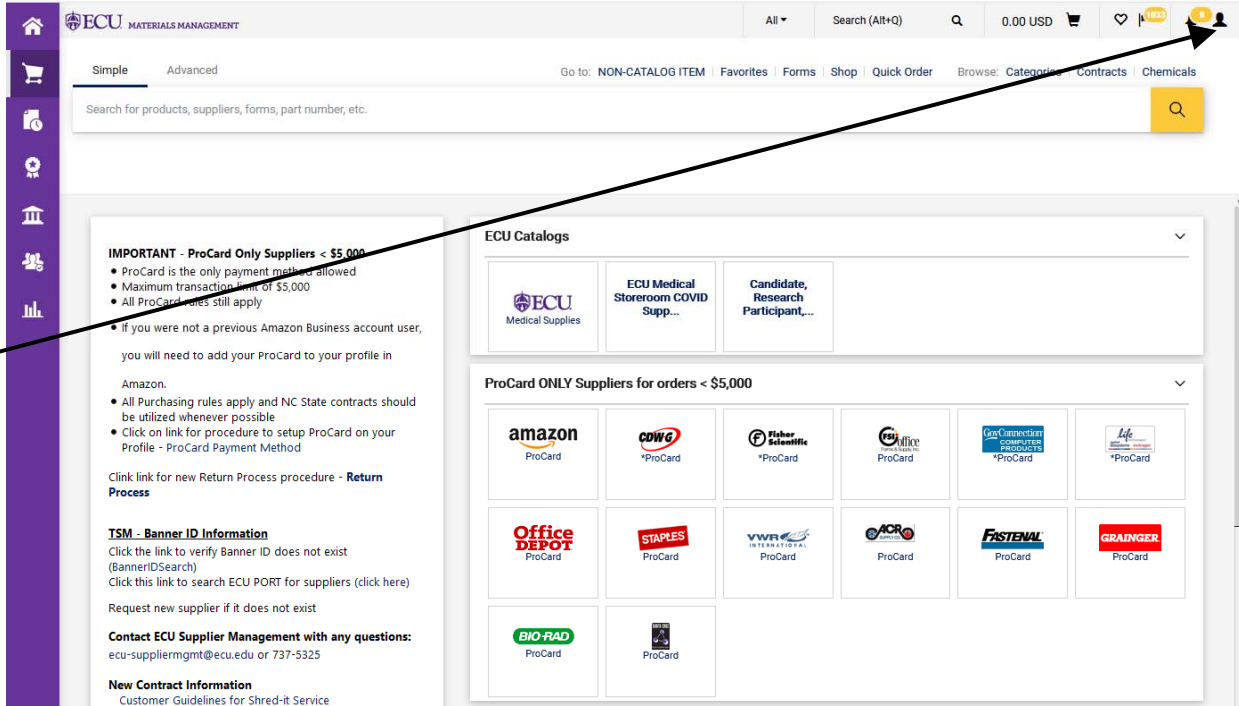
Last Updated on: 5/18/2021

The screenshot displays the user profile settings for Bridget Brown. The sidebar menu on the left includes options such as 'User Profile and Preferences', 'Update Security Settings', 'Default User Settings', 'Custom Field and Accounting Code Defaults', 'Default Addresses', 'Cart Assignees', 'Checkout Settings', 'Payment Options', 'Chemical Location Defaults', 'User Roles and Access', 'Ordering and Approval Settings', 'Permission Settings', 'Notification Preferences', 'User History', and 'Administrative Tasks'. The 'Default Addresses' option is highlighted. A modal window titled 'Default Addresses' is open, showing a list of 'Shipping Addresses' with '004' and '642' visible. A yellow button labeled 'Select Addresses for Profile' is present in the modal. Arrows point from callout boxes '3.' and '4.' to the 'Default Addresses' menu item and the modal window respectively.

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.

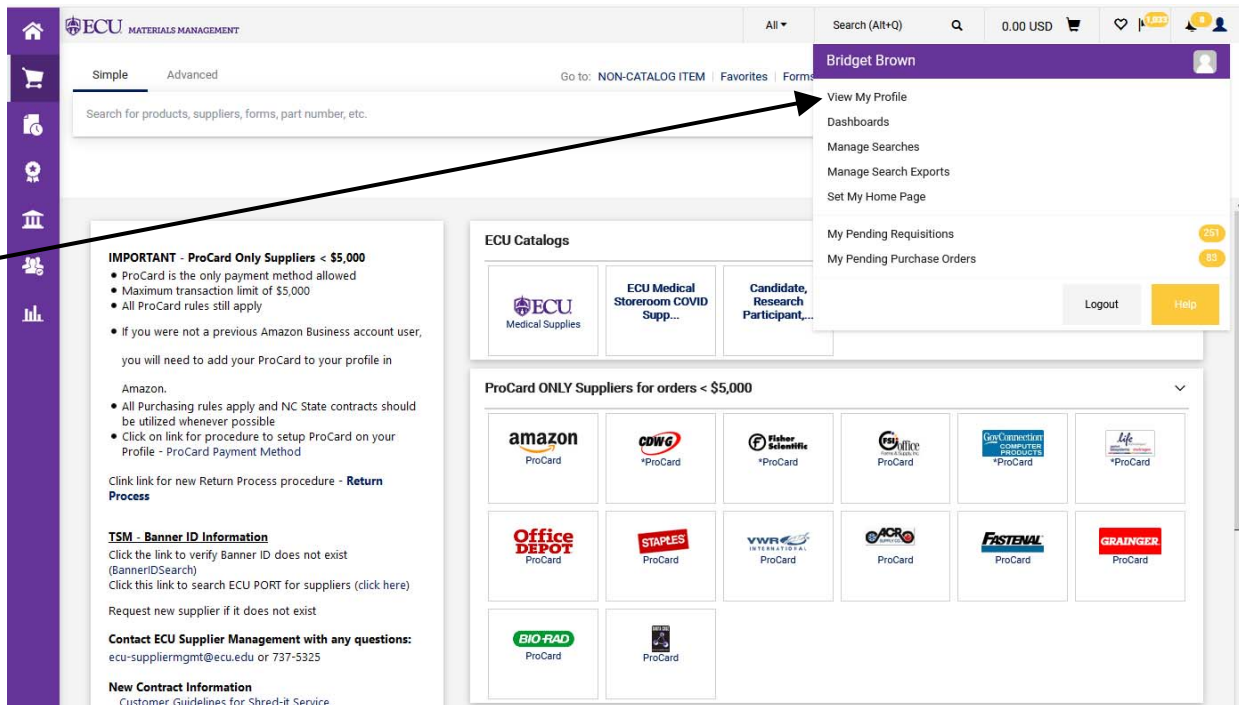
SETTING ProCARD PAYMENT OPTION

Last Updated on: 5/19/2021



1.

1. Click on **User** icon.



2.

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

SETTING ProCARD PAYMENT OPTION

Last Updated on: 5/19/2021

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. (highlighted)

Language, Time Zone and Display Settings

Early Access Participation

Guided Tour Instructions

Update Security Settings >

Default User Settings (highlighted)

User Roles and Access >

Ordering and Approval Settings >

Permission Settings >

Notification Preferences >

User History >

Administrative Tasks >

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 +

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.

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

Early Access Participation

Guided Tour Instructions

Update Security Settings >

Default User Settings <

Custom Field and Accounting Code Defaults

Default Addresses

Cart Assignees

Checkout Settings

Payment Options (highlighted)

Chemical Location Defaults

User Roles and Access >

Ordering and Approval Settings >

Permission Settings >

Notification Preferences >

User History >

Administrative Tasks >

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 +

E-mail Address *

Department * Administration and Finance (Administration and Finance)

Position -

Badge Id

Authentication Method Local

User Name * brownb

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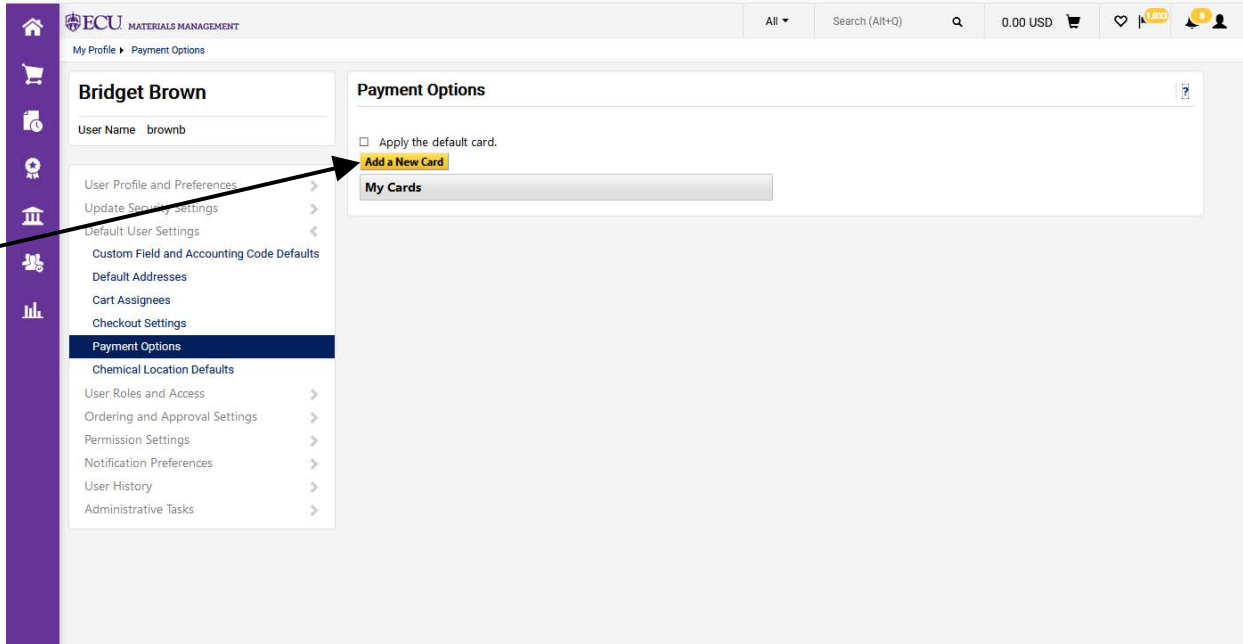
* Required Save Changes

4.

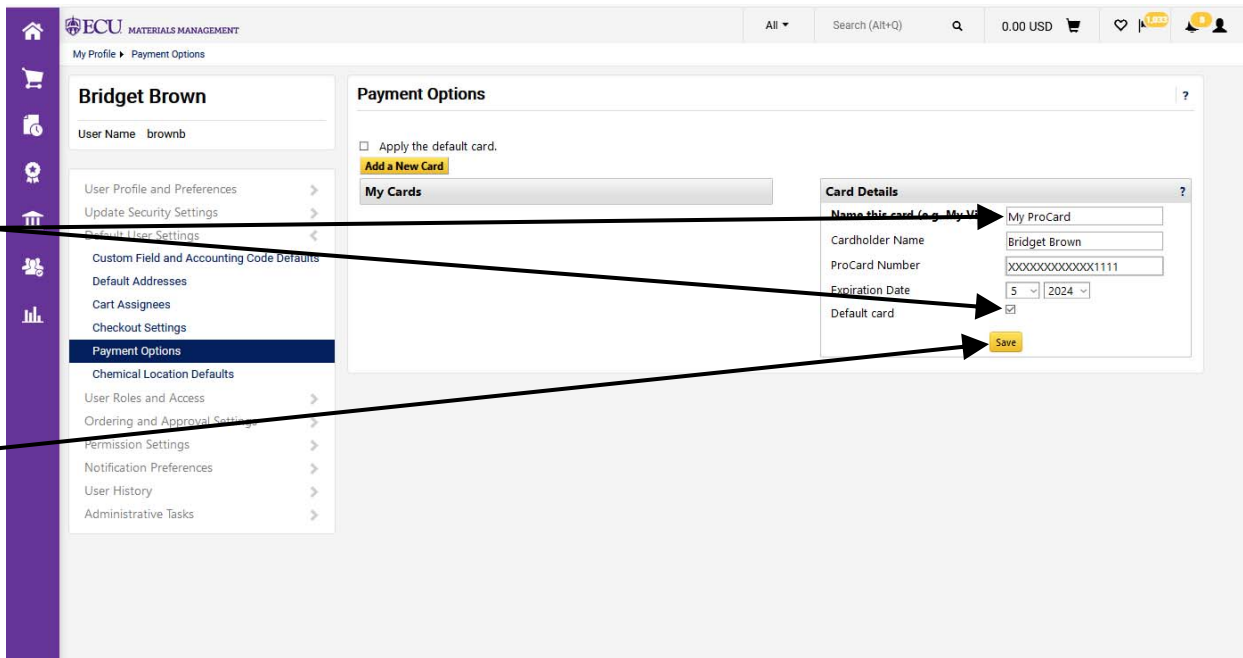
4. Click on **Payment Options** link.

SETTING ProCARD PAYMENT OPTION

Last Updated on: 5/19/2021



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



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: 5/19/2021

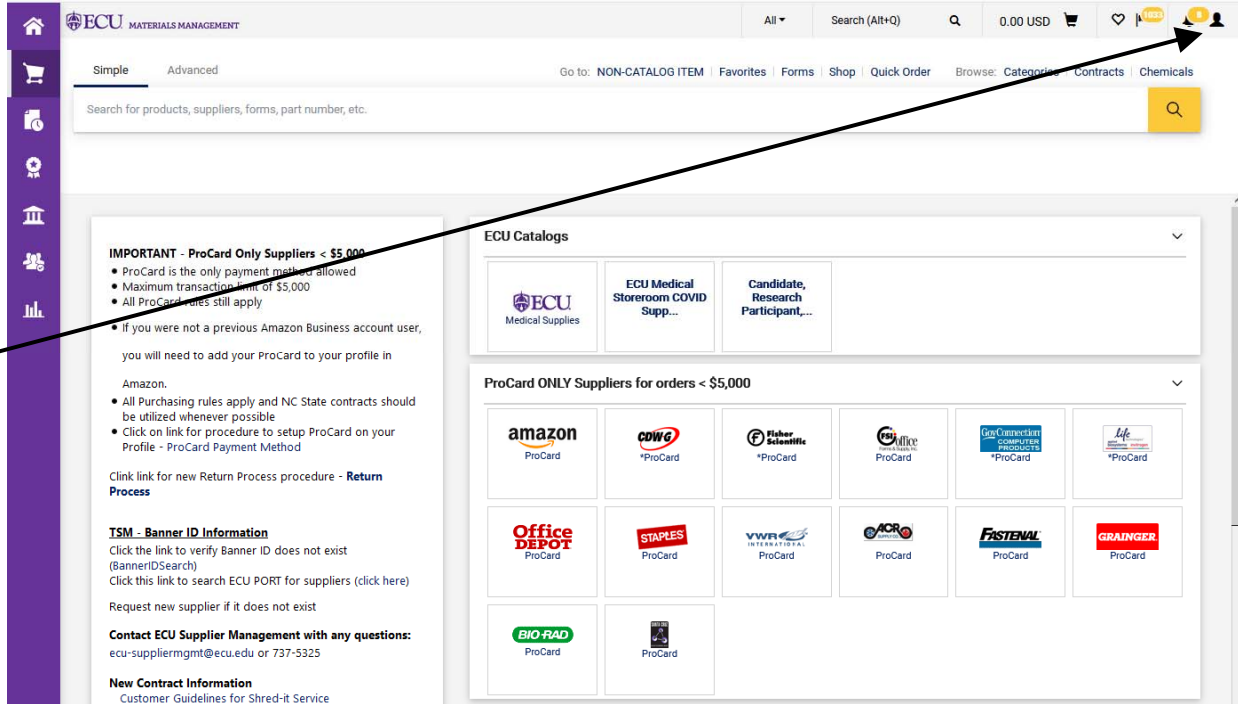
The screenshot displays the 'Payment Options' configuration page for user 'Bridget Brown'. The page is divided into three main sections:

- Left Sidebar:** A vertical navigation menu with various settings options. Item 8 points to the 'Payment Options' menu item.
- Main Content Area:**
 - Payment Options:** A section with a checkbox 'Apply the default card.' (checked) and a yellow 'Add a New Card' button. Below this is a 'My Cards' list containing 'My ProCard'.
 - Card Details:** A form for editing card information. Item 9 points to the 'Apply the default card' checkbox. The form includes fields for 'Name this card (e.g. My Visa)' (My ProCard), 'Cardholder Name' (Bridget Brown), 'ProCard Number' (XXXXXXXXXXXX1111), 'Expiration Date' (5/2024), and a 'Default card' checkbox (checked). 'Save' and 'Remove' buttons are at the bottom.
- Top Navigation Bar:** Contains the ECU logo, user name, search bar, currency (0.00 USD), and user profile icons. Item 10 points to the ECU icon.

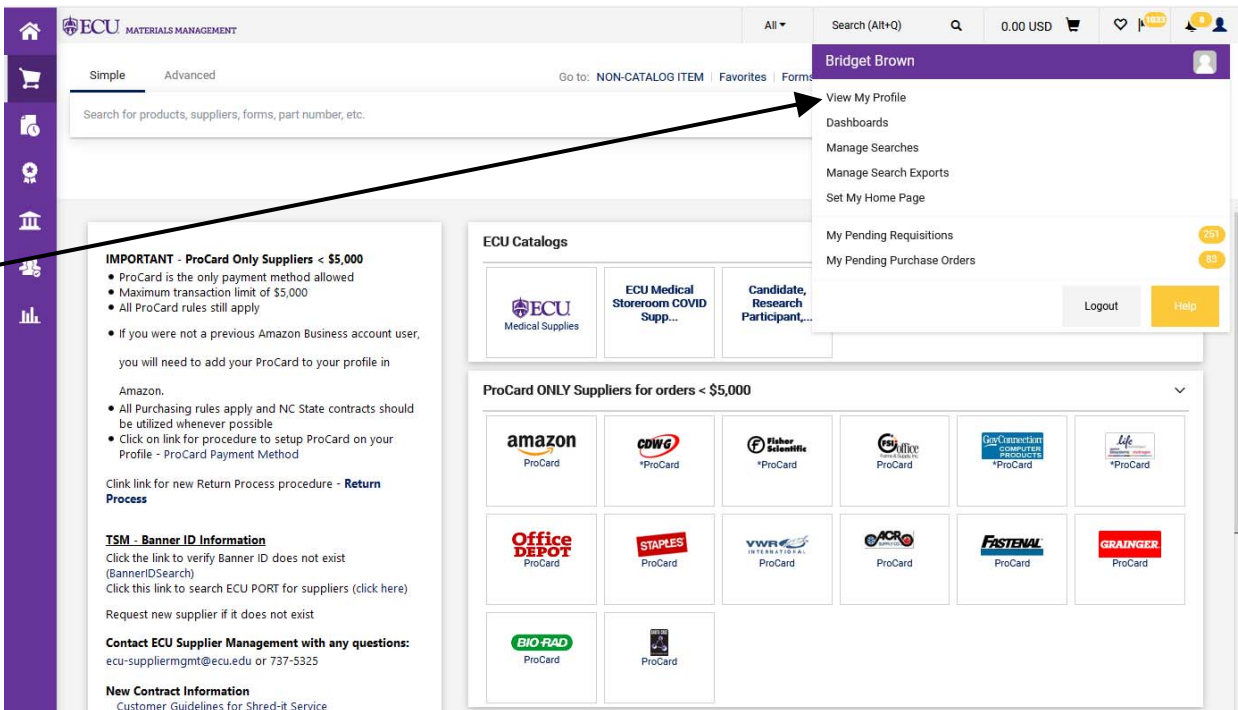
8. Note that **My ProCard** now displays in **My Cards**. You can now use this on orders for 16 punch-out suppliers that accept ProCard has a payment method in PORT.
9. Selecting **Apply the default card** check box will make your ProCard the default payment method for these suppliers: Amazon, Staples, 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 Lowe's.
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: 5/19/2021



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: 5/19/2021

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

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 >

Administrative Tasks >

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 +

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 **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

Early Access Participation

Guided Tour Instructions

Update Security Settings >

Default User Settings <

Custom Field and Accounting Code Defaults

Default Addresses

Cart Assignees

Checkout Settings

Payment Options

Chemical Location Defaults

User Roles and Access >

Ordering and Approval Settings >

Permission Settings >

Notification Preferences >

User History >

Administrative Tasks >

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 +

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

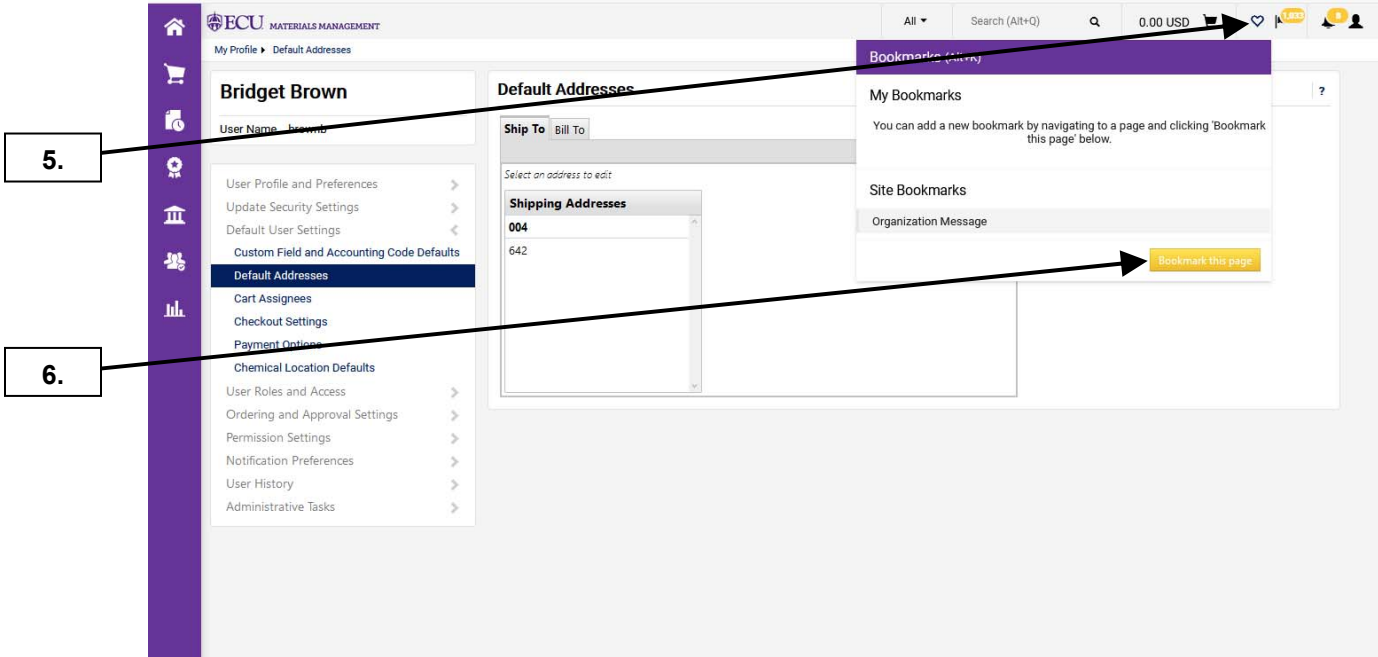
* Required

Save Changes

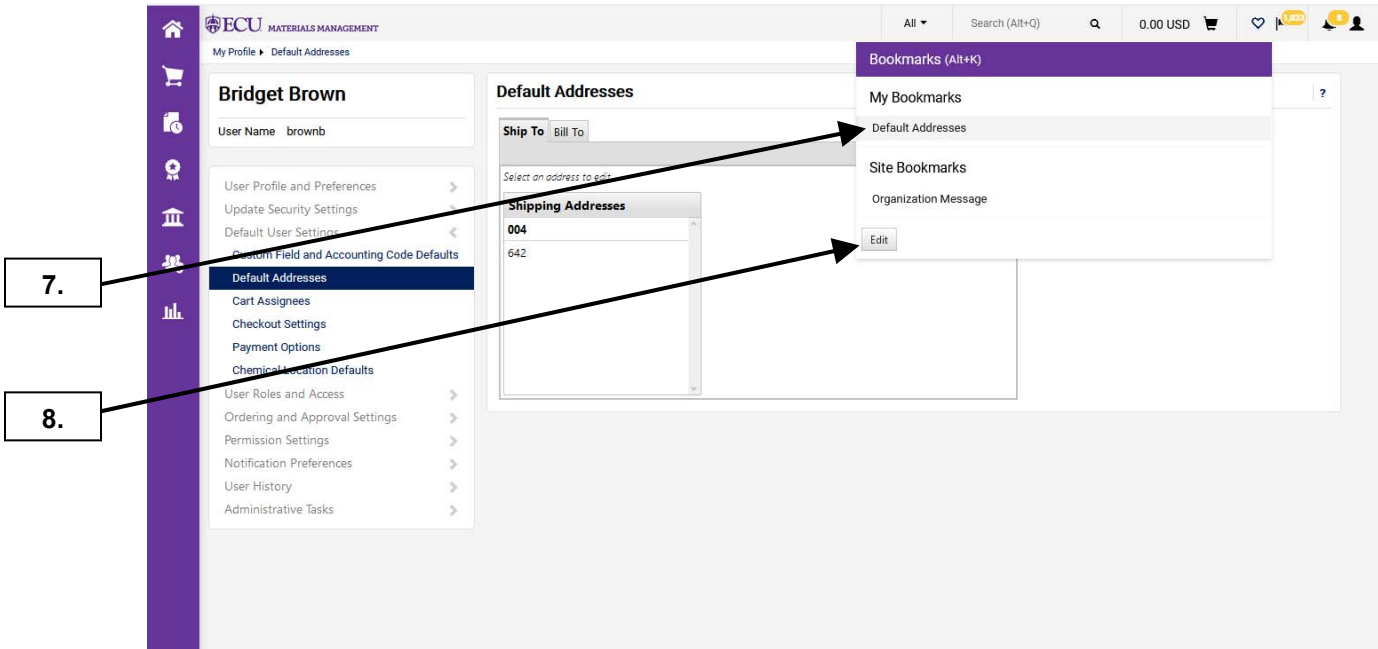
4. Click on **Default Addresses** link.

BOOKMARKS – CREATING, RENAMING, AND USING

Last Updated on: 5/19/2021



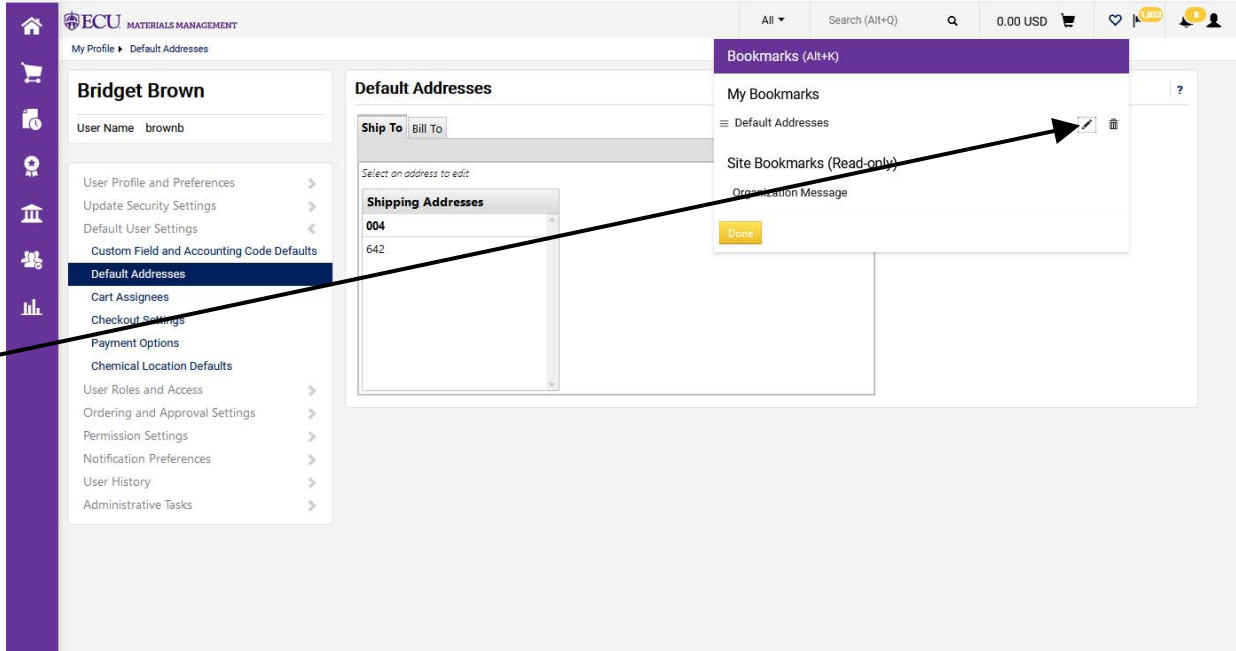
5. Click on **heart** and **Bookmarks** fly-out menu will be displayed.
6. Click on **Bookmark this page** link.



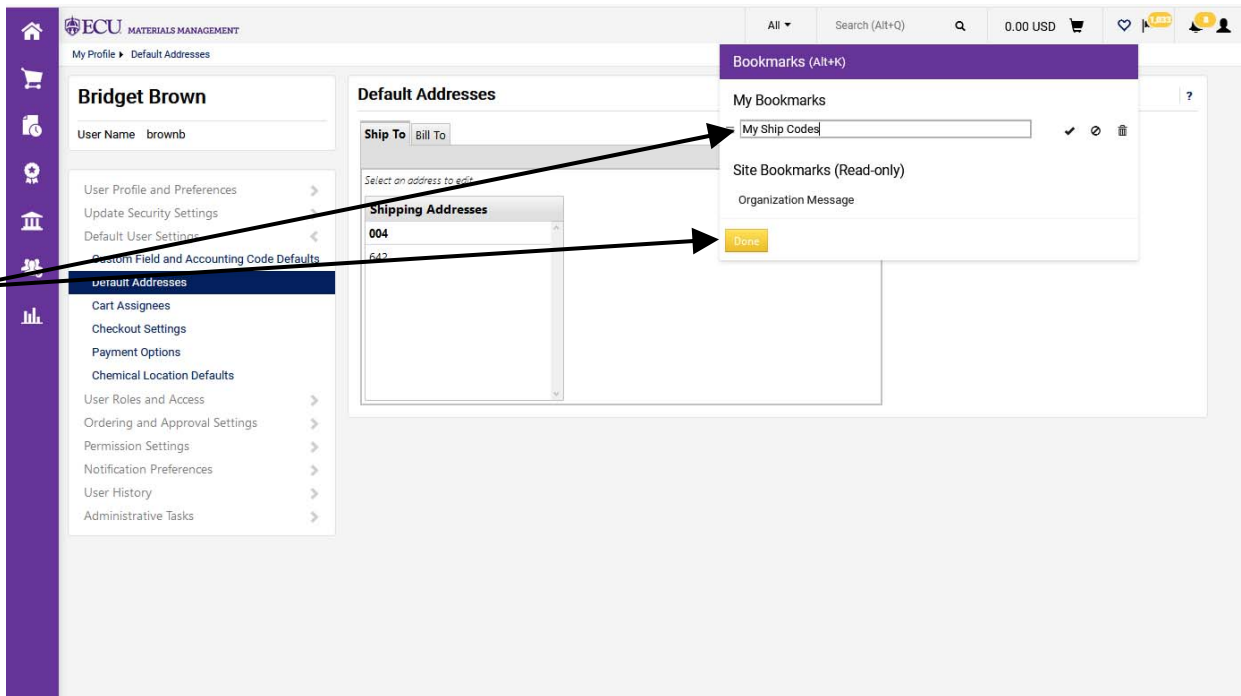
7. Note that new bookmark has been created.
8. To personalize the bookmark name, click on **Edit** button.

BOOKMARKS – CREATING, RENAMING, AND USING

Last Updated on: 5/19/2021



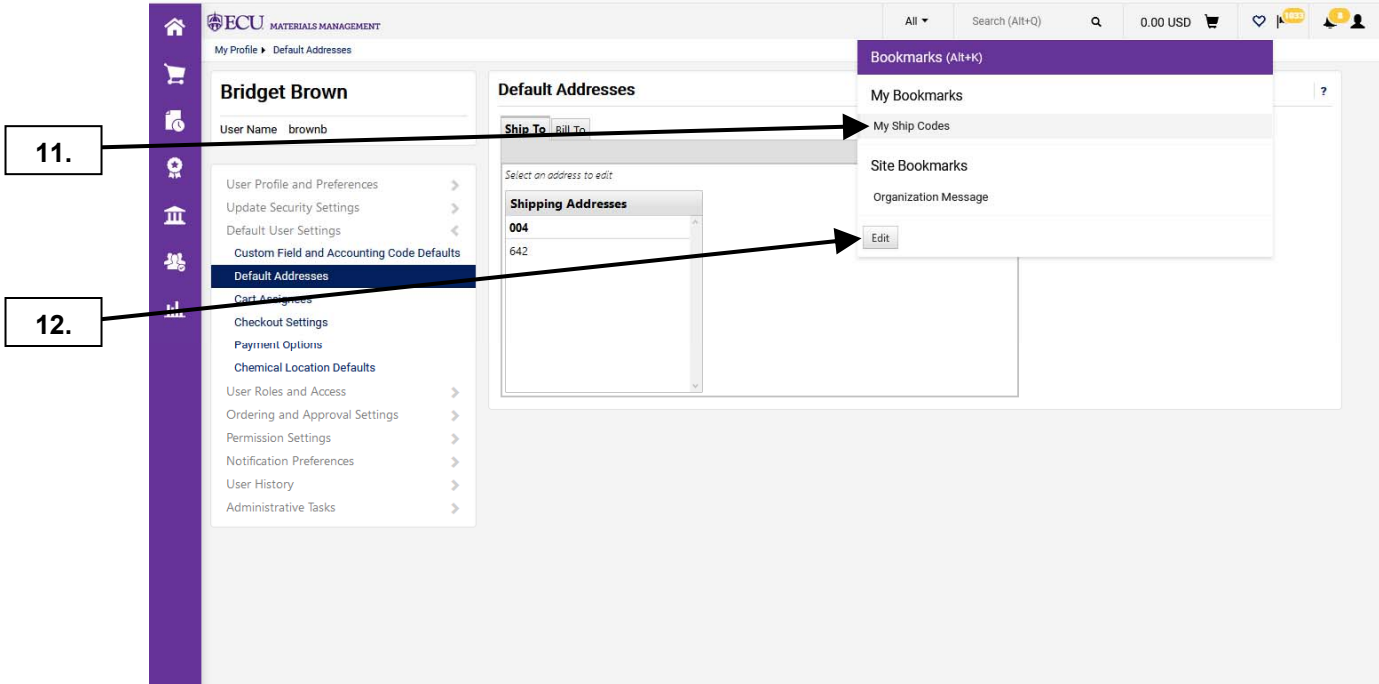
9. Click on the **Rename** icon.



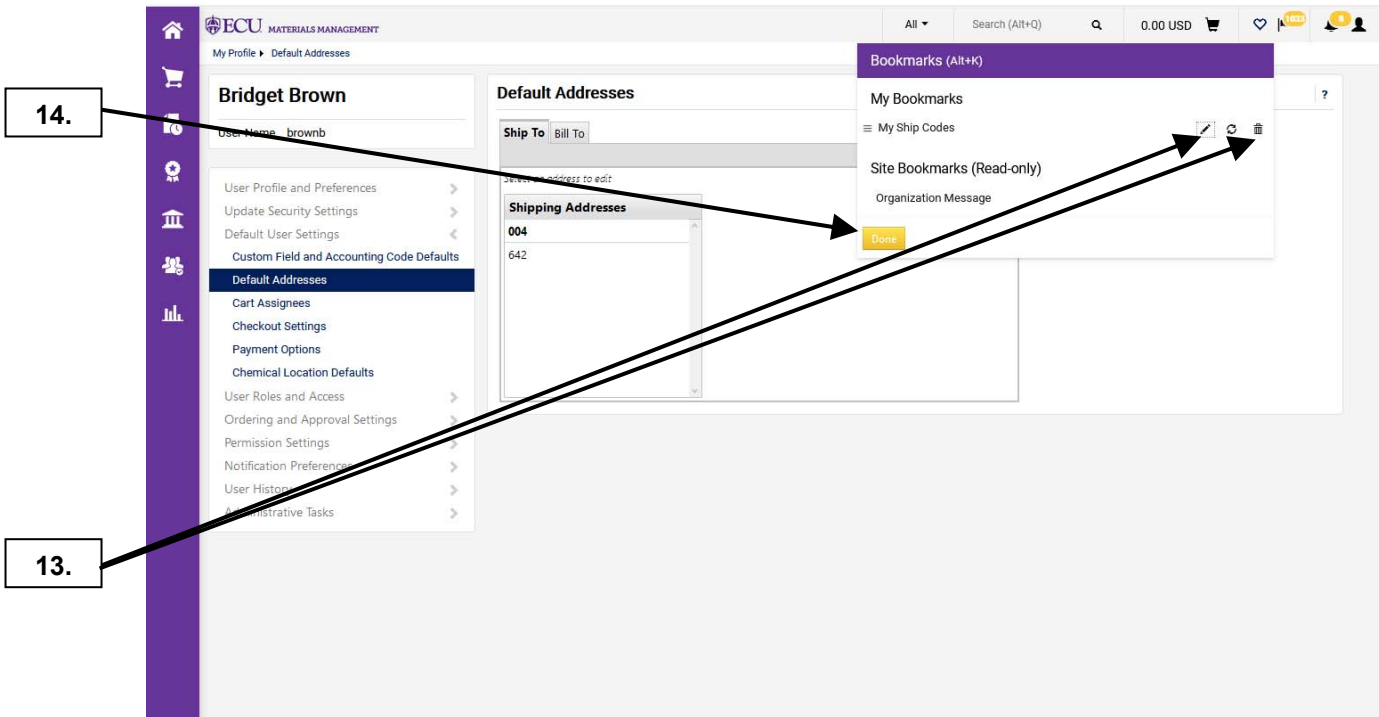
10. Rename bookmark and click **Done** button.

BOOKMARKS – CREATING, RENAMING, AND USING

Last Updated on: 5/19/2021



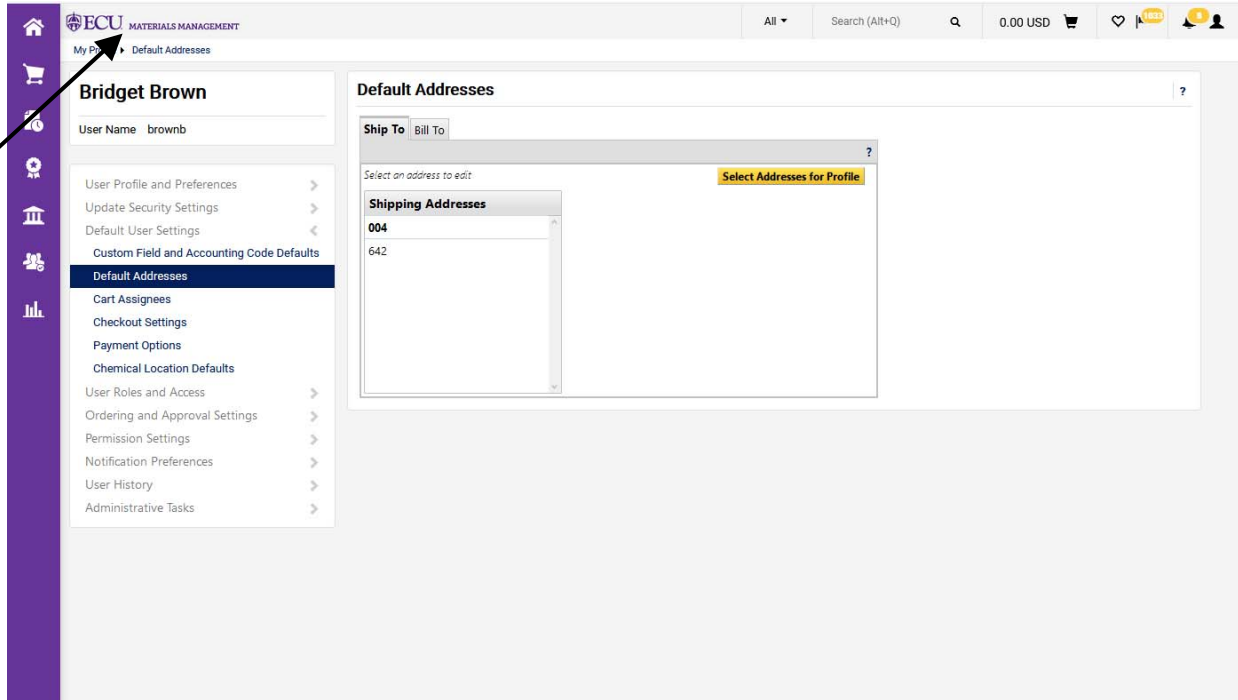
- 11. Note that the bookmark name has been updated.
- 12. To make corrections/changes, click on **Edit** button.



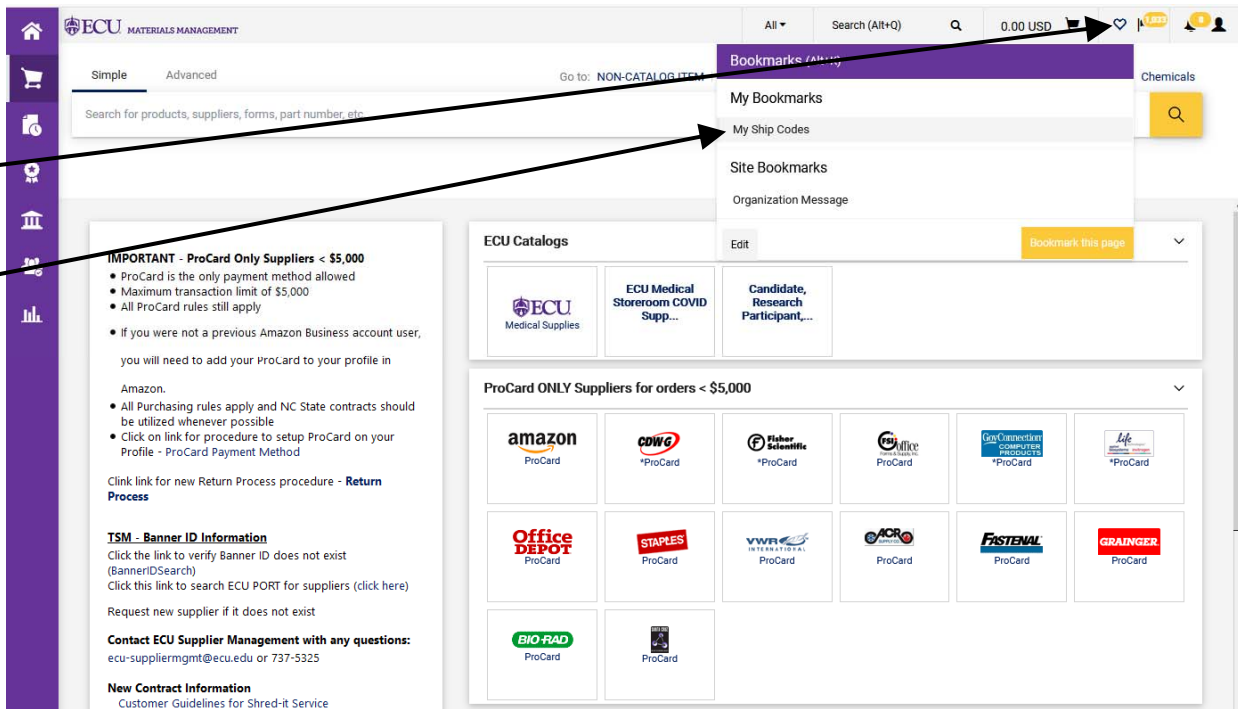
- 13. Note that you can **Rename**, **Reset**, or **Remove** the bookmark.
- 14. Click **Done** button.

BOOKMARKS – CREATING, RENAMING, AND USING

Last Updated on: 5/19/2021



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

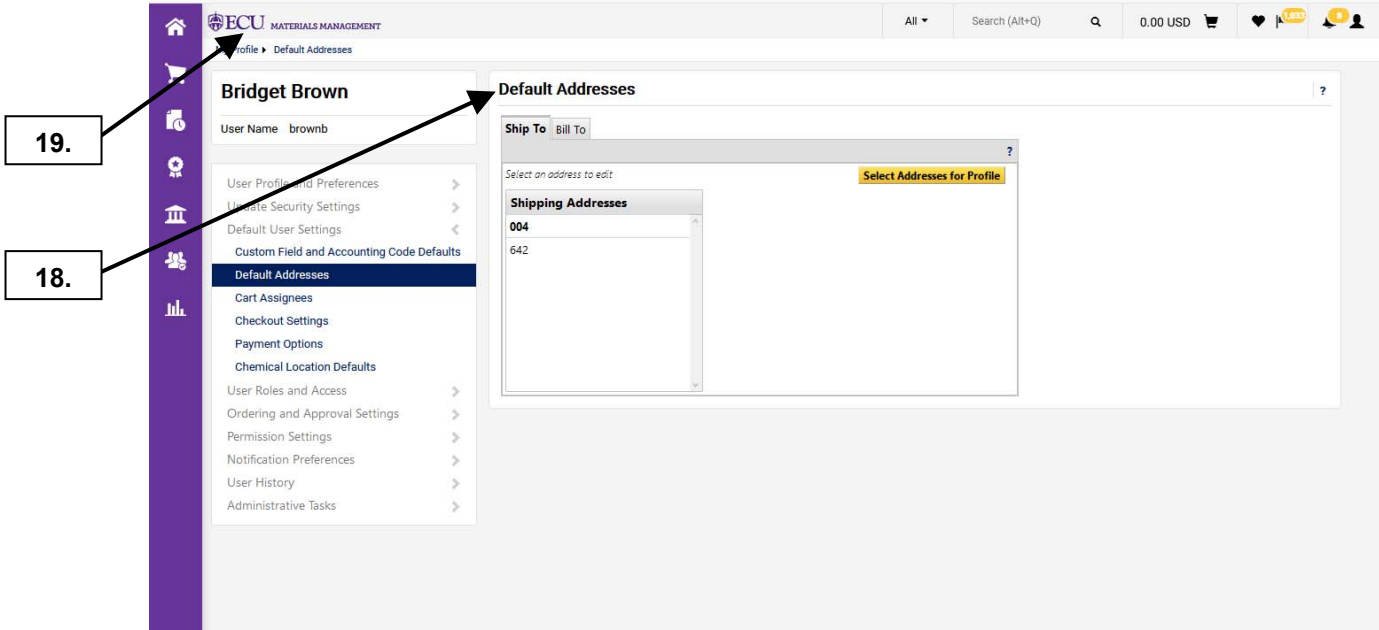


16. Click on **heart** and **Bookmarks** fly-out menu will be displayed.

17. Click on your **Bookmark**.

BOOKMARKS – CREATING, RENAMING, AND USING

Last Updated on: 5/19/2021

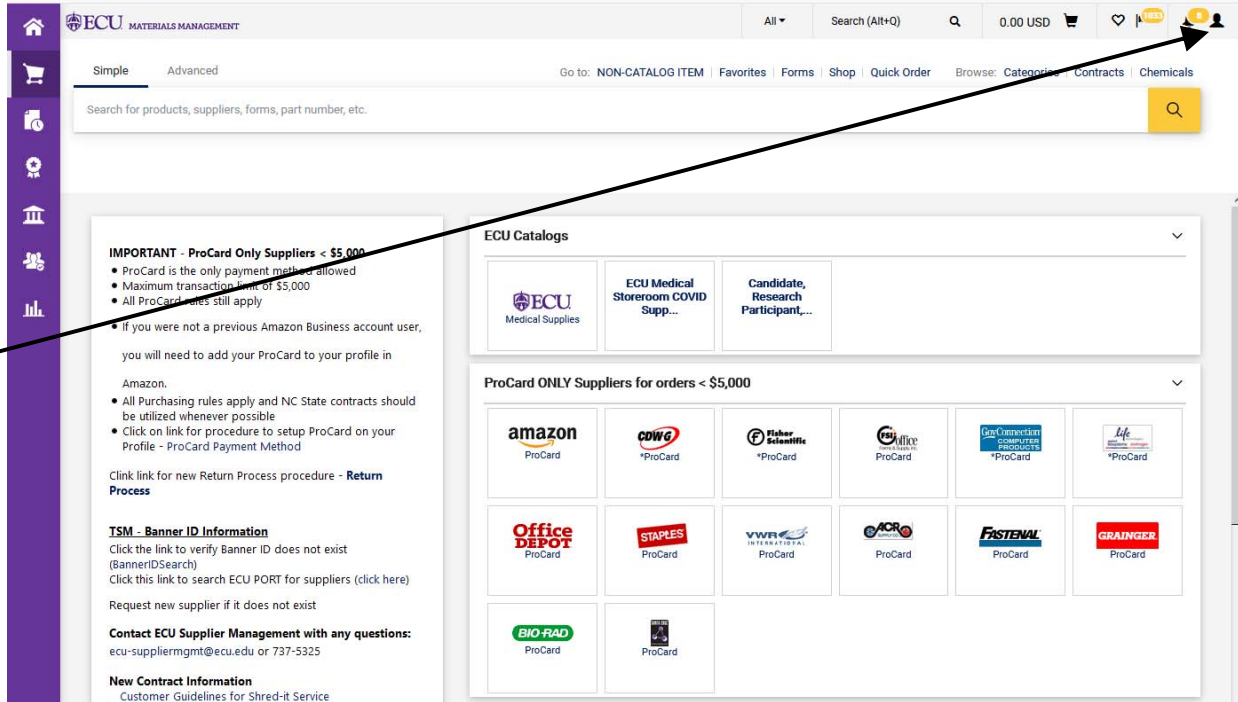


18. The bookmark takes you to **Default Addresses** ship code page.

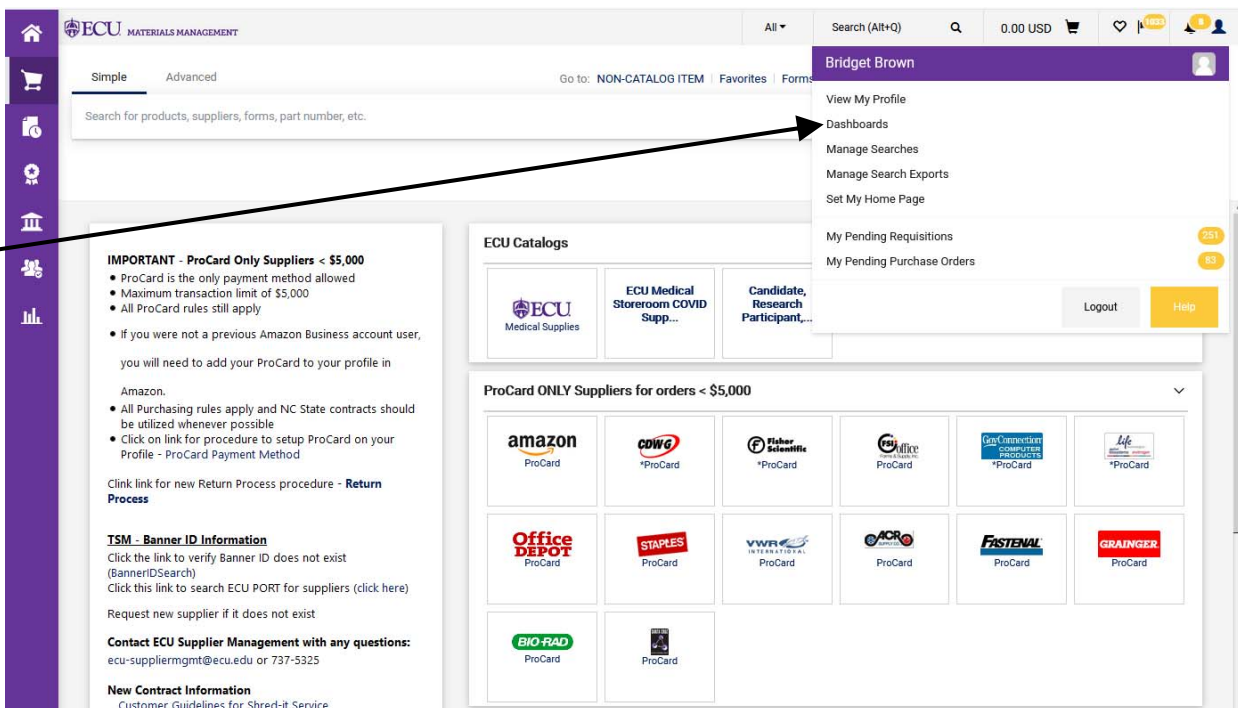
19. This completes the steps for using this procedure. Click on **ECU** icon to return to home page.

CREATING PERSONAL DASHBOARD

Last Updated on: 5/19/2021



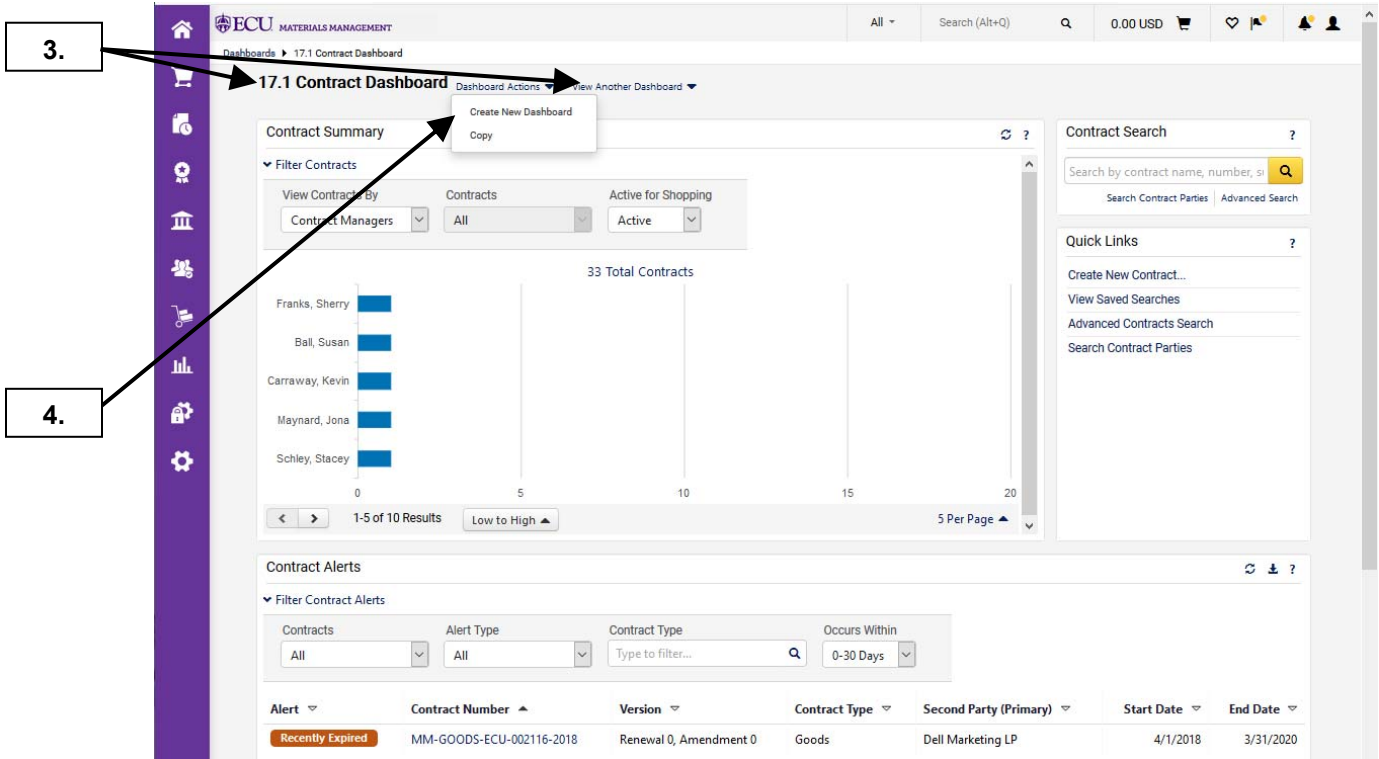
1. By utilizing configurable dashboards, you can emphasize important task and reduce the time it takes to search for features and menus. To create a Personal Dashboard, click on **User** icon.



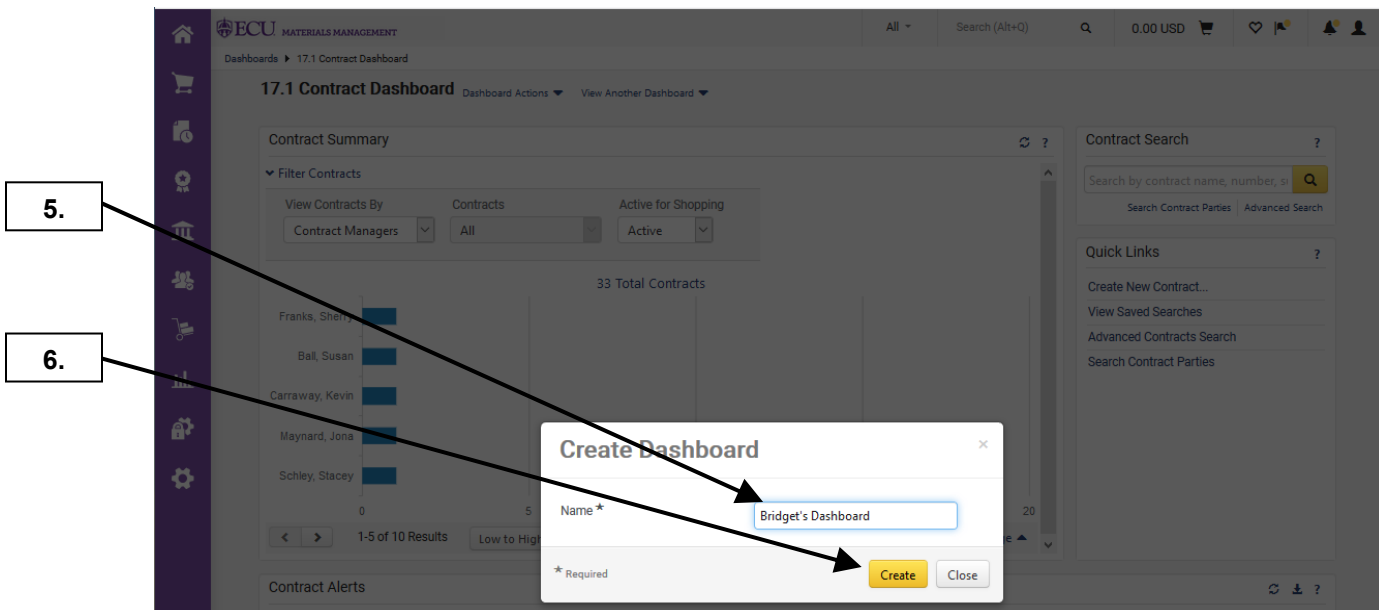
2. From fly-out menu, select **Dashboards**.

CREATING PERSONAL DASHBOARD

Last Updated on: 5/19/2021



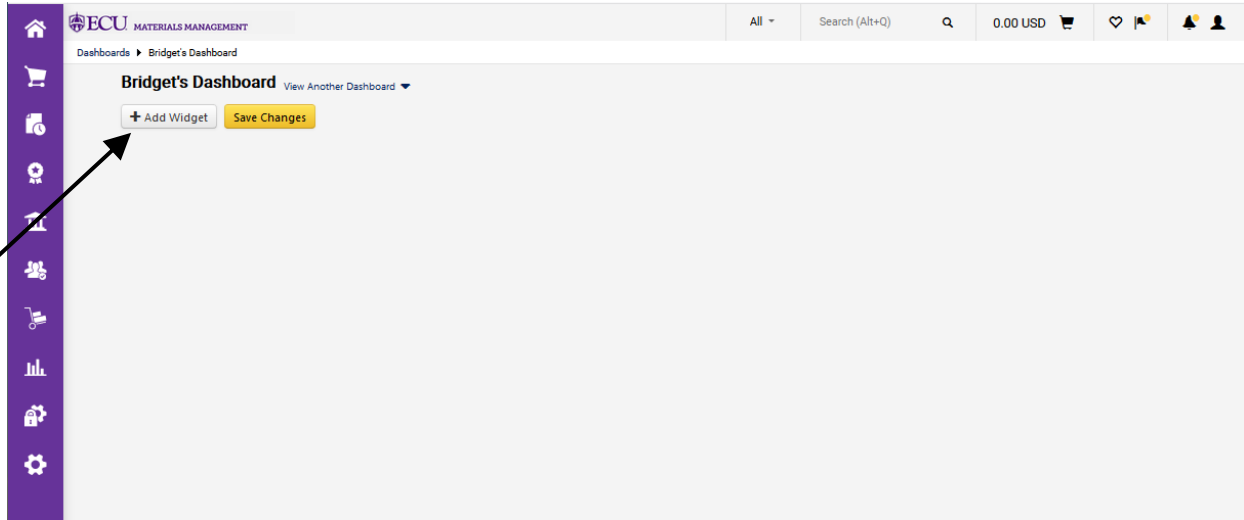
3. Default Dashboards can be found under the drop-down menu View Another Dashboard.
4. For this example, we will create a personal Dashboard. Click on **Create Dashboard** under the **Dashboard Actions** dropdown menu.



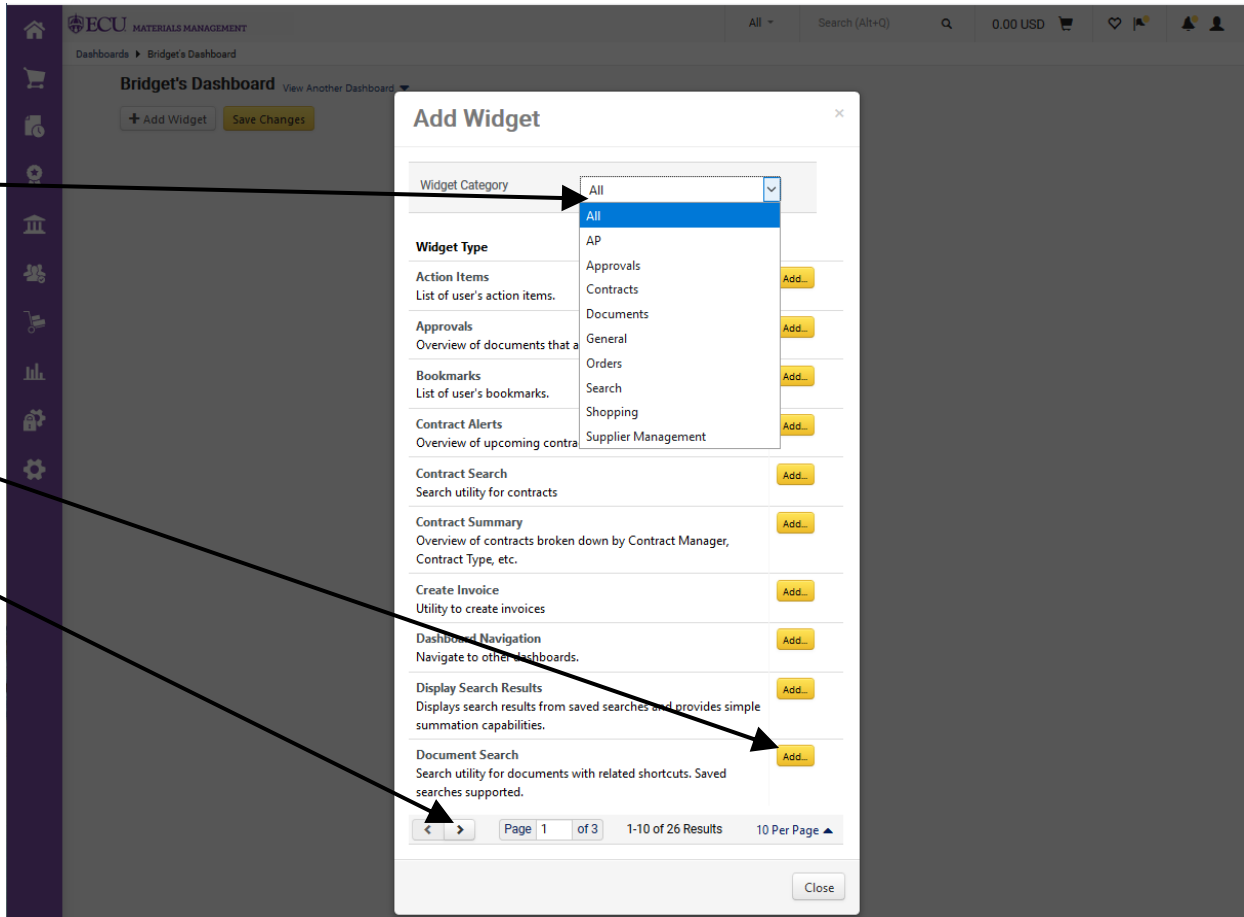
5. Enter an appropriate **Dashboard** name.
6. Click on **Create** button.

CREATING PERSONAL DASHBOARD

Last Updated on: 5/19/2021



7. Click on + Add Widget button.



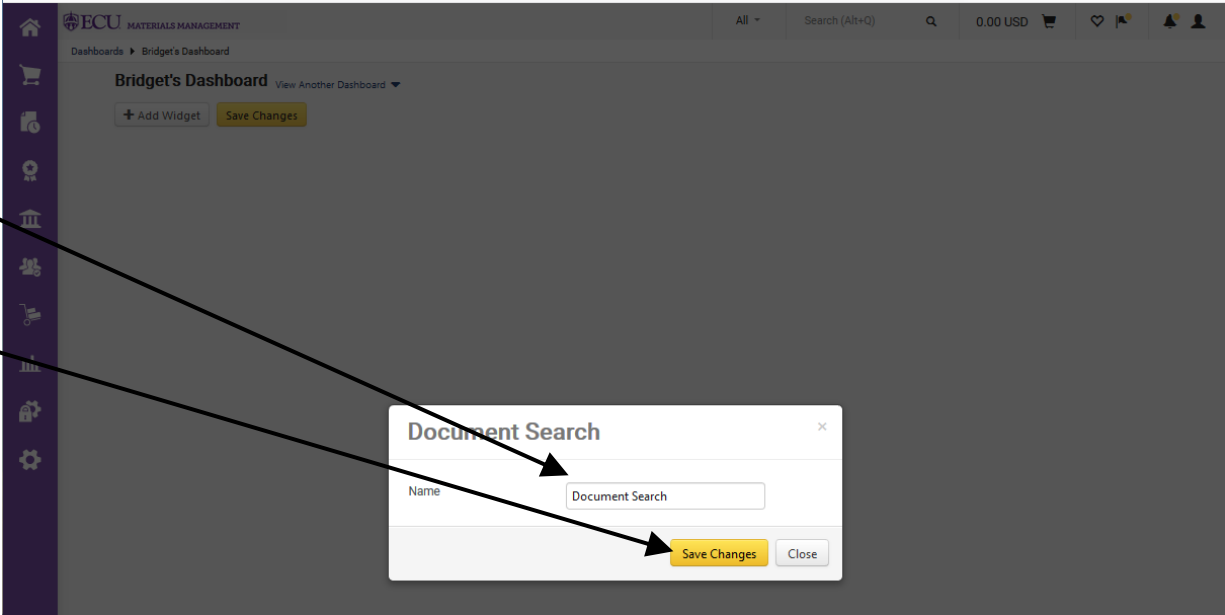
8. You can select a **Widget Category** from the drop-down box to refine results.

9. With All Category selected, you see all options by clicking through the pages.

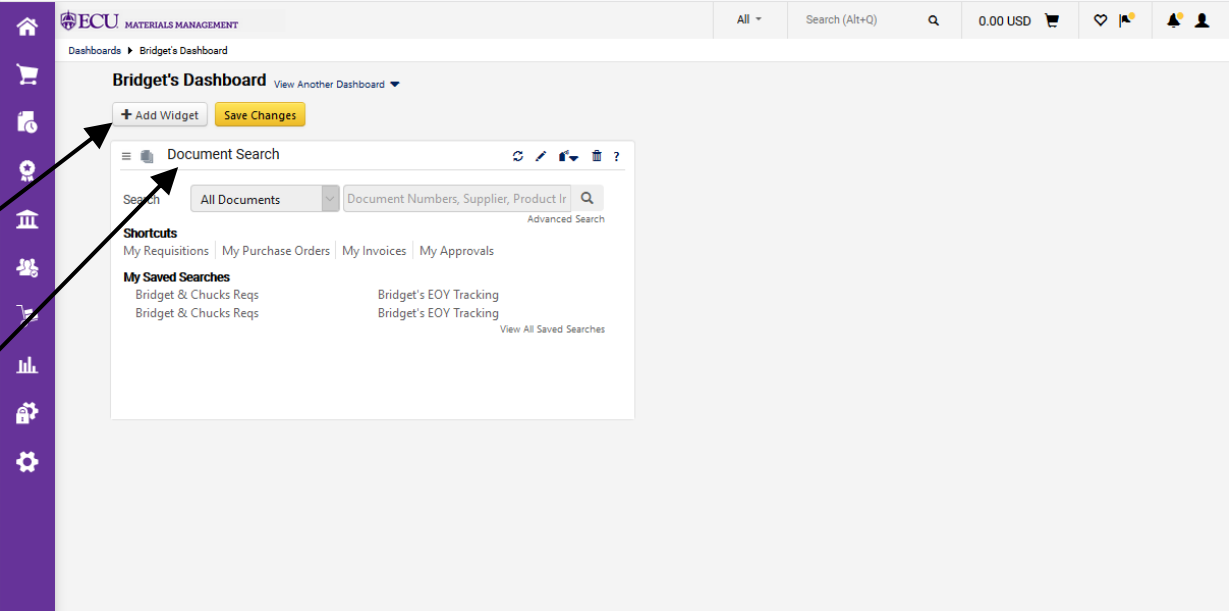
10. Select desired **Widget Type** and click the **Add...** button.

CREATING PERSONAL DASHBOARD

Last Updated on: 5/19/2021



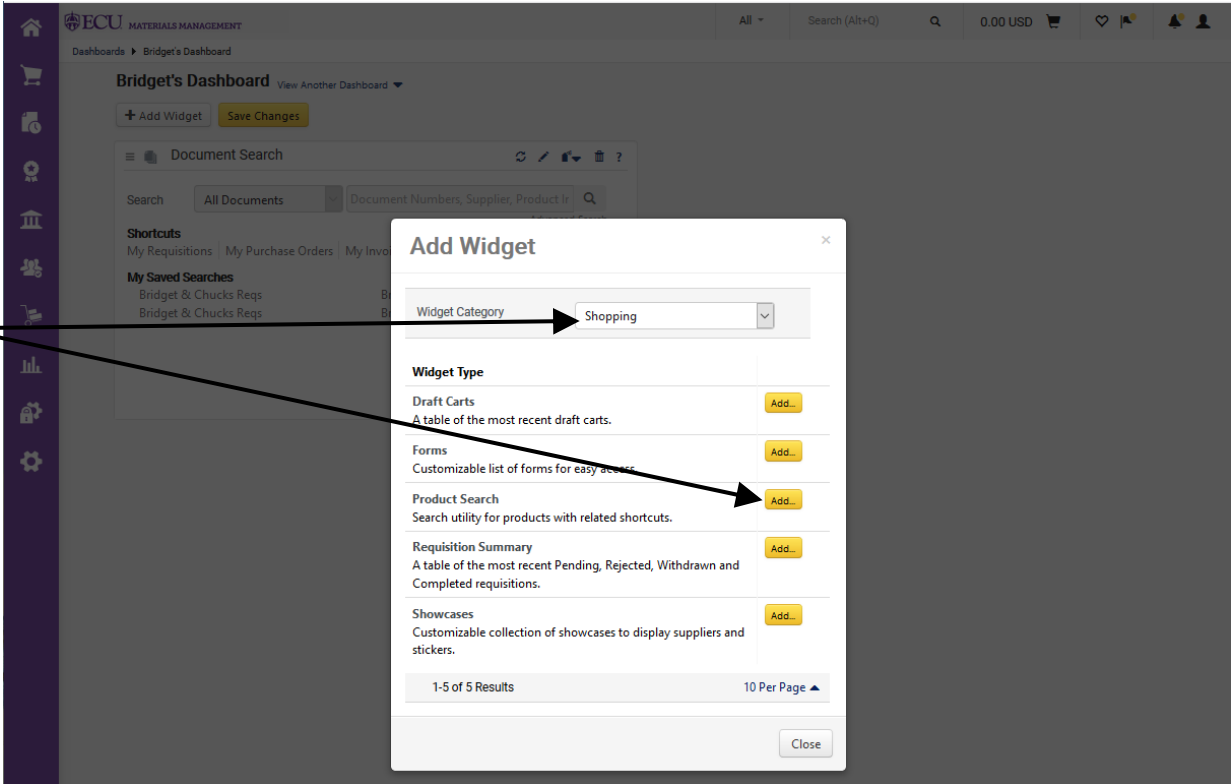
- 11. You can change **Name** of widget or use default name.
- 12. Click **Save Changes** button.



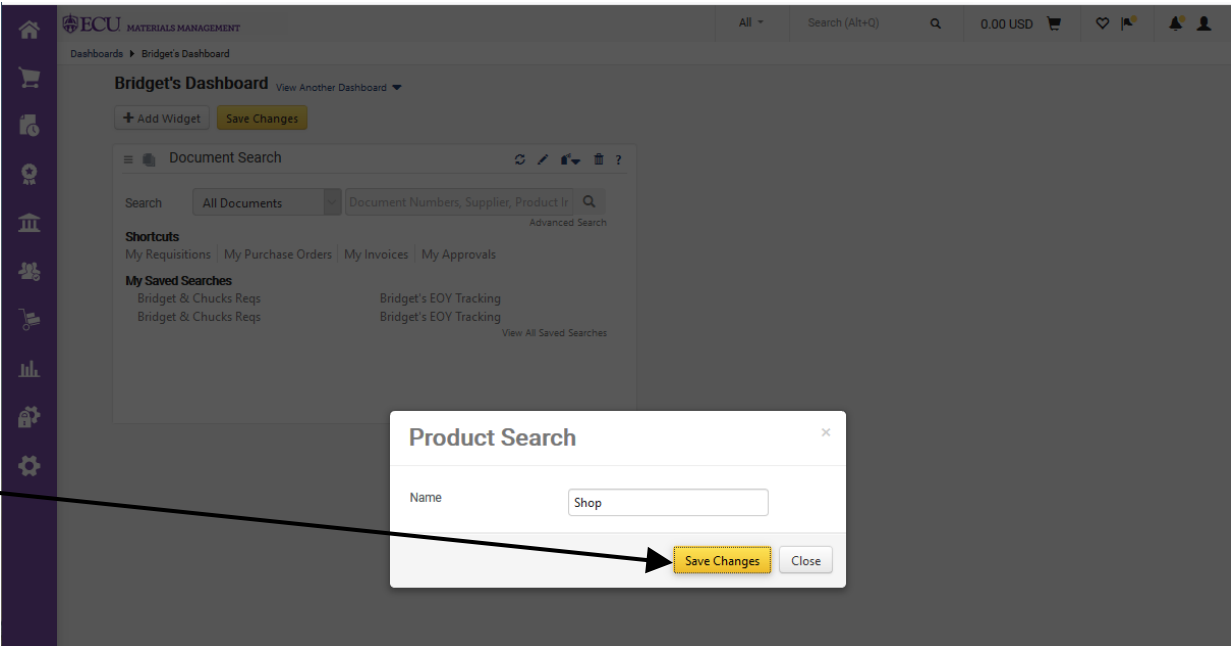
- 13. Note that new widget has been added to dashboard.
- 14. Click on + **Add Widget** button.

CREATING PERSONAL DASHBOARD

Last Updated on: 5/19/2021



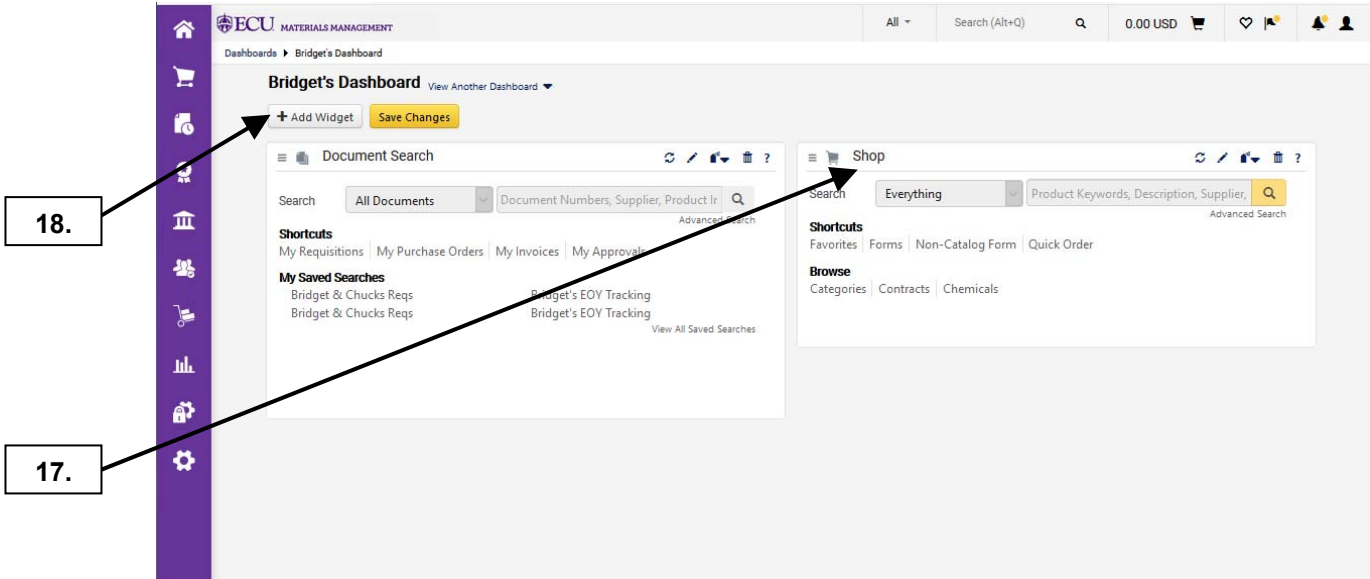
15. After selecting desired **Widget Category** from the drop-down box, click **Add...** button corresponding with the desired **Widget Type**. For this example, we will use the Shopping **Widget Category** and select the **Product Search** widget.



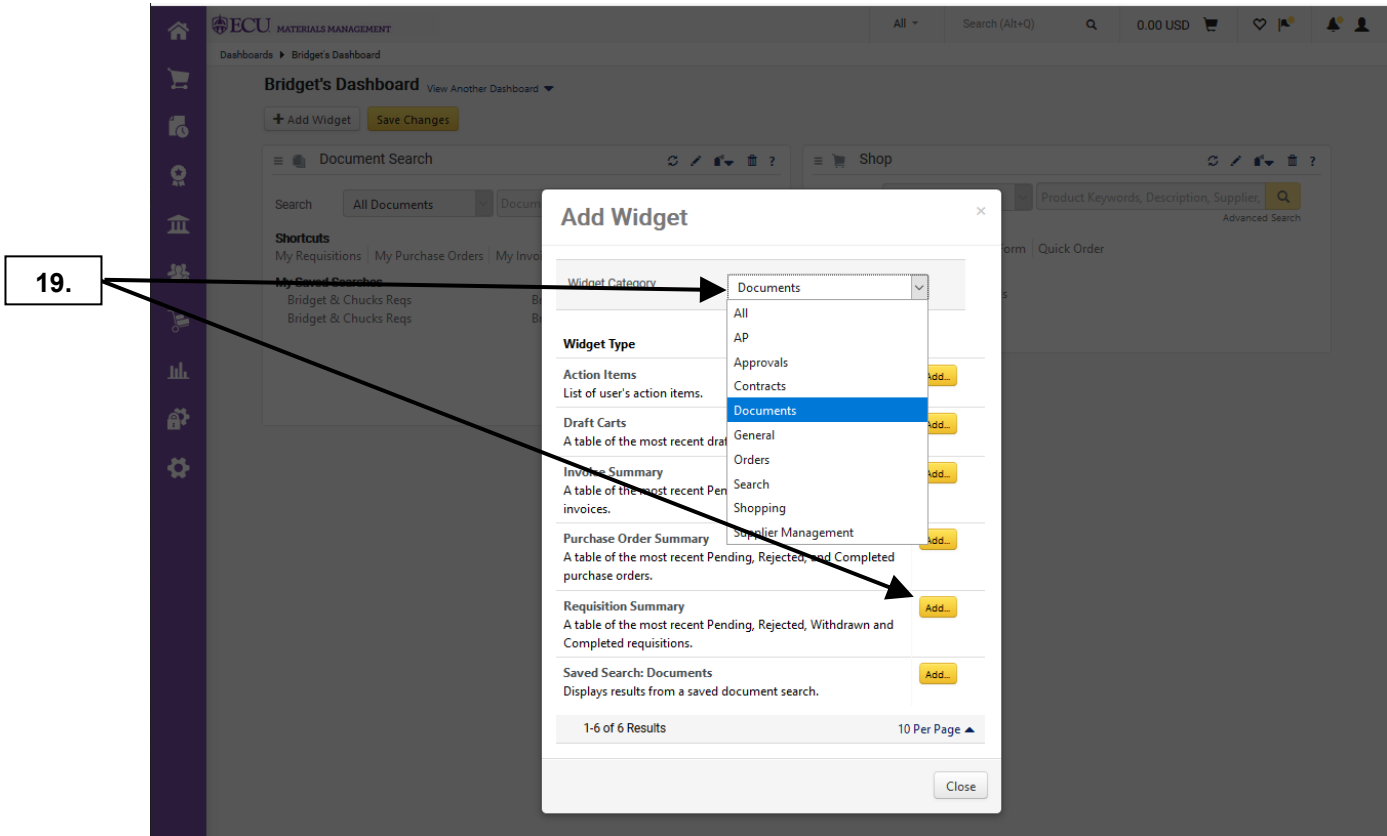
16. Click **Save Changes** button.

CREATING PERSONAL DASHBOARD

Last Updated on: 5/19/2021



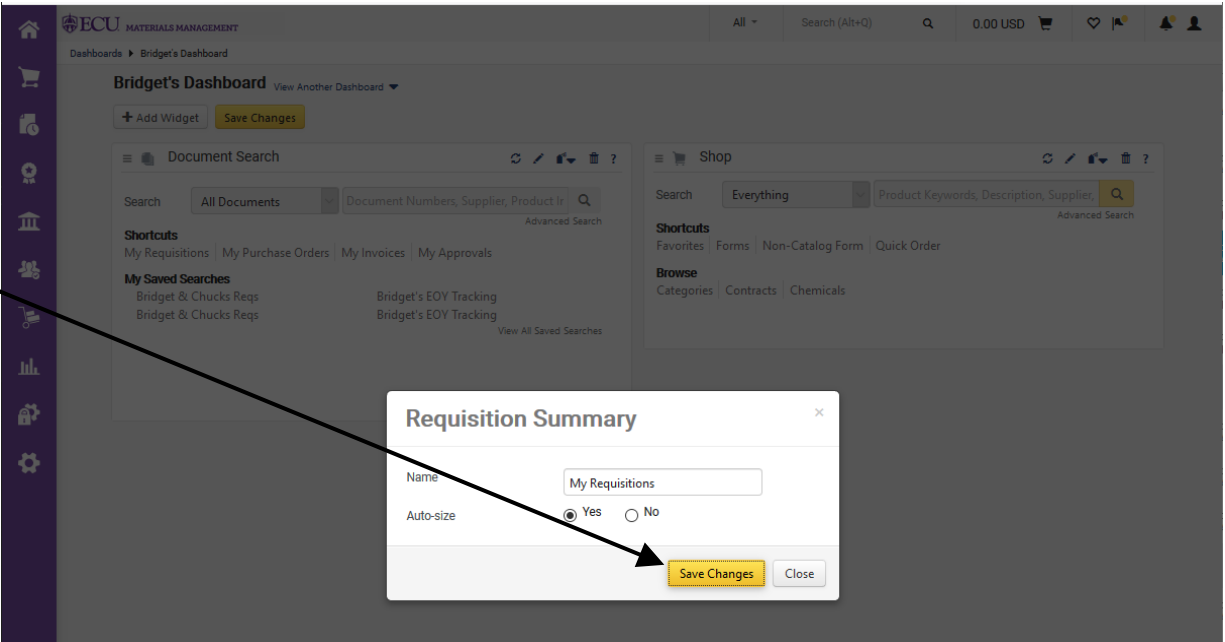
- 17. Note new widget has been added to dashboard.
- 18. Click on **Add Widget** button.



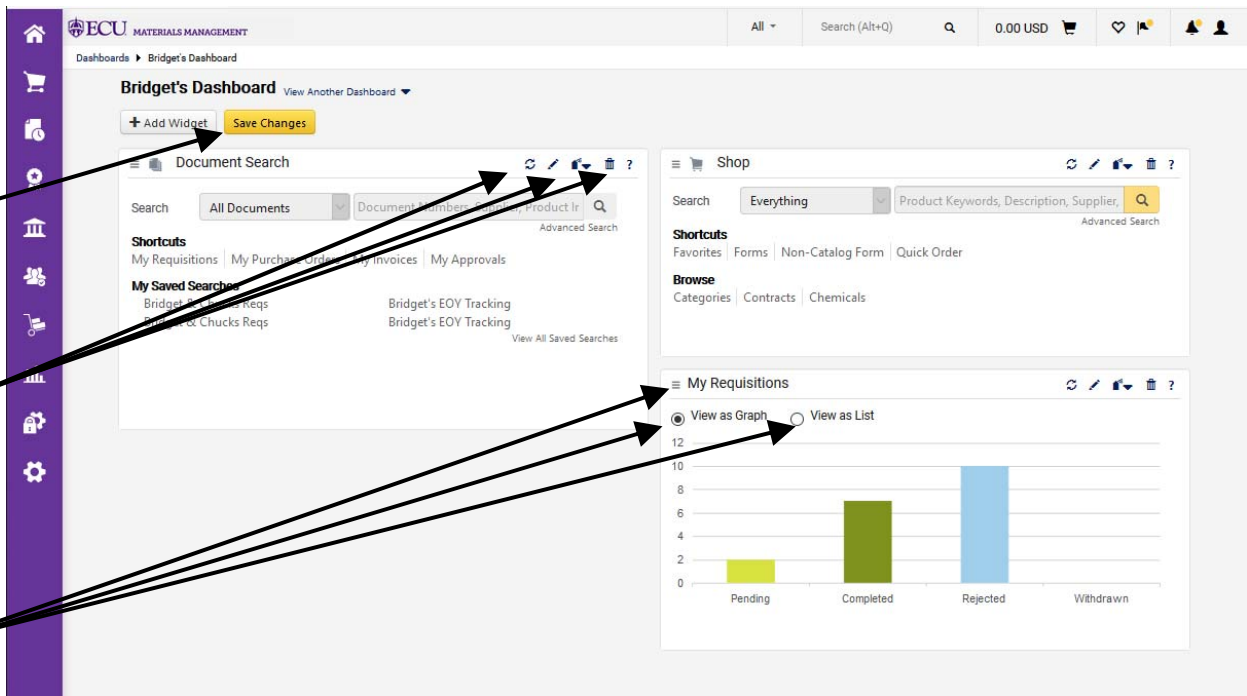
- 19. After selecting desired **Widget Category**, select another **Widget Type** and click the **Add...** button. For this example, we will use the Documents **Widget Category** and select the **Requisition Summary** widget.

CREATING PERSONAL DASHBOARD

Last Updated on: 5/19/2021



20. Click **Save Changes** button.



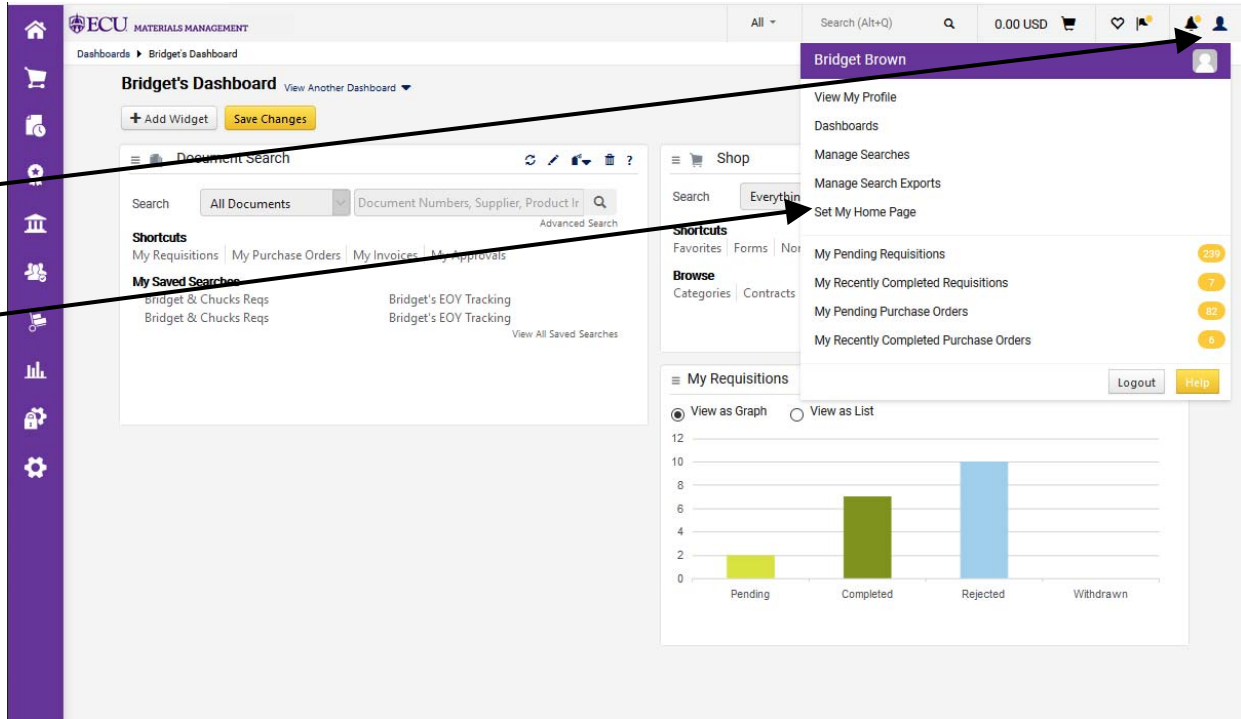
21. Note new widget has been added to dashboard. You can view **My Requisitions Orders** in graph or list form.

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

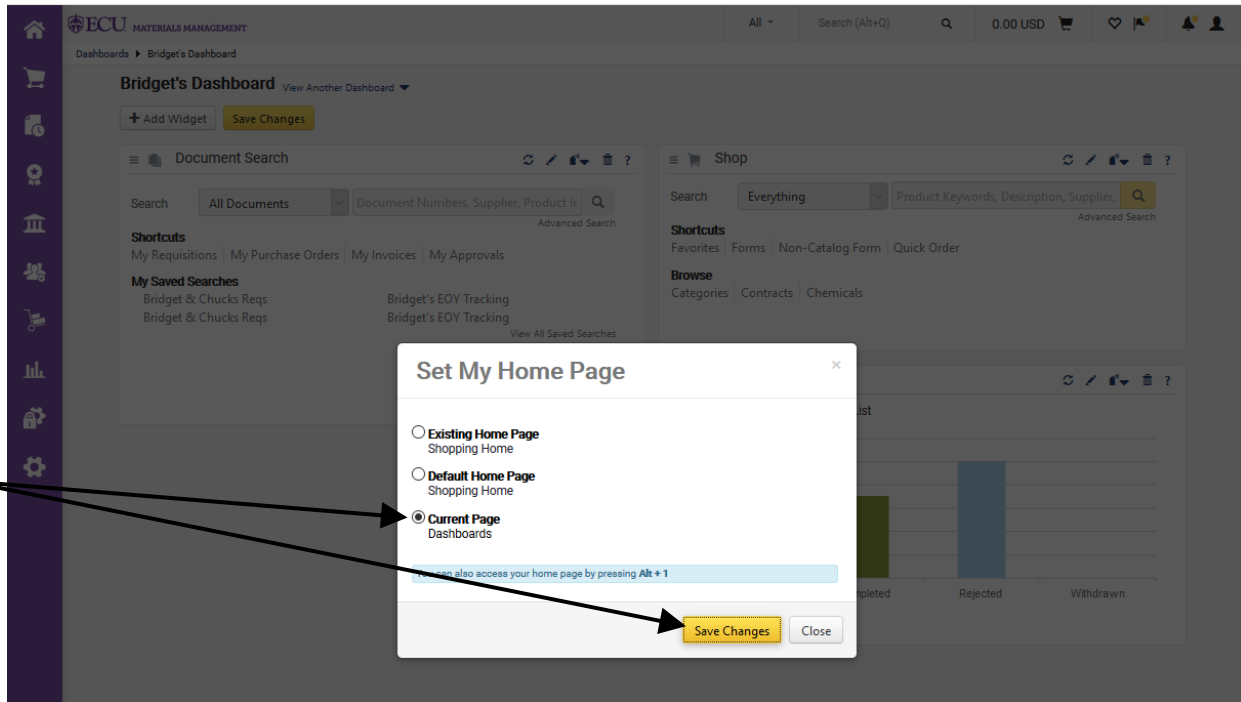
Last Updated on: 5/19/2021



24.

25.

- 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.

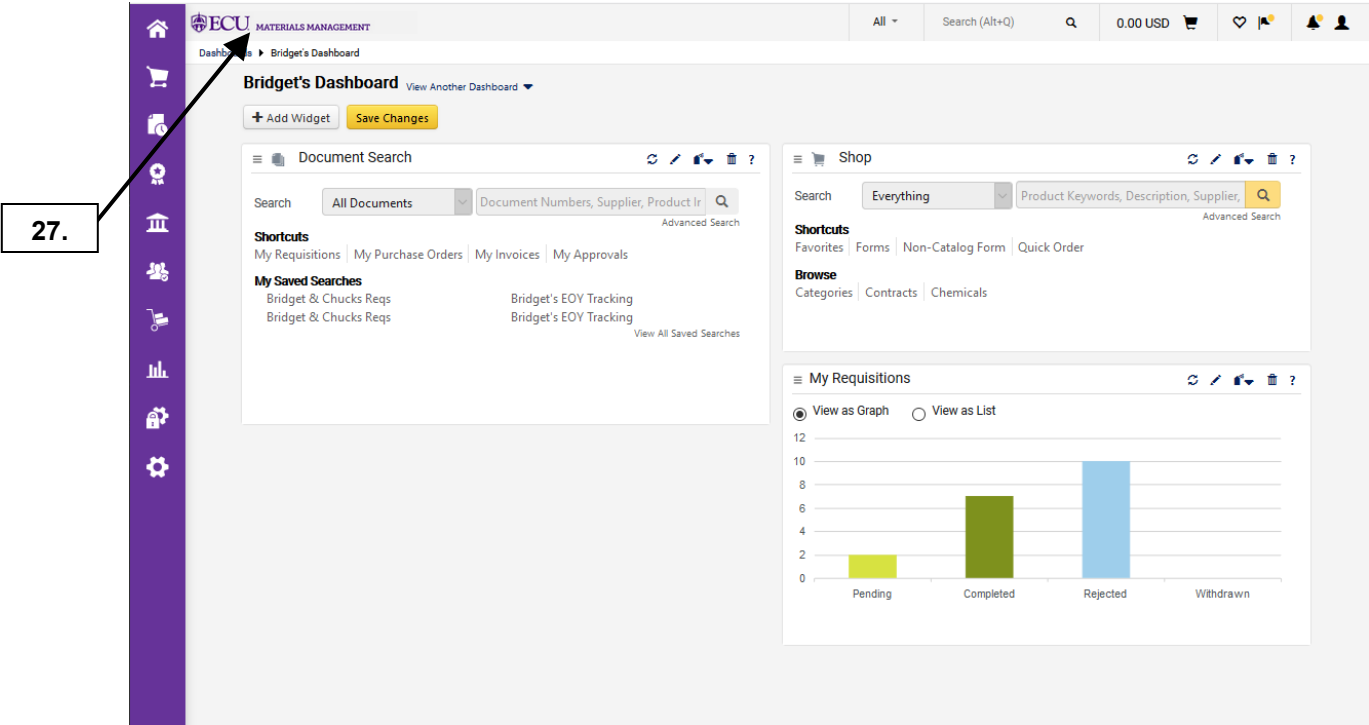


26.

- 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

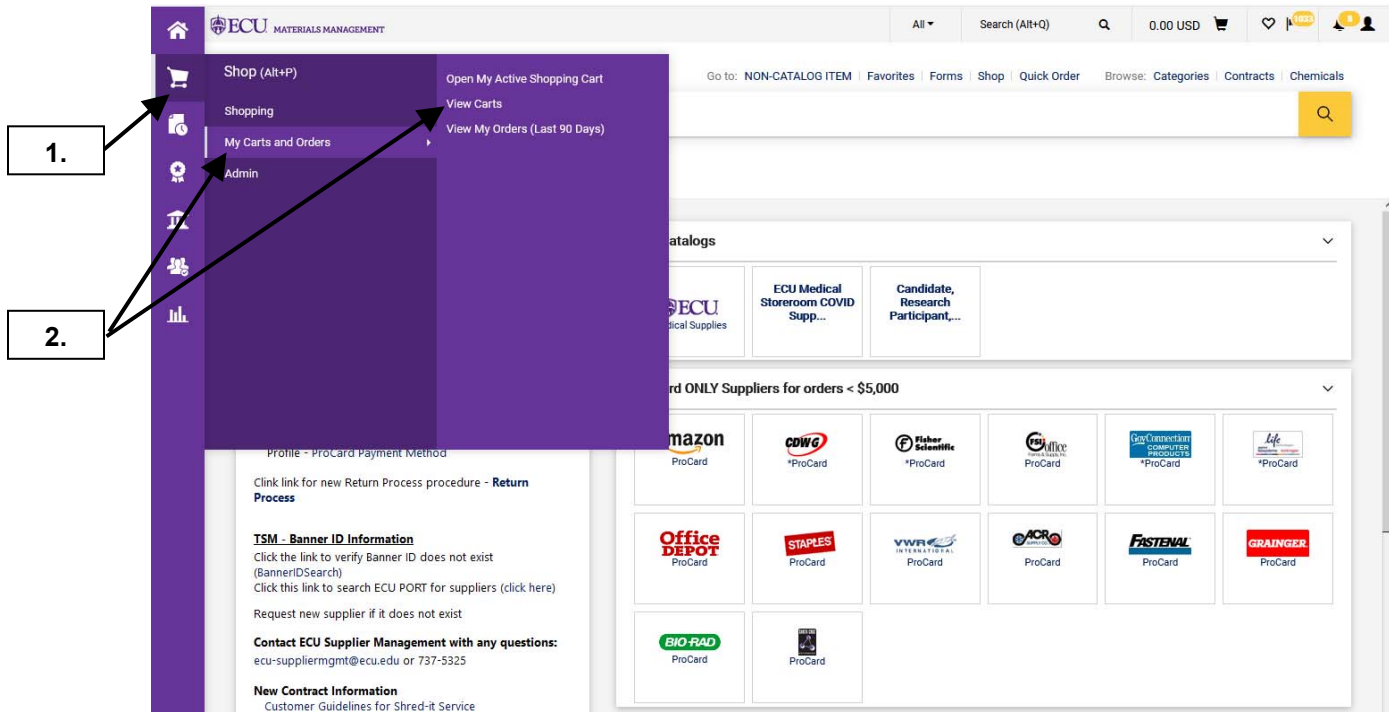
Last Updated on: 5/19/2021



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

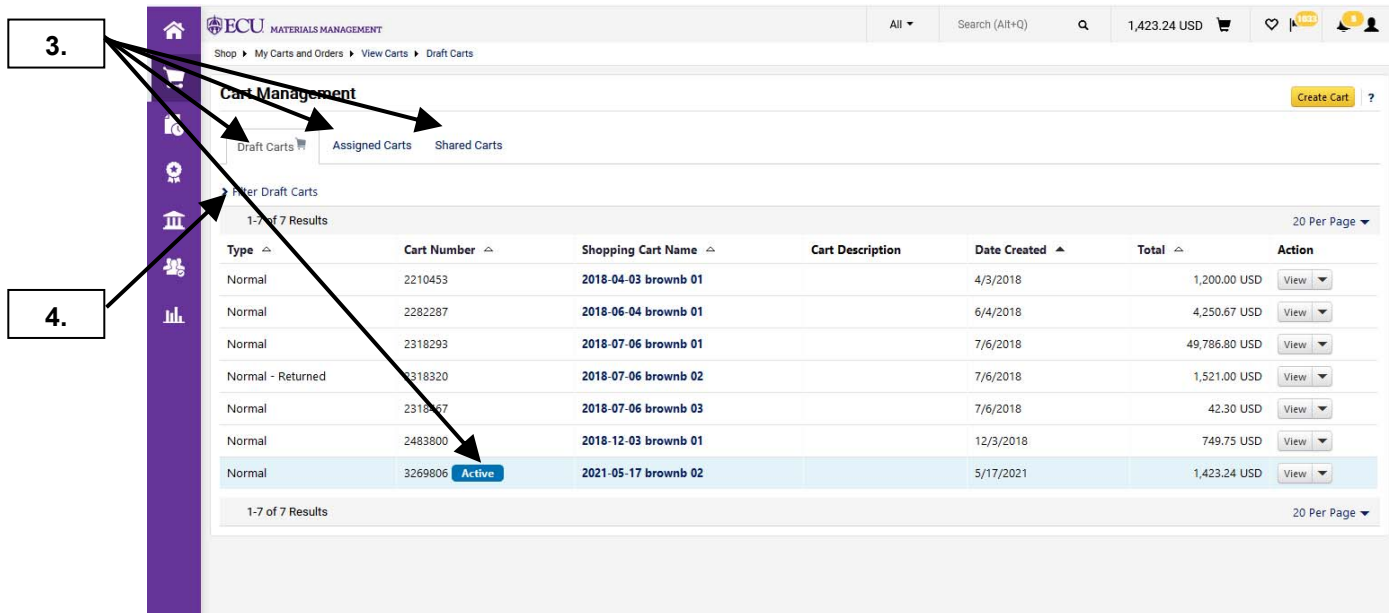
SHOPPING CART MANAGEMENT

Last Updated on: 5/19/2021



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**. **Note:** The **Assigned Carts** tab is for carts that have been assigned to you by PORT Shoppers within your department if utilized. The **Shared Carts** is a feature where department Requisitioners can share a cart to complete an order. Email PORT@ecu.edu if you would like to learn more about assigned cart or shared cart features.
4. To filter carts within a tab, click on **Filter Draft Carts**.

SHOPPING CART MANAGEMENT

Last Updated on: 5/19/2021

The screenshot shows the 'Cart Management' page with the 'Draft Carts' tab selected. The filter section includes fields for 'Cart Name', 'Cart Number', 'Date Created', 'Cart Type', and 'Cart Status'. The 'Cart Status' dropdown is currently set to 'All'. Below the filters is a table with 7 results. The table columns are: Type, Cart Number, Shopping Cart Name, Cart Description, Date Created, Total, and Action. The last row is highlighted in blue and has an 'Active' status.

Type	Cart Number	Shopping Cart Name	Cart Description	Date Created	Total	Action
Normal	2210453	2018-04-03 brownb 01		4/3/2018	1,200.00 USD	View
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	2483800	2018-12-03 brownb 01		12/3/2018	749.75 USD	View
Normal	3269806	2021-05-17 brownb 02		5/17/2021	1,423.24 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 Management' page with the 'Draft Carts' tab selected. The 'Cart Status' dropdown menu is open, showing options: 'All', 'Not Returned', 'Approver Returned', and 'Assignee Returned'. The 'Not Returned' option is highlighted. Below the filters is the same table as in the previous screenshot, with 7 results. The last row is highlighted in blue and has an 'Active' status.

Type	Cart Number	Shopping Cart Name	Cart Description	Date Created	Total	Action
Normal	2210453	2018-04-03 brownb 01		4/3/2018	1,200.00 USD	View
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	2483800	2018-12-03 brownb 01		12/3/2018	749.75 USD	View
Normal	3269806	2021-05-17 brownb 02		5/17/2021	1,423.24 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

Last Updated on: 5/19/2021

ECU MATERIALS MANAGEMENT

Shop My Carts and Orders View Carts Draft Carts

Cart Management

Create Cart ?

Draft Carts Assigned Carts Shared Carts

Filter Draft Carts

Cart Name Cart Type All

Cart Number Cart Status Not Returned

Date Created mm/dd/yyyy

Clear Filter

1-6 of 6 Results 20 Per Page

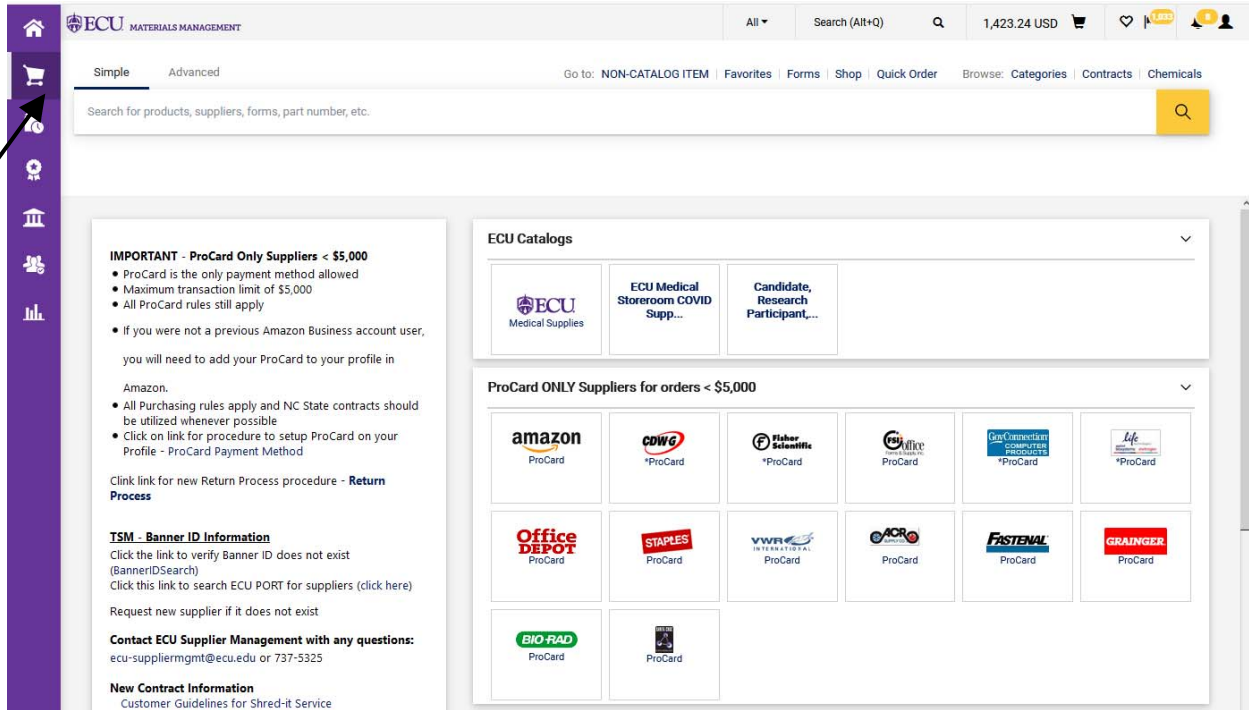
Type	Cart Number	Shopping Cart Name	Cart Description	Date Created	Total	Action
Normal	2210453	2018-04-03 brownb 01		4/3/2018	1,200.00 USD	View
Normal	2282287	2018-06-04 brownb 01		6/4/2018	4,250.67 USD	View
Normal	2318293	2018-07-06 brownb 01		7/6/2018	49,786.80 USD	View
Normal	2318467	2018-07-06 brownb 03		7/6/2018	42.30 USD	View
Normal	2483800	2018-12-03 brownb 01		12/3/2018	749.75 USD	View
Normal	3269806	2021-05-17 brownb 02		5/17/2021	1,423.24 USD	View

1-6 of 6 Results 20 Per Page

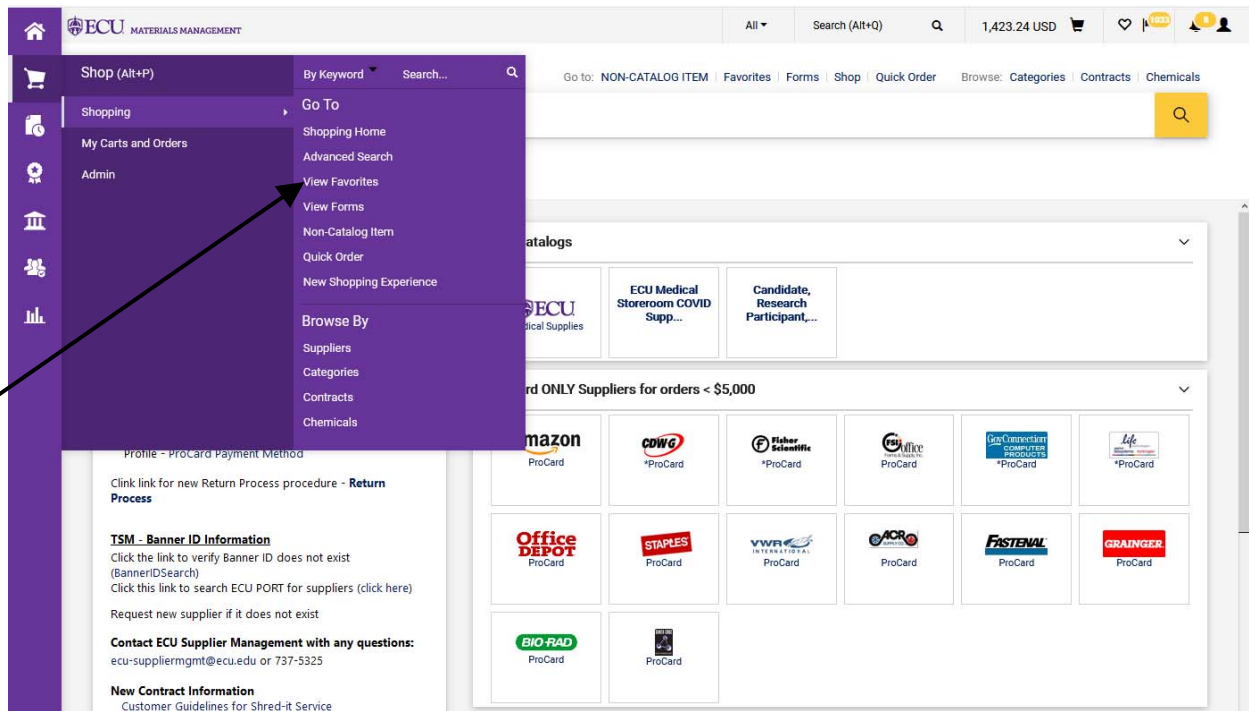
- 9. Note that **Returned** cart is no longer visible due to **Not Returned** for **Cart Status** filter.
- 10. This completes the steps for using this procedure. Click on **ECU** icon to return to home page.

CREATE MY FAVORITE FOLDERS

Last Updated on: 5/19/2021



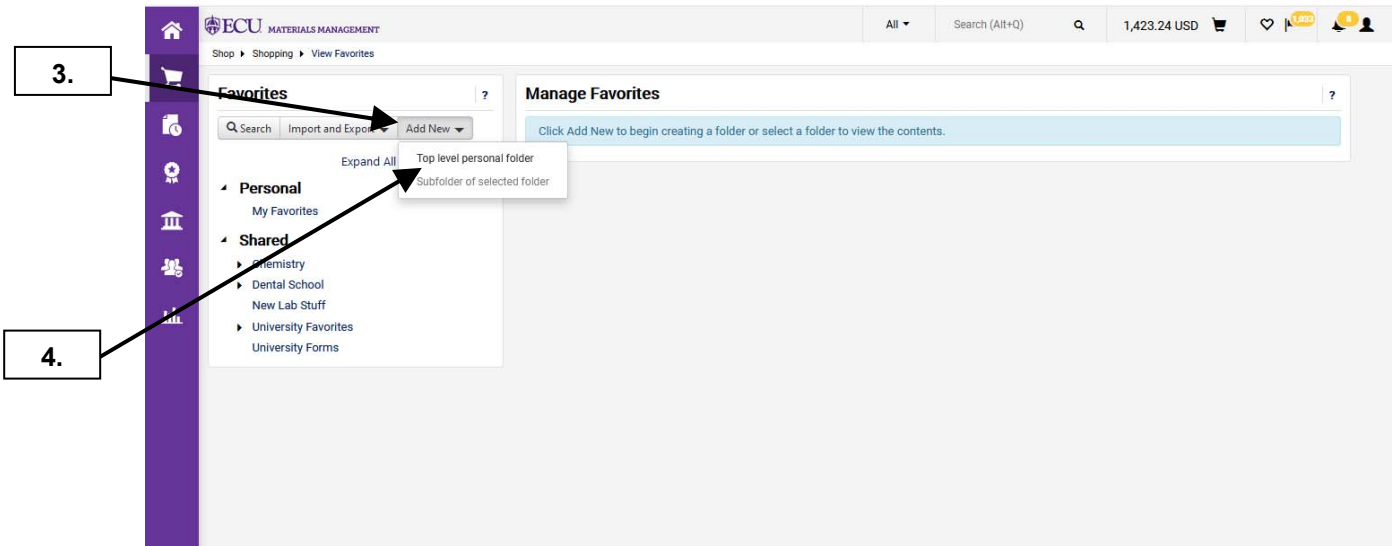
1. Click on **Shopping Cart** icon.



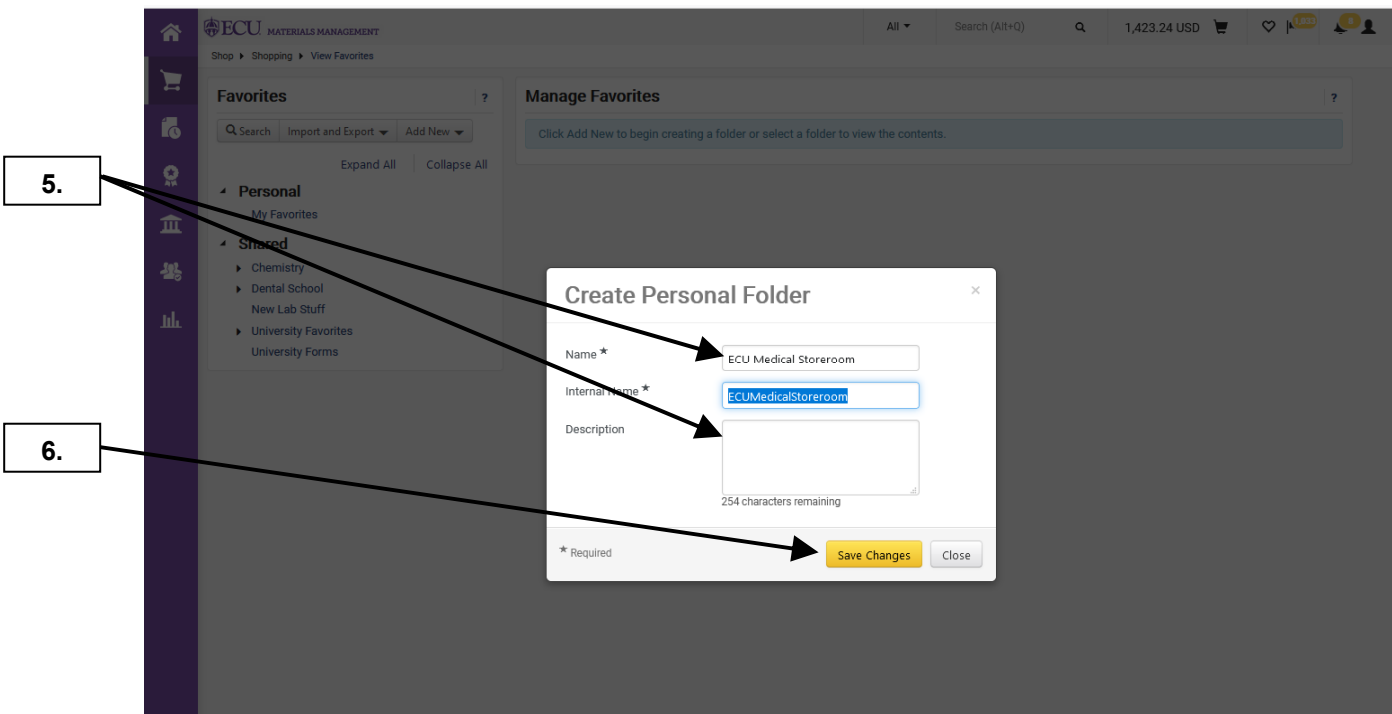
2. Click on **View Favorites** link.

CREATE MY FAVORITE FOLDERS

Last Updated on: 5/19/2021



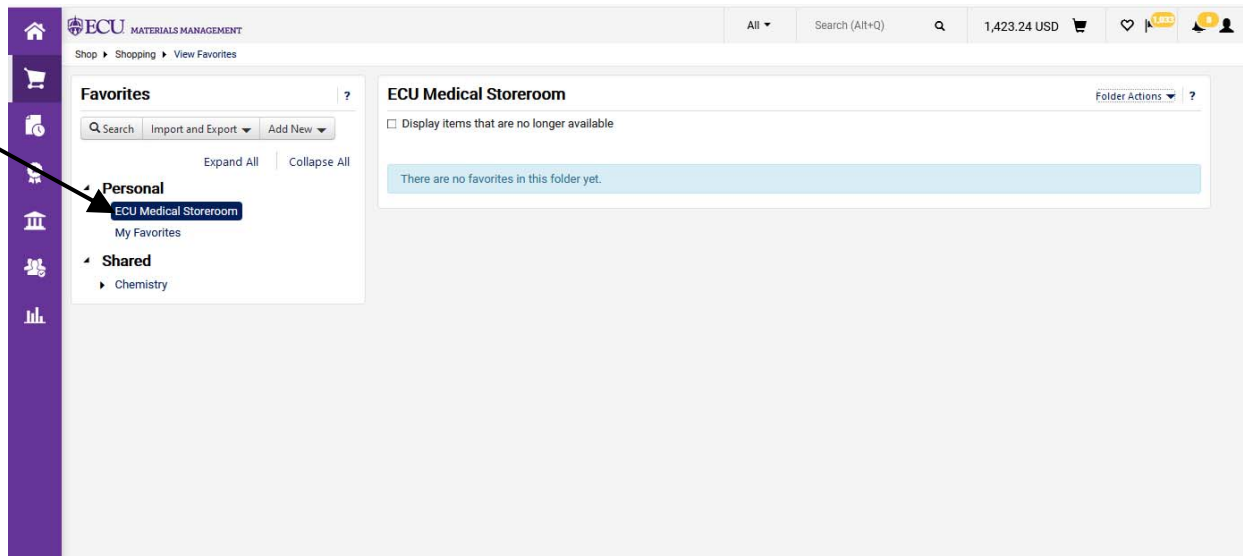
3. Click on **Add New** button.
4. Select **Top level personal folder** to create a folder on the same level as **My Favorites**. **Note:** If you select **Sub folder of selected folder**, the folder will be within **My Favorites**.



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

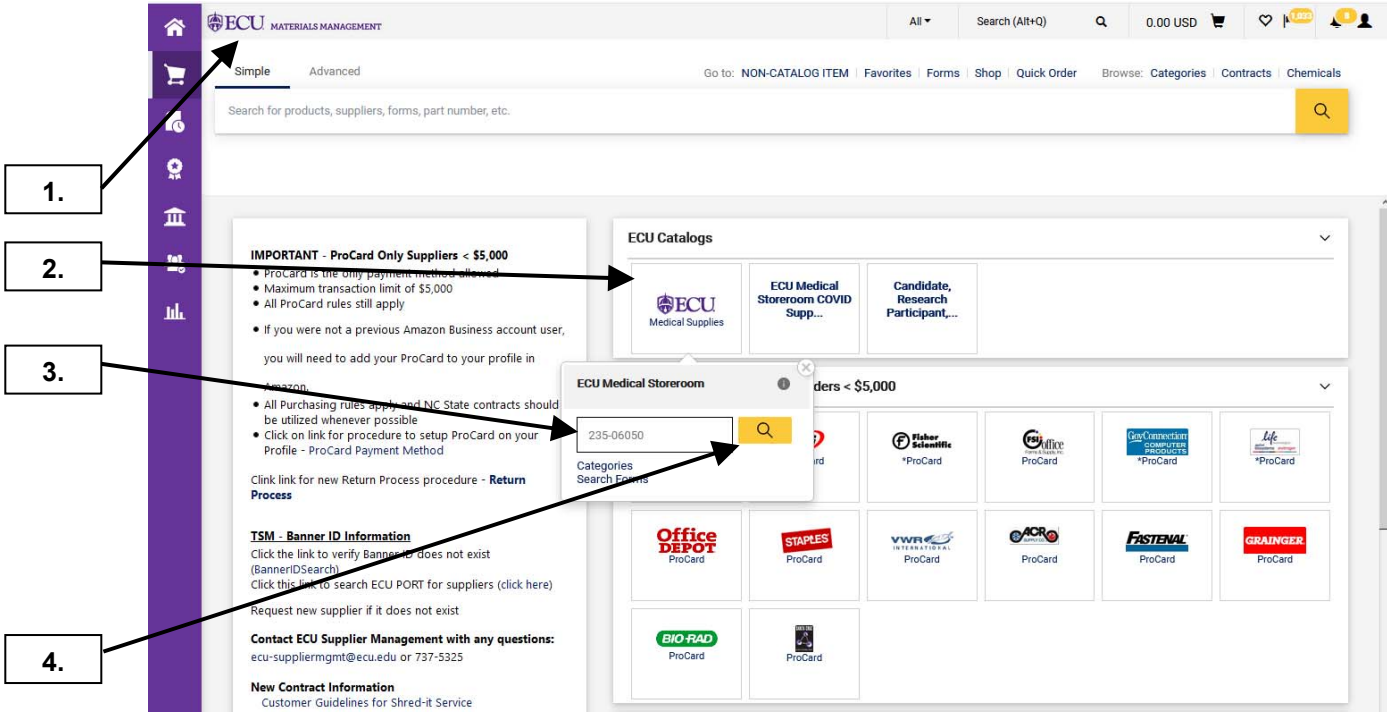
Last Updated on: 5/19/2021



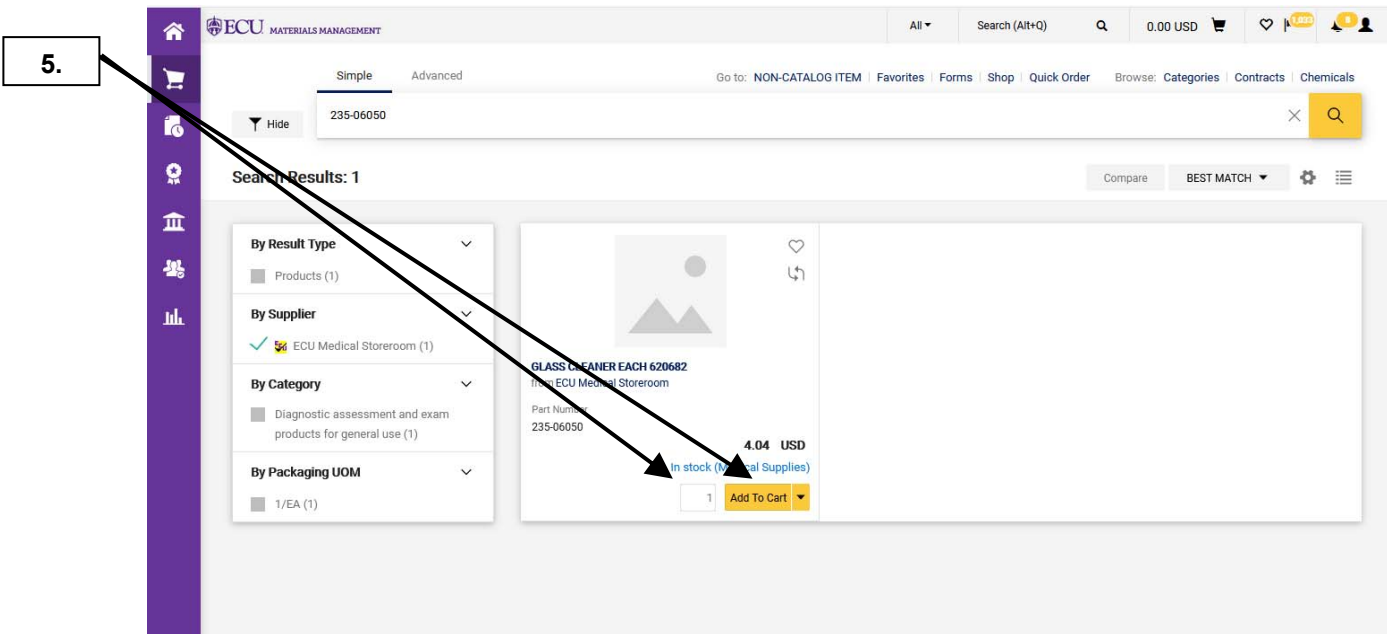
7. Notice that you now have a folder for ECU Medical Supplies storeroom. This completes the steps for creating my favorite folders. See the **Create My Favorite Items** procedure to continue with favorites.

CREATE MY FAVORITE ITEMS

Last Updated on: 5/19/2021



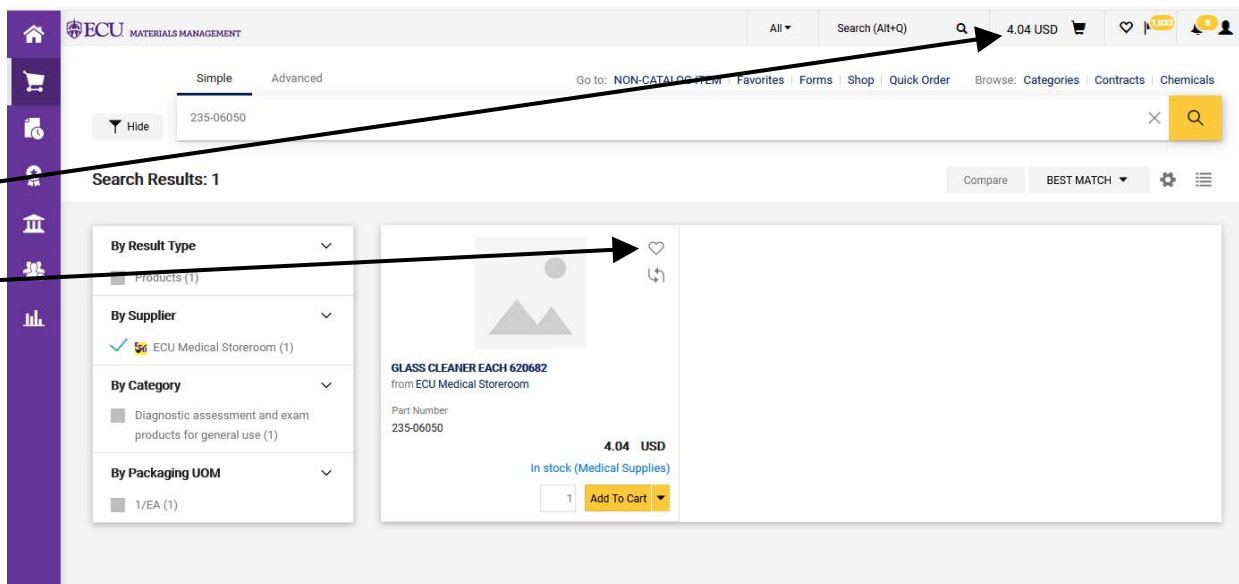
1. Ensure that you are on the **home/shop** page.
2. Click on the East Carolina University Medical Supplies icon.
3. Enter **Catalog #** for one of Medical Storeroom room items. **Note:** This procedure will demonstrate the methods for adding items to your **Favorites** from hosted catalog searches and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



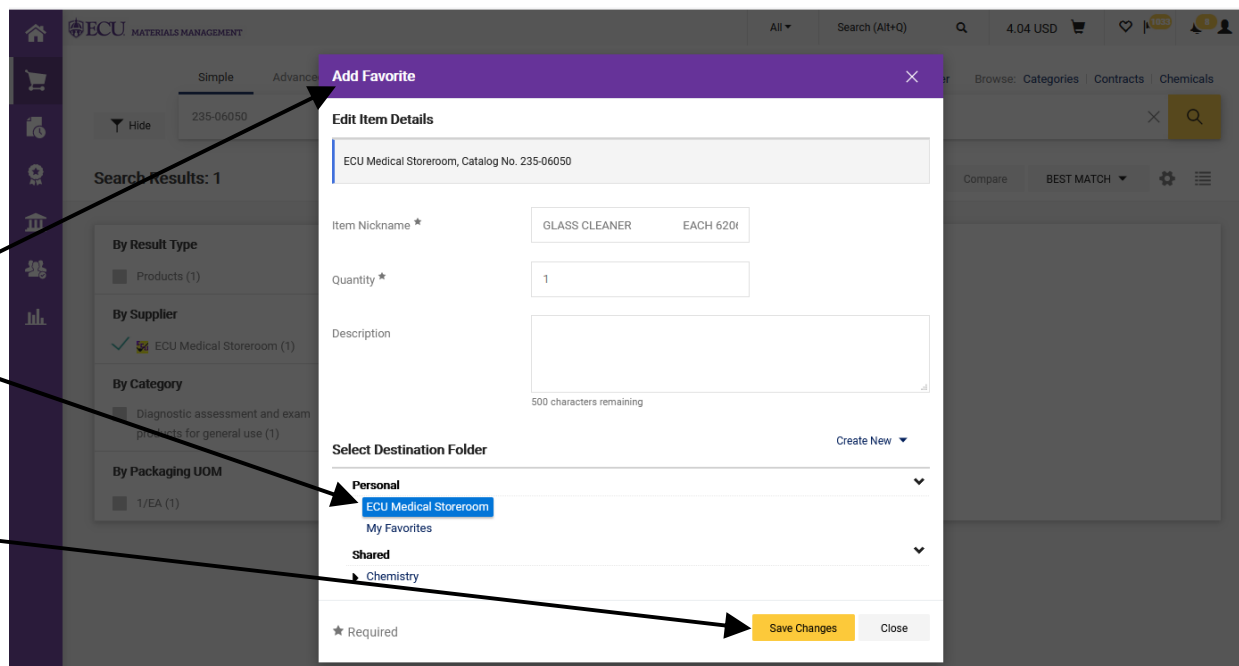
5. Enter quantity needed and click on **Add to Cart** button.

CREATE MY FAVORITE ITEMS

Last Updated on: 5/19/2021



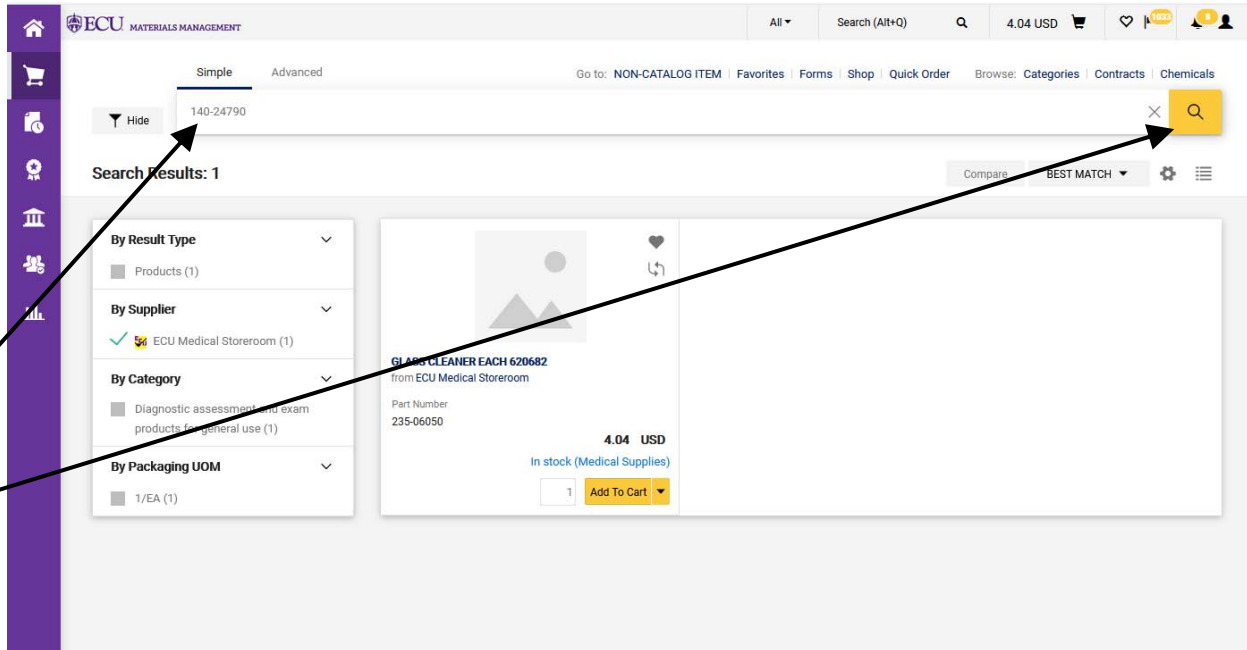
6. Notice that your shopping cart has been updated with the items that were just added.
7. Click on **add favorite** heart icon.



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 suppliers.
10. Click on the **Save Changes** button. **Note:** This completes the 1st method of adding an item to favorites from hosted catalog searches.

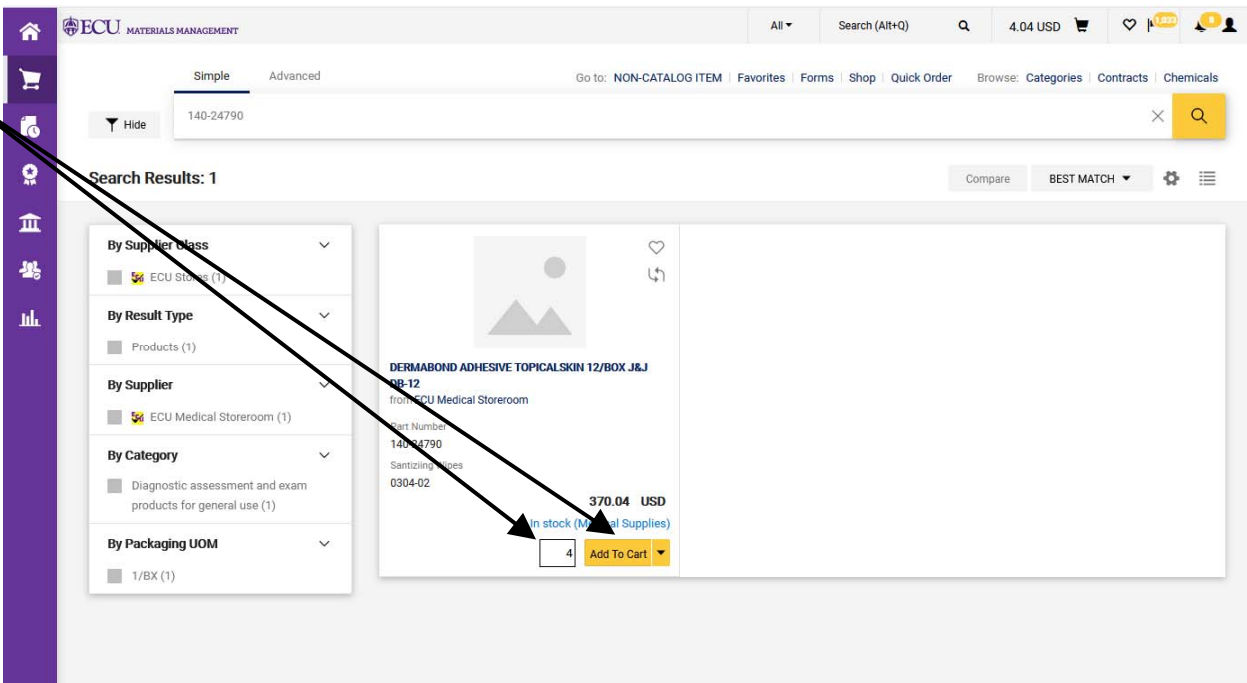
CREATE MY FAVORITE ITEMS

Last Updated on: 5/19/2021



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

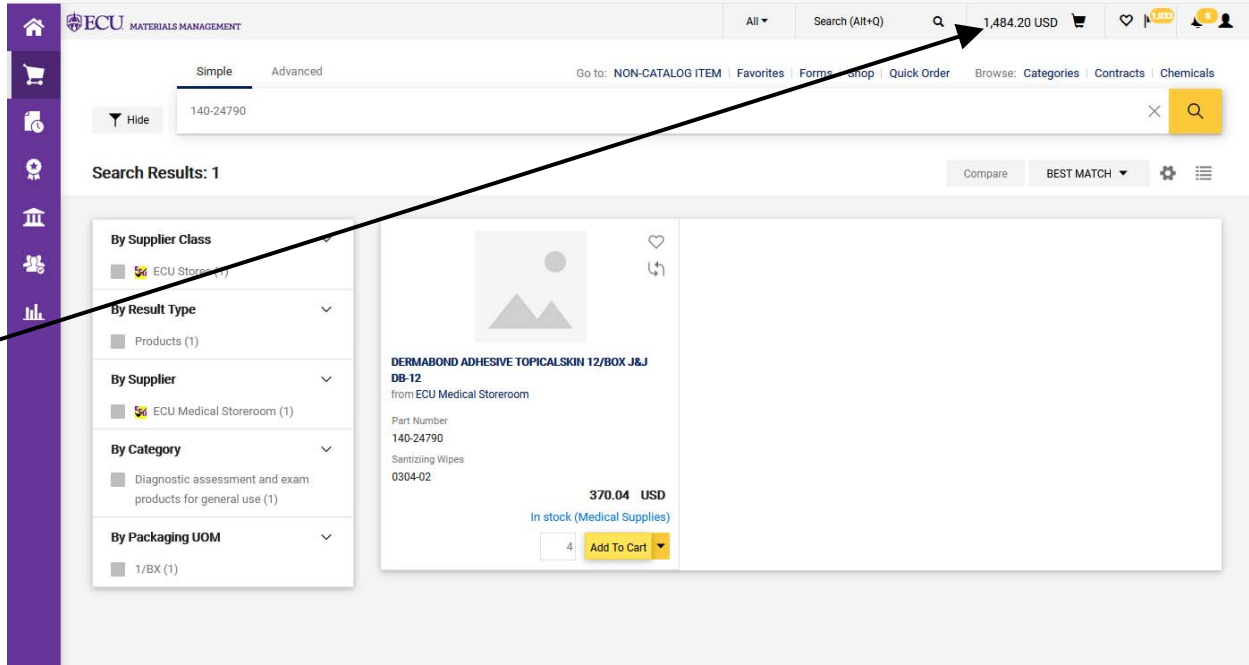
12. Click on the **Search** button.



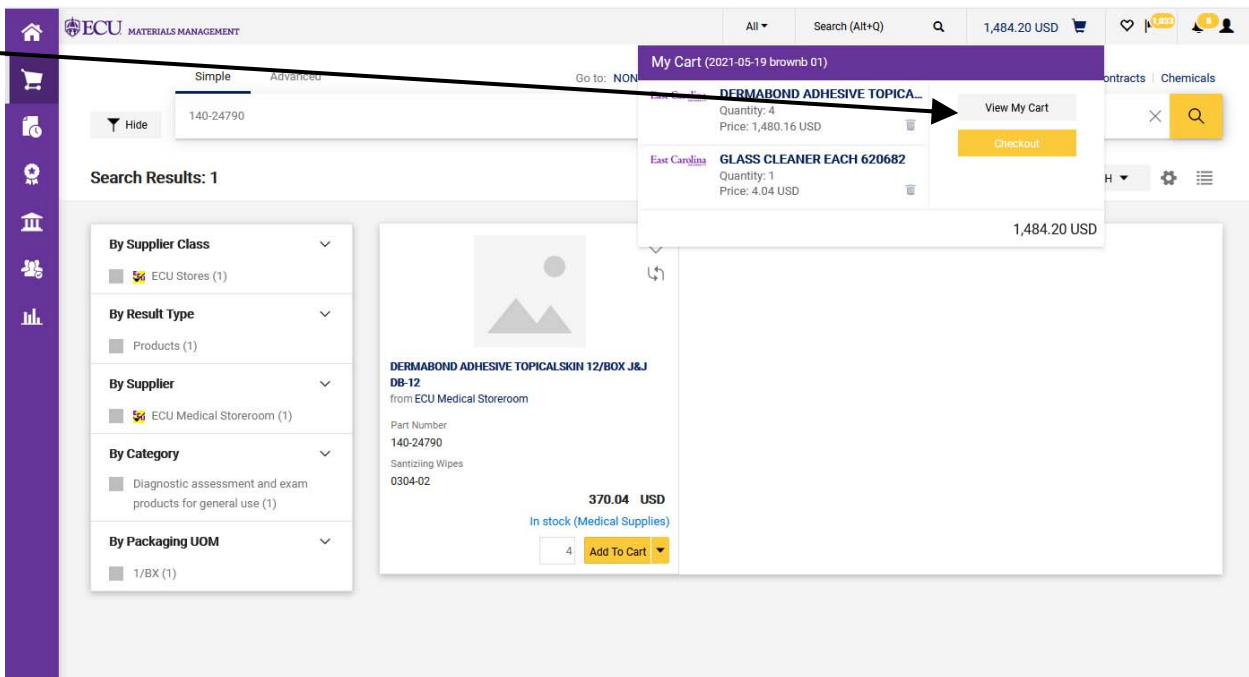
13. Enter quantity needed and click on **Add to Cart** button.

CREATE MY FAVORITE ITEMS

Last Updated on: 5/19/2021



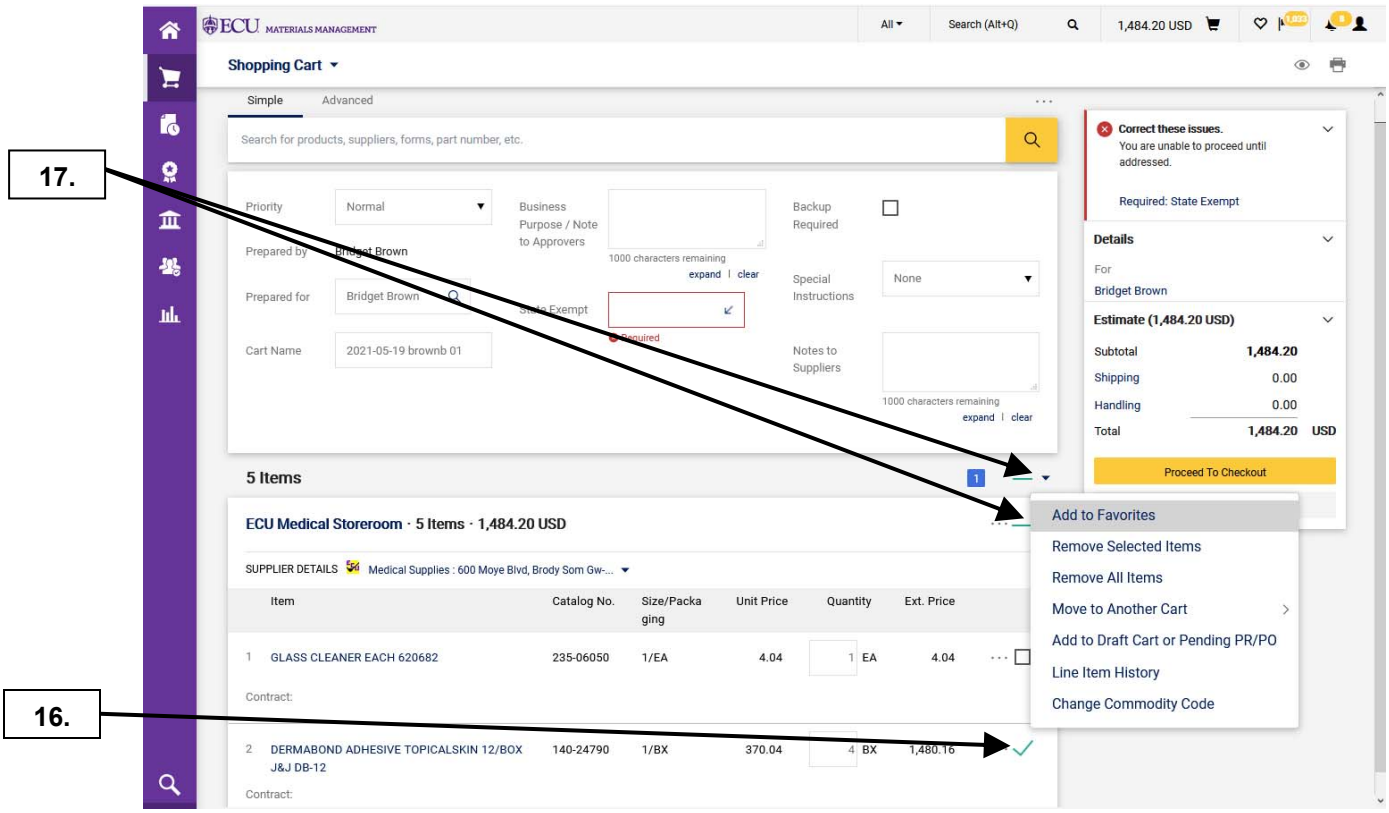
14. Notice that your shopping cart has been updated with the items that were just added.



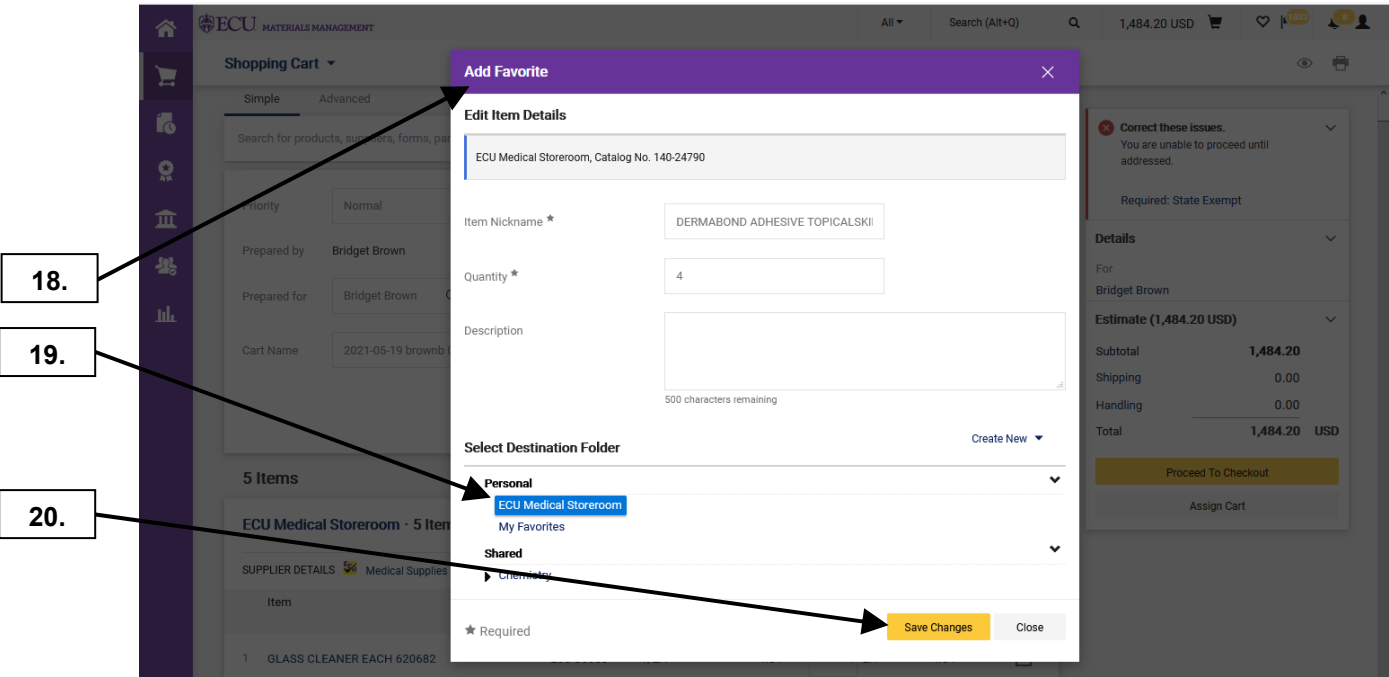
15. Click on **View My Cart**.

CREATE MY FAVORITE ITEMS

Last Updated on: 5/19/2021



- 16. Click on the check box to select the 2nd item.
- 17. Click the drop-down box to see the available actions from the menu and select **Add to Favorites** option.



- 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: 5/19/2021

The screenshot displays the 'Shopping Cart' interface in the ECU Materials Management system. The top navigation bar includes the ECU logo, 'MATERIALS MANAGEMENT', and a search bar. The main content area is divided into a form for adding items and a table of the current cart items. A sidebar on the right provides a summary of the cart and a warning about a required state exempt status.

Shopping Cart Form Fields:

- Priority: Normal
- Business Purpose / Note to Approvers: [Empty]
- Backup Required:
- Prepared by: Bridget Brown
- State Exempt: [Empty] (Required)
- Special Instructions: None
- Prepared for: Bridget Brown
- Notes to Suppliers: [Empty]
- Cart Name: 2021-05-19 brownb 01

5 Items

ECU Medical Storeroom - 5 Items - 1,484.20 USD

SUPPLIER DETAILS: Medical Supplies : 600 Moye Blvd, Brody Som Gw...

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1 GLASS CLEANER EACH 620682	235-06050	1/EA	4.04	1 EA	4.04	...
Contract:						
2 DERMABOND ADHESIVE TOPICALSKIN 12/BOX J&J DB-12	140-24790	1/BX	370.04	4 BX	1,480.16	...
Contract:						

Summary and Warnings:

- Correct these issues:** You are unable to proceed until addressed. Required: State Exempt
- Details:** For Bridget Brown
- Estimate (1,484.20 USD):**
 - Subtotal: 1,484.20
 - Shipping: 0.00
 - Handling: 0.00
 - Total: 1,484.20 USD

Buttons: Proceed To Checkout, Assign Cart

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: 5/19/2021

The screenshot shows the ECU Materials Management website interface. On the left sidebar, the shopping cart icon is highlighted with a black arrow pointing to a box labeled '1.'. The main content area displays 'IMPORTANT - ProCard Only Suppliers < \$5,000' with a list of rules, 'ECU Catalogs' with three items, and 'ProCard ONLY Suppliers for orders < \$5,000' with a grid of supplier logos including Amazon, Office Depot, Staples, VWR, ACR, Fastenal, Grainger, and Bio-Rad.

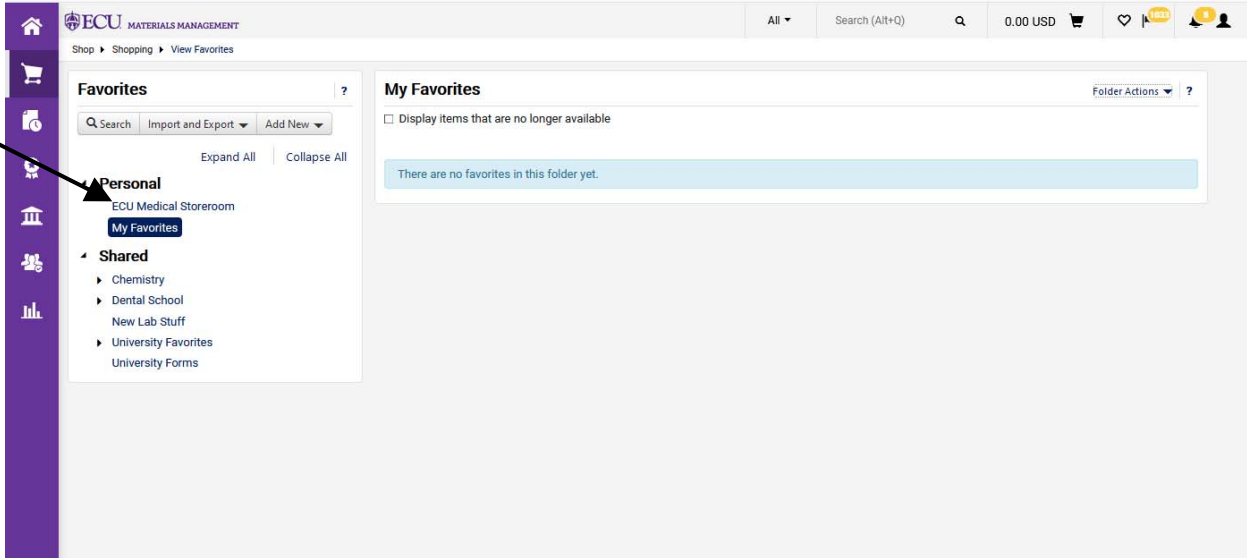
1. Click on **Shopping Cart** icon.

The screenshot shows the ECU Materials Management website with the 'Shop (Alt+P)' dropdown menu open. The 'View Favorites' link is highlighted with a black arrow pointing to a box labeled '2.'. The background content is the same as the previous screenshot.

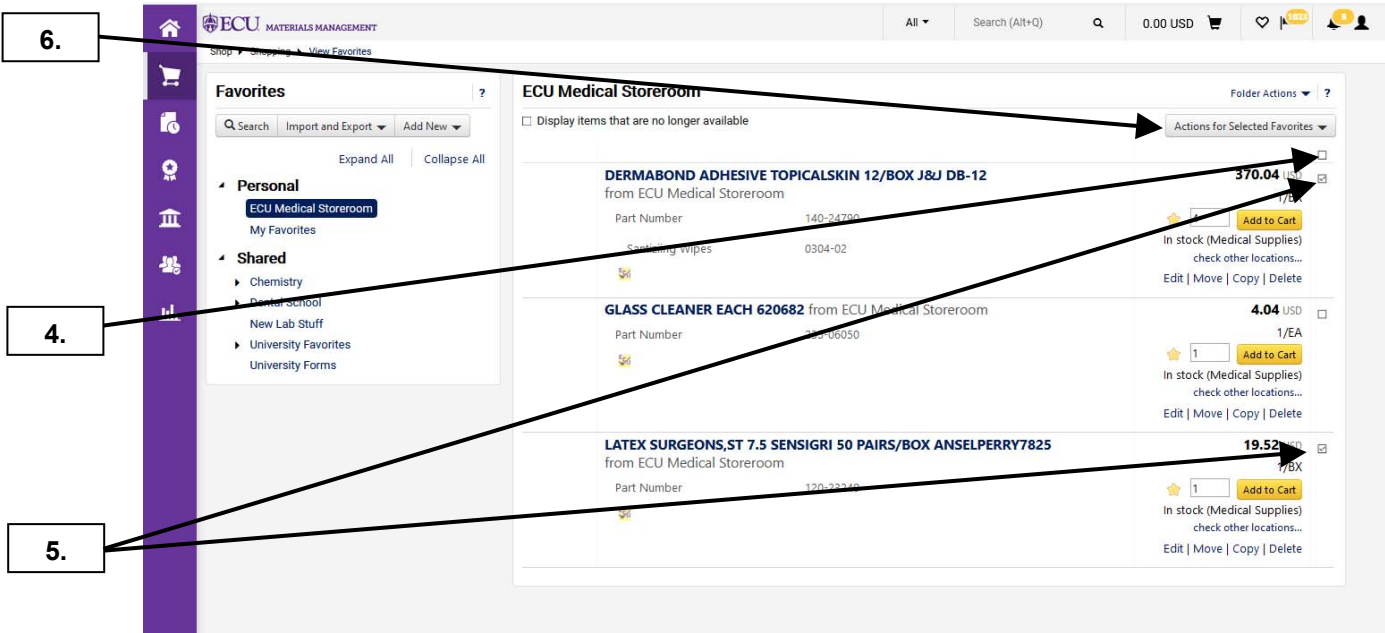
2. Click on **View Favorites** link.

USE MY FAVORITE ITEMS

Last Updated on: 5/19/2021



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: 5/19/2021

ECU MATERIALS MANAGEMENT

Shop > Shopping > View Favorites

0.00 USD

ECU Medical Storeroom

Display items that are no longer available

Actions for Selected Favorites

- Add to Cart
- Edit
- Move
- Copy
- Delete

Edit | Move | Copy | Delete

Item Name	Part Number	Price
DERMABOND ADHESIVE TOPICALSKIN 12/BOX J&J DB-12	140-24790	370.04 USD
GLASS CLEANER EACH 620682	235-06050	4.04 USD
LATEX SURGEONS,ST 7.5 SENSIGRI 50 PAIRS/BOX ANSELPERRY7825	120-23240	19.52 USD

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

ECU MATERIALS MANAGEMENT

Shop > Shopping > View Favorites

1,499.68 USD

ECU Medical Storeroom

Display items that are no longer available

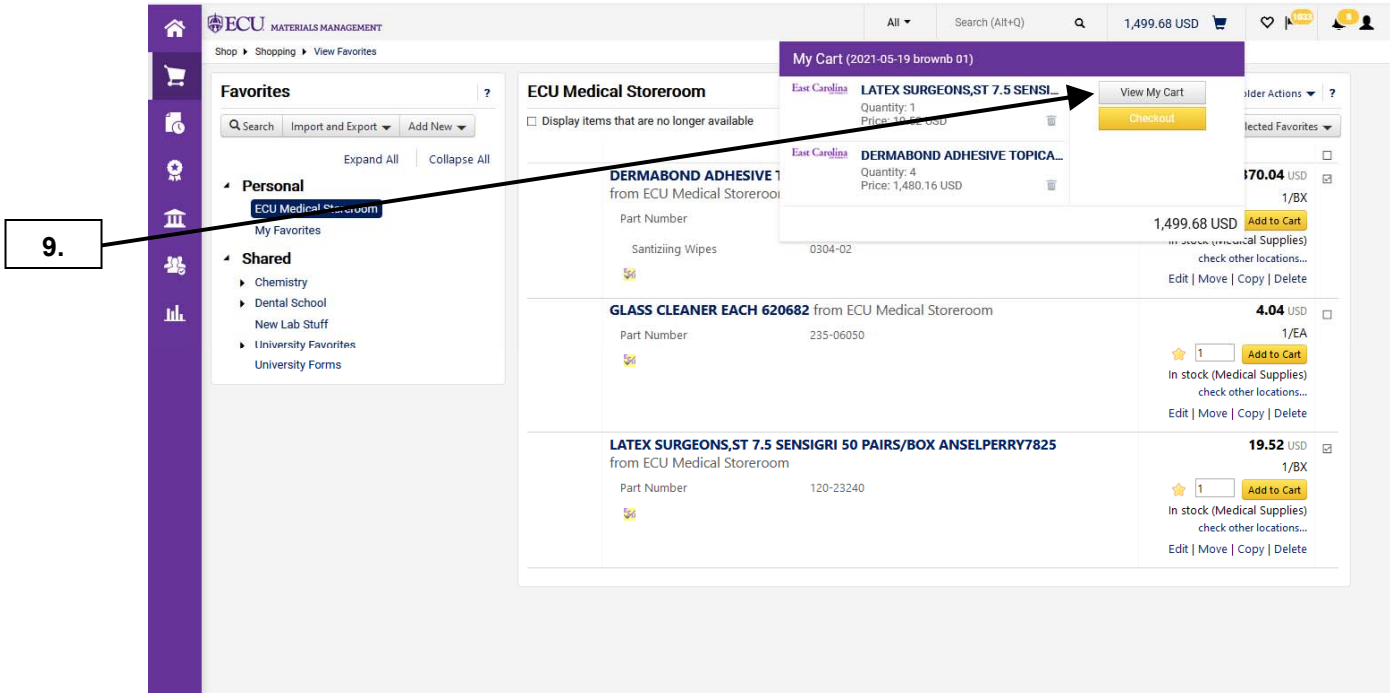
Actions for Selected Favorites

Item Name	Part Number	Price
DERMABOND ADHESIVE TOPICALSKIN 12/BOX J&J DB-12	140-24790	370.04 USD
GLASS CLEANER EACH 620682	235-06050	4.04 USD
LATEX SURGEONS,ST 7.5 SENSIGRI 50 PAIRS/BOX ANSELPERRY7825	120-23240	19.52 USD

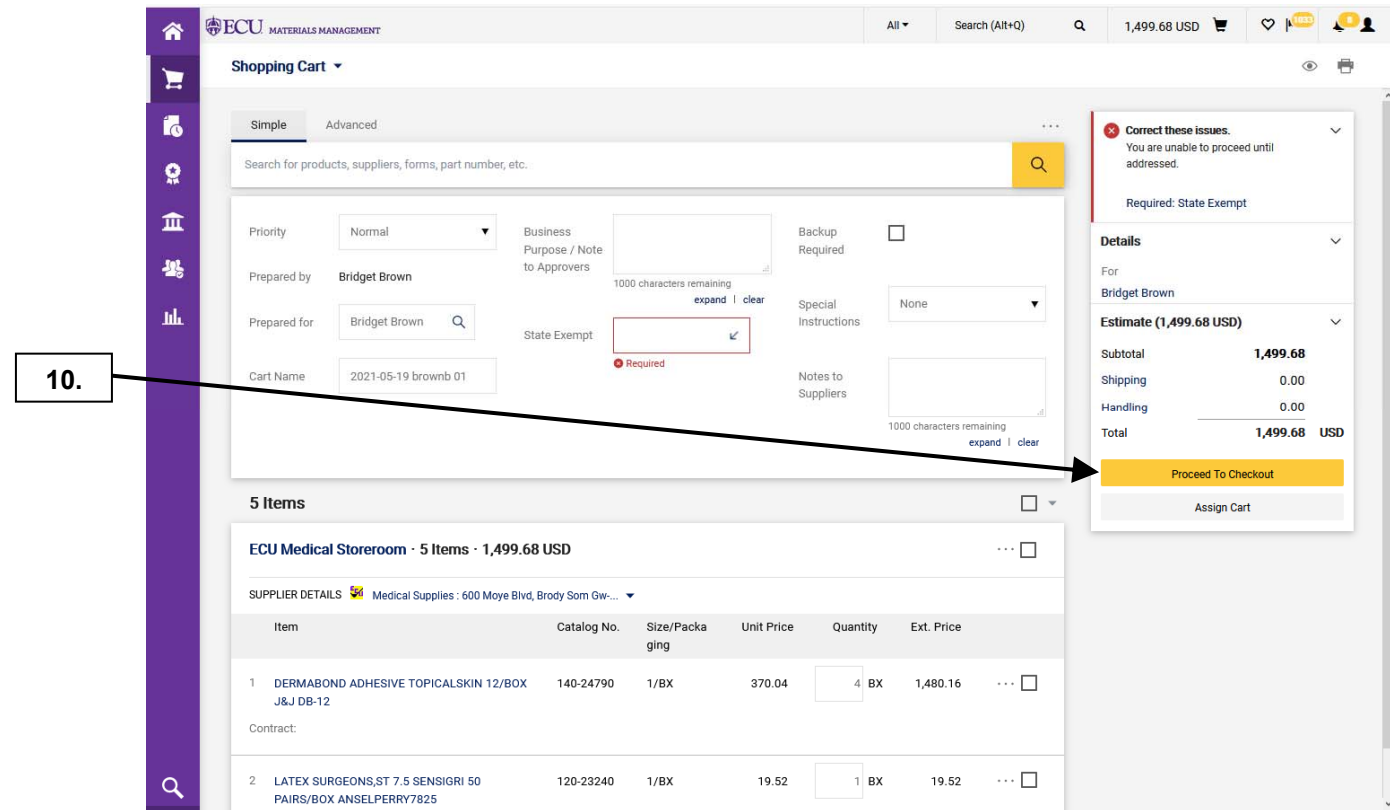
8. Notice the items were added to the shopping cart. Click on **Shopping Cart**.

USE MY FAVORITE ITEMS

Last Updated on: 5/19/2021



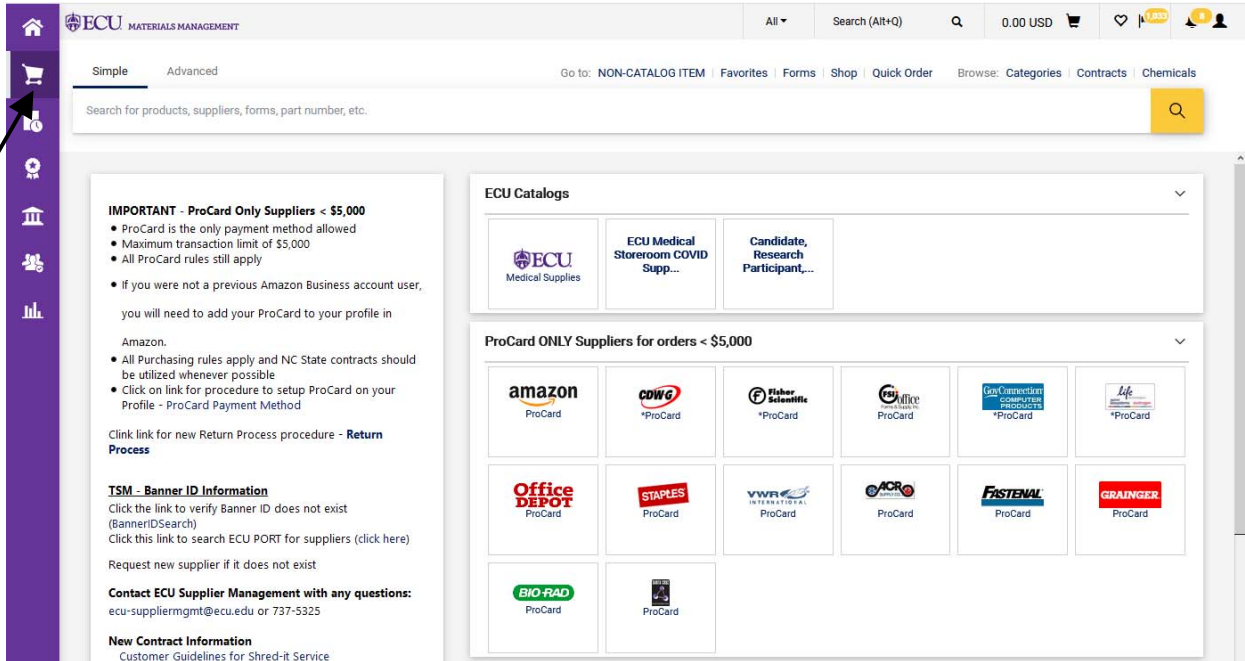
9. Click on **View My Cart**.



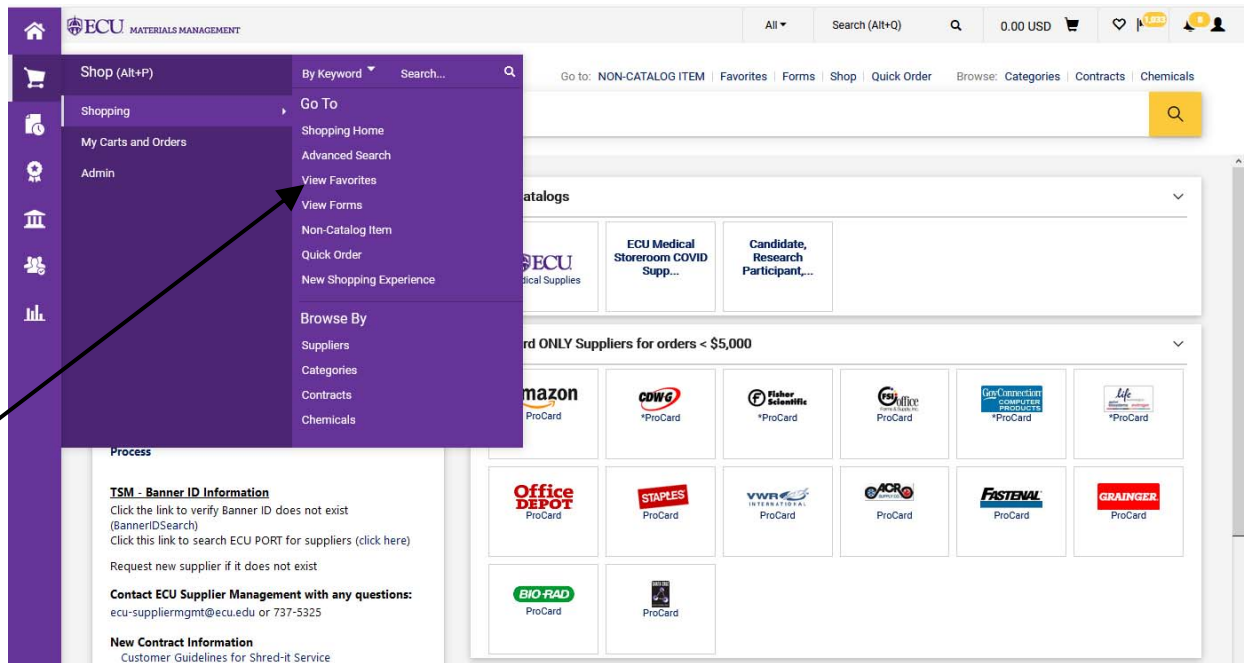
10. This completes the steps for using my favorites and brings you to the **New Shopping Cart** edit section. See the **Edit Cart Header** procedure to continue the review process.

USE UNIVERSITY FAVORITE ITEMS

Last Updated on: 5/19/2021



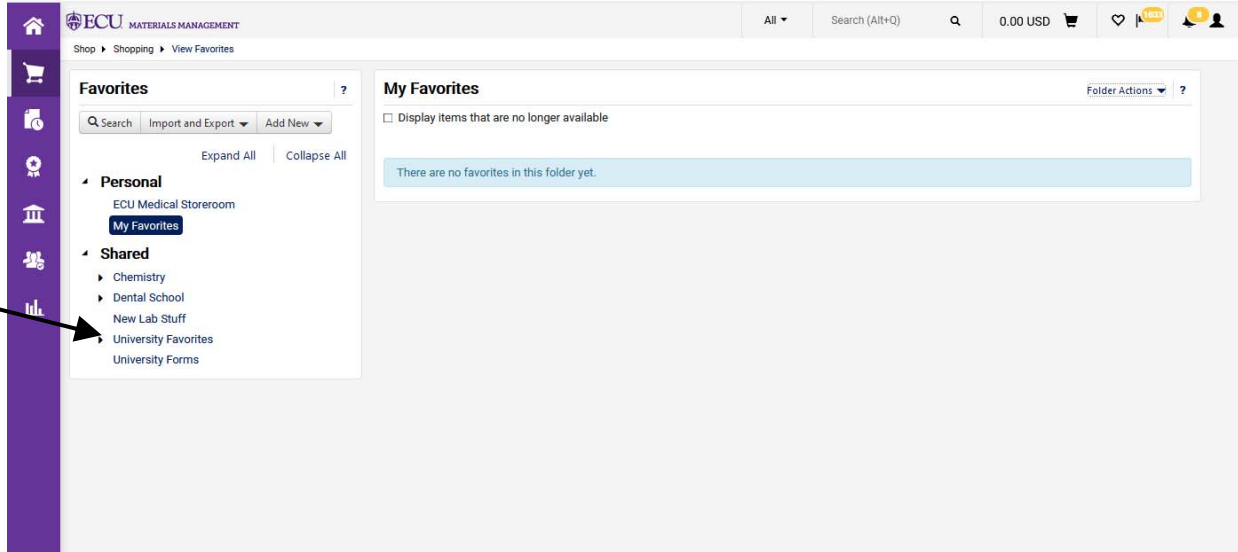
1. Click on Shopping Cart icon.



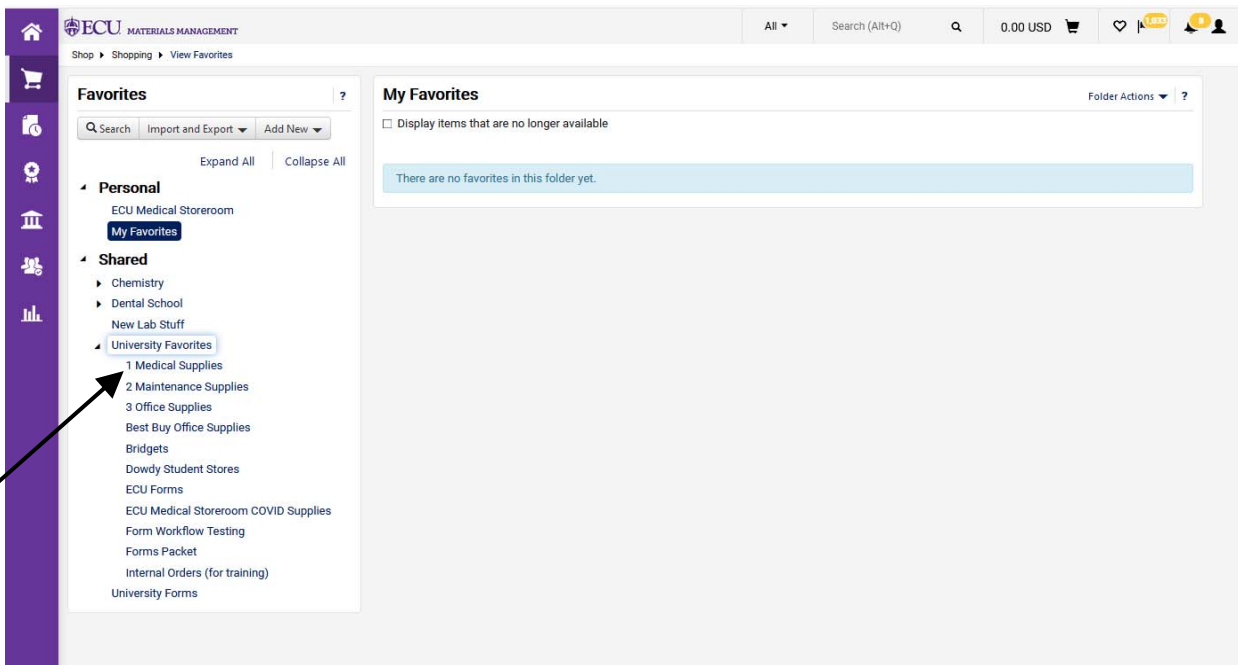
2. Click on View Favorites.

USE UNIVERSITY FAVORITE ITEMS

Last Updated on: 5/19/2021



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: 5/19/2021

7.

5.

6.

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 were selected in the previous step.

8.

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

USE UNIVERSITY FAVORITE ITEMS

Last Updated on: 5/19/2021

9.

ECU MATERIALS MANAGEMENT

Shop > Shopping > View Favorites

My Cart (2021-05-19 brownb 01)

1 Medical Supplies

Generic hand soap

FDC2000 DISP CONNECTO SYRI...

ALCOHOL PREPS LARGE 200/BO...

BULK GAUZE N/S 2"X2" 4PLY 200/PK NW2204

FDC2000 DISP CONNECTO SYRINGE CS/100/ 415081

Generic hand soap

View My Cart

Checkout

258.10 USD

Folder Actions

Selected Favorites

150 Per Page

5.22 USD

1/BX

Add to Cart

/ backordered
ical Supplies)

check other locations...

Copy

0.65 USD

1/PK

Add to Cart

Out of stock (Medical Supplies)
check other locations...

Copy

58.00 USD

1/CS

Add to Cart

In stock (Medical Supplies)
check other locations...

Copy

20.88 USD

1/BO

Add to Cart

Out of stock (Medical Supplies)
check other locations...

Copy

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

10.

ECU MATERIALS MANAGEMENT

Shopping Cart

Simple Advanced

Search for products, suppliers, forms, part number, etc.

Priority: Normal

Business Purpose / Note to Approvers

Backup Required

Prepared by: Bridget Brown

Prepared for: Bridget Brown

State Exempt

Cart Name: 2021-05-19 brownb 01

Special Instructions: None

Notes to Suppliers

Correct these issues.
You are unable to proceed until addressed.
Required: State Exempt

Details

For: Bridget Brown

Estimate (258.10 USD)

Subtotal: 258.10

Shipping: 0.00

Handling: 0.00

Total: 258.10 USD

Proceed To Checkout

Assign Cart

6 Items

ECU Medical Storeroom - 6 Items - 258.10 USD

SUPPLIER DETAILS: Medical Supplies : 600 Moye Blvd, Brody Som Gw...

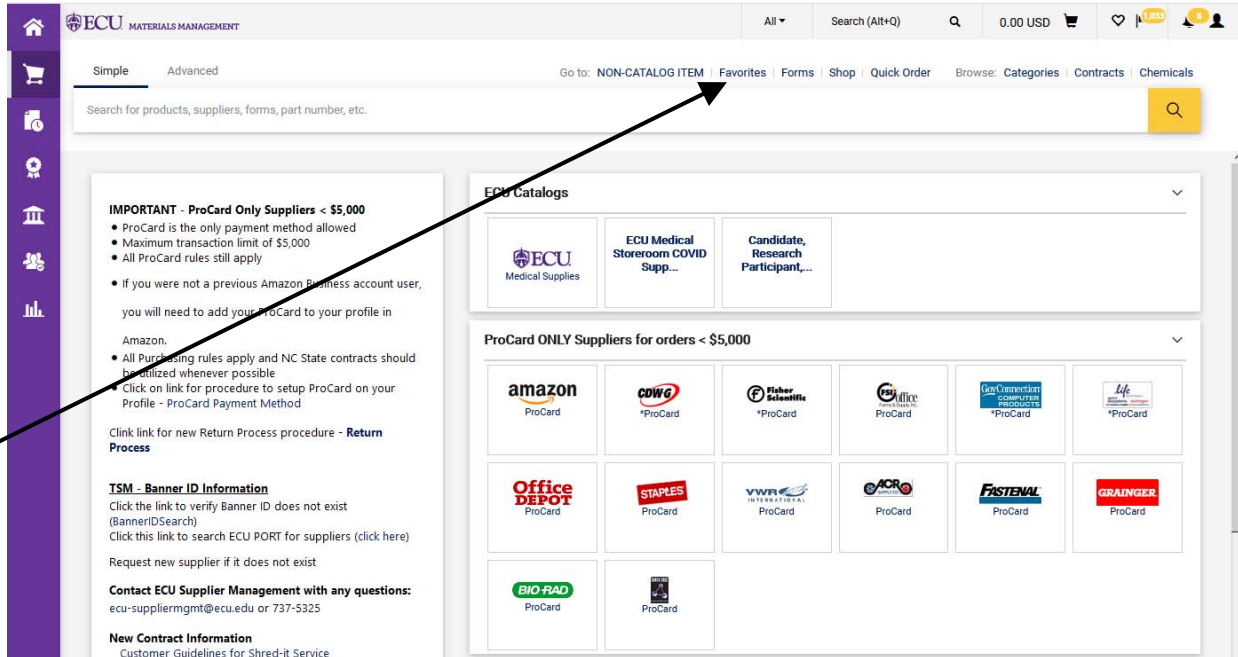
Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 ALCOHOL PREPS LARGE 200/BOX KENDALL 5110	040-21020	1/BX	5.22	1 BX	5.22

Contract:

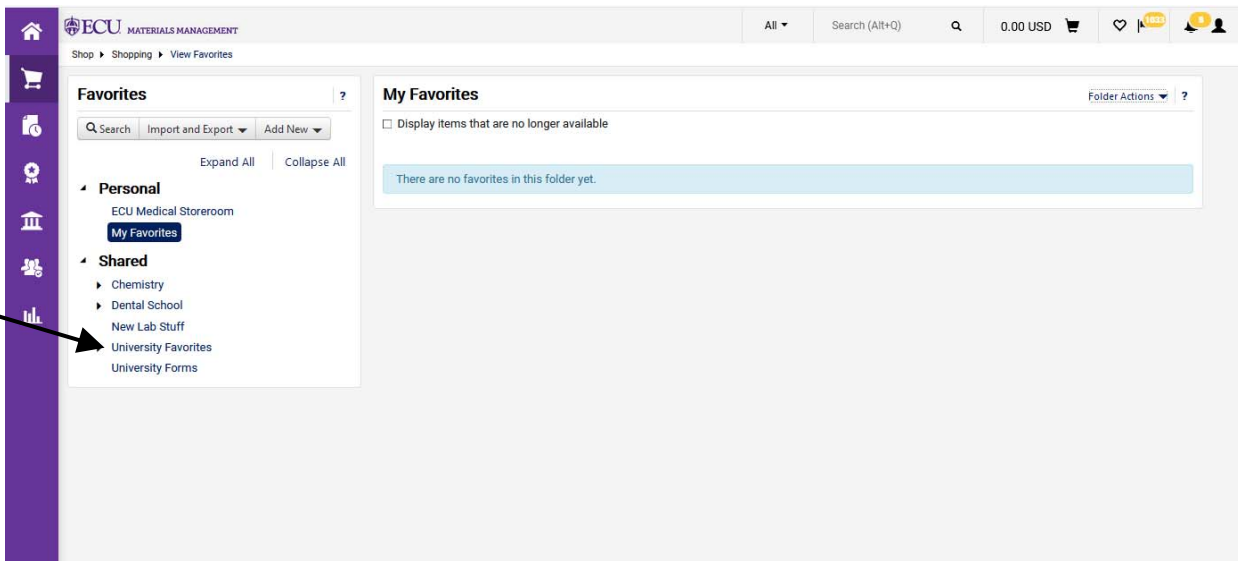
10. This completes the steps for using university favorites and brings you to the **New Shopping Cart** edit section. See the **Edit Cart Header** procedure to continue the review process.

COPY FAVORITE ITEMS

Last Updated on: 5/19/2021



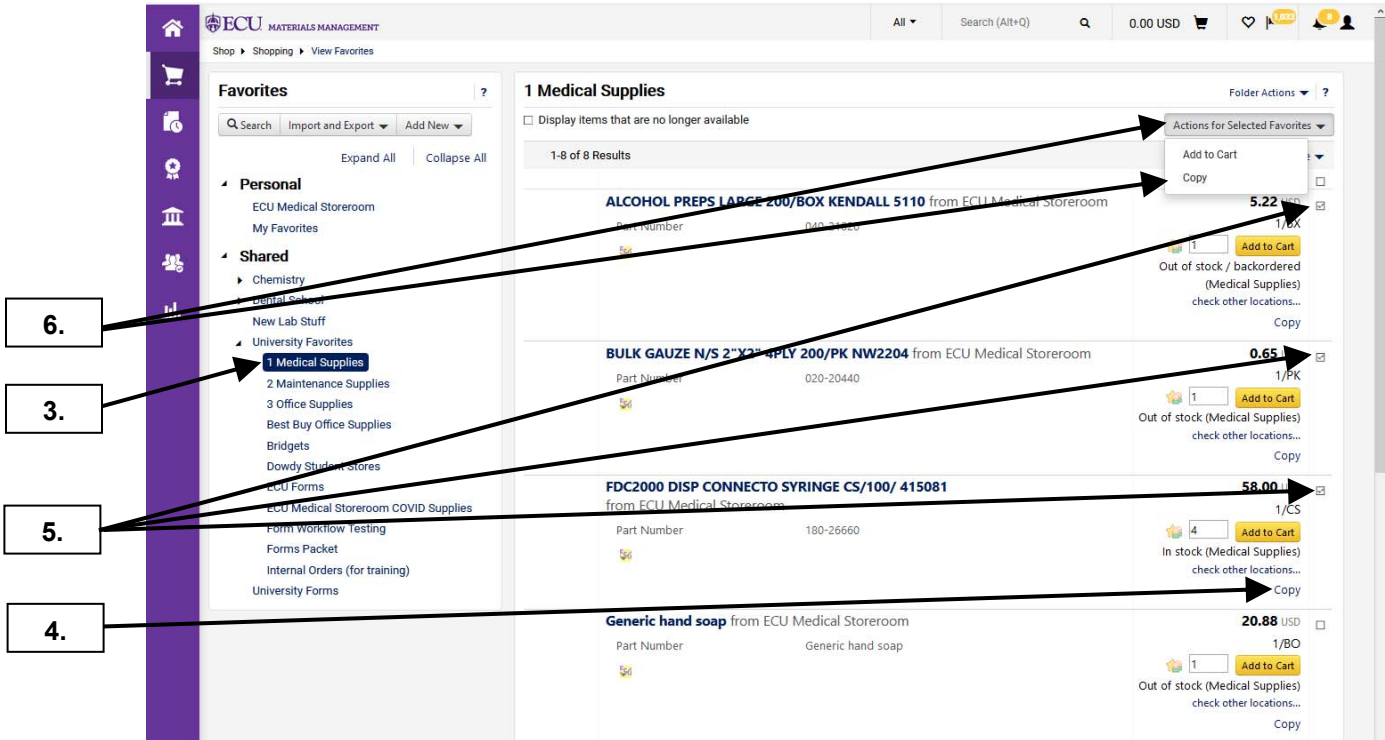
1. Click on **Favorites** link.



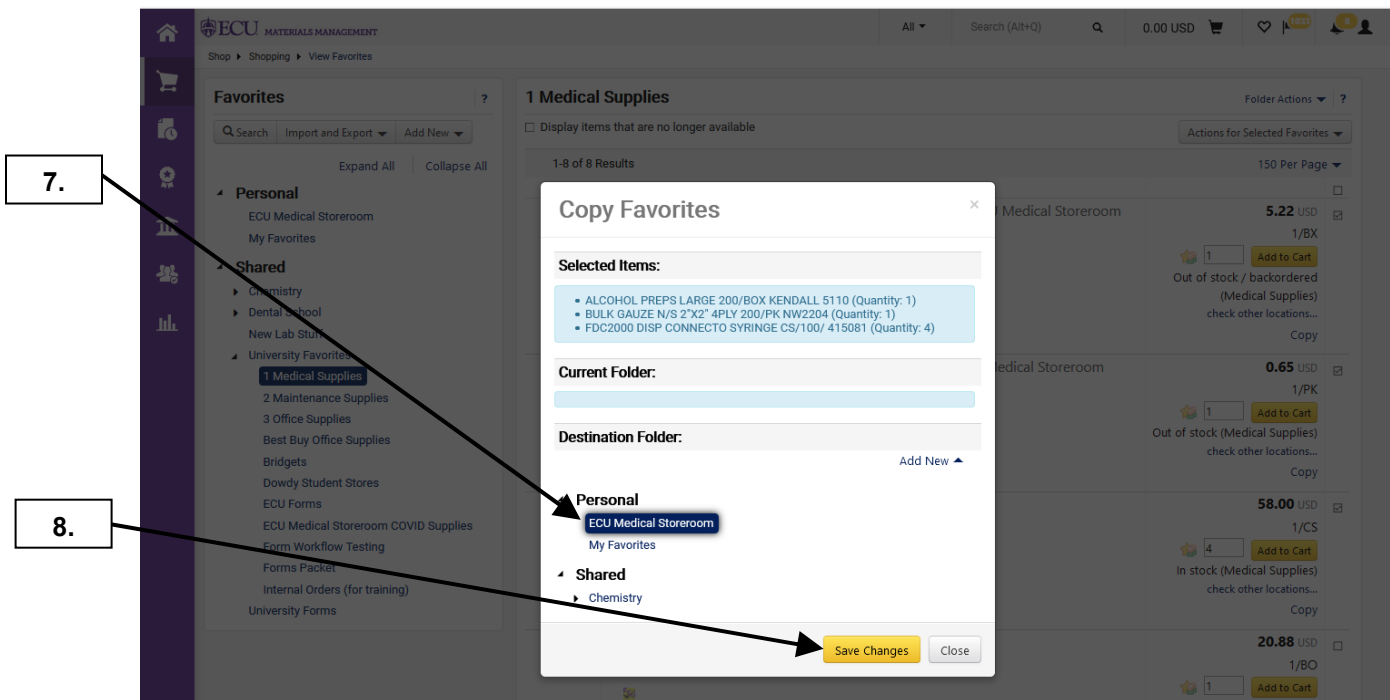
2. Click on **expand/collapse** icon beside **University Favorites**. In this example, we will copy favorites from **1 Medical Supplies** (under **University Favorites**) to **ECU Medical Storeroom** (under **Personal**).

COPY FAVORITE ITEMS

Last Updated on: 5/19/2021



3. Select the **1 Medical 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 Storeroom** folder.
8. Click on **Save Changes** button.

COPY FAVORITE ITEMS

Last Updated on: 5/19/2021

The screenshot displays the ECU Materials Management interface. On the left, a vertical navigation bar contains icons for Home, Shopping, Favorites, and a search icon. The Favorites section is expanded, showing a 'Personal' folder containing 'ECU Medical Storeroom' and 'My Favorites', and a 'Shared' folder with sub-folders for 'Chemistry', 'Dental School', 'New Lab Stuff', 'University Favorites', and 'University Forms'. The 'ECU Medical Storeroom' folder is selected, displaying a list of 6 items. The items are:

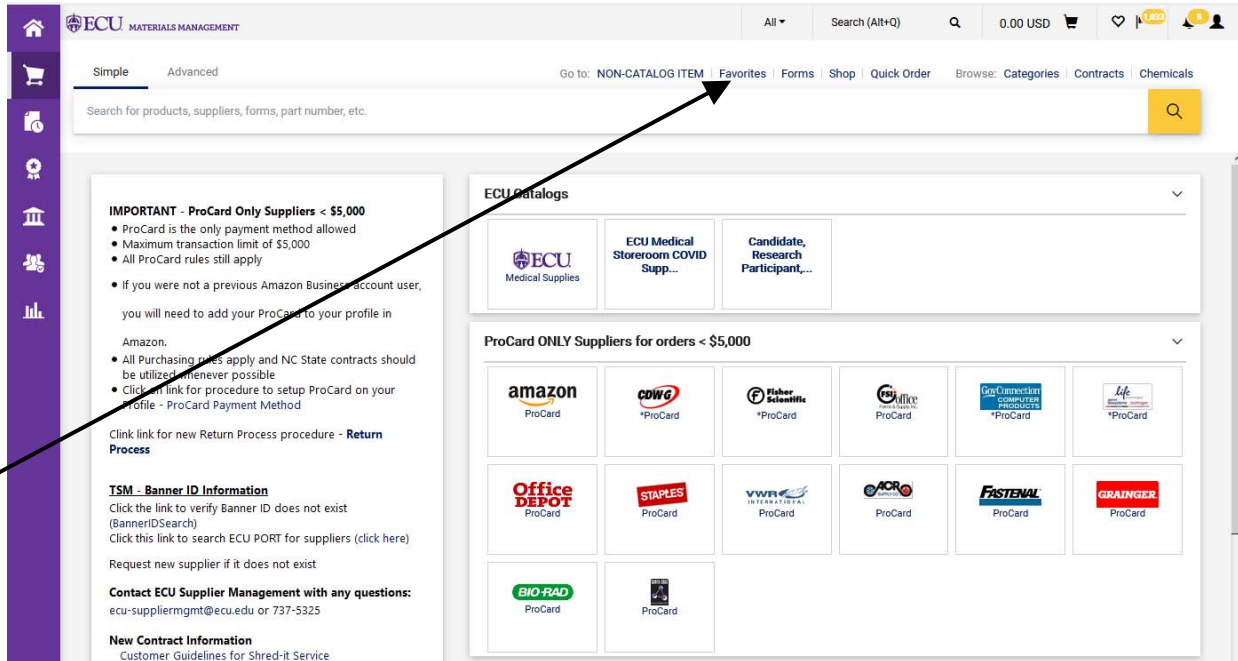
Item Name	Part Number	Price	Availability
ALCOHOL PREPS LARGE 200/BOX KENDALL 5110 from ECU Medical Storeroom	040-21020	5.22 USD	Out of stock / backordered (Medical Supplies)
BULK GAUZE N/S 2"X2" 4PLY 200/PK NW2204 from ECU Medical Storeroom	020-20440	0.65 USD	Out of stock (Medical Supplies)
DERMABOND ADHESIVE TOPICALSKIN 12/BOX J&J DB-12 from ECU Medical Storeroom	140-24790	370.04 USD	In stock (Medical Supplies)
FDC2000 DISP CONNECTO SYRINGE CS/100/ 415081 from ECU Medical Storeroom	180-26660	58.00 USD	In stock (Medical Supplies)

Annotations with numbered boxes point to specific elements: 11. points to the Home icon in the navigation bar; 9. points to the 'ECU Medical Storeroom' folder in the Favorites list; 10. points to the first four items in the 'ECU Medical Storeroom' folder.

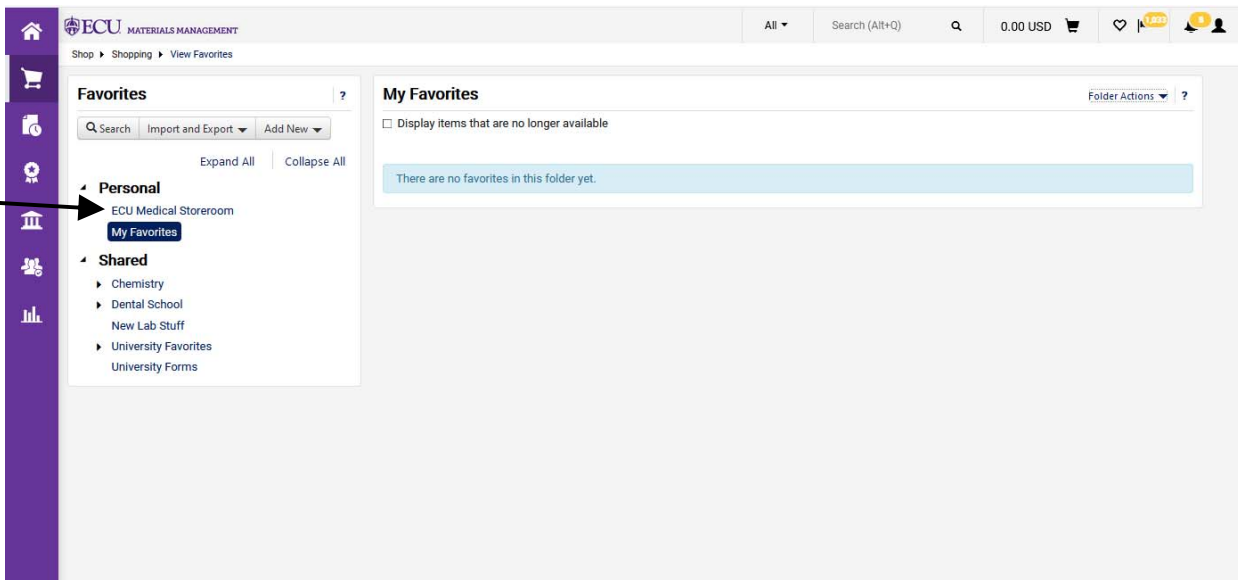
- 9. Check **ECU Medical Storeroom** folder under Personal to confirm the items were moved from **1 Medical Supplies** folder
- 10. Notice the items were moved to **ECU Medical Storeroom** folder.
- 11. This completes the steps for this procedure. Click on the **ECU** icon to return to the home page.

DELETE FAVORITE ITEMS

Last Updated on: 5/19/2021



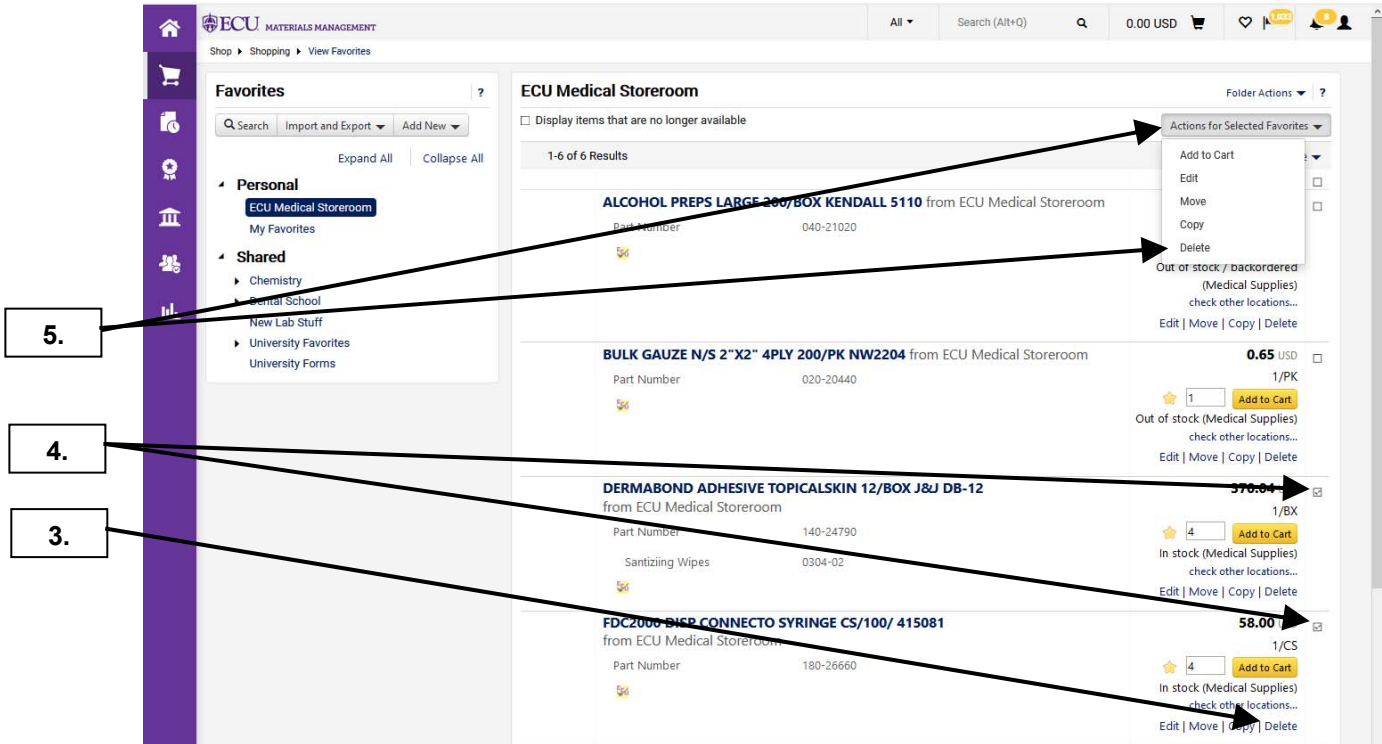
1. Click on **Favorites** link.



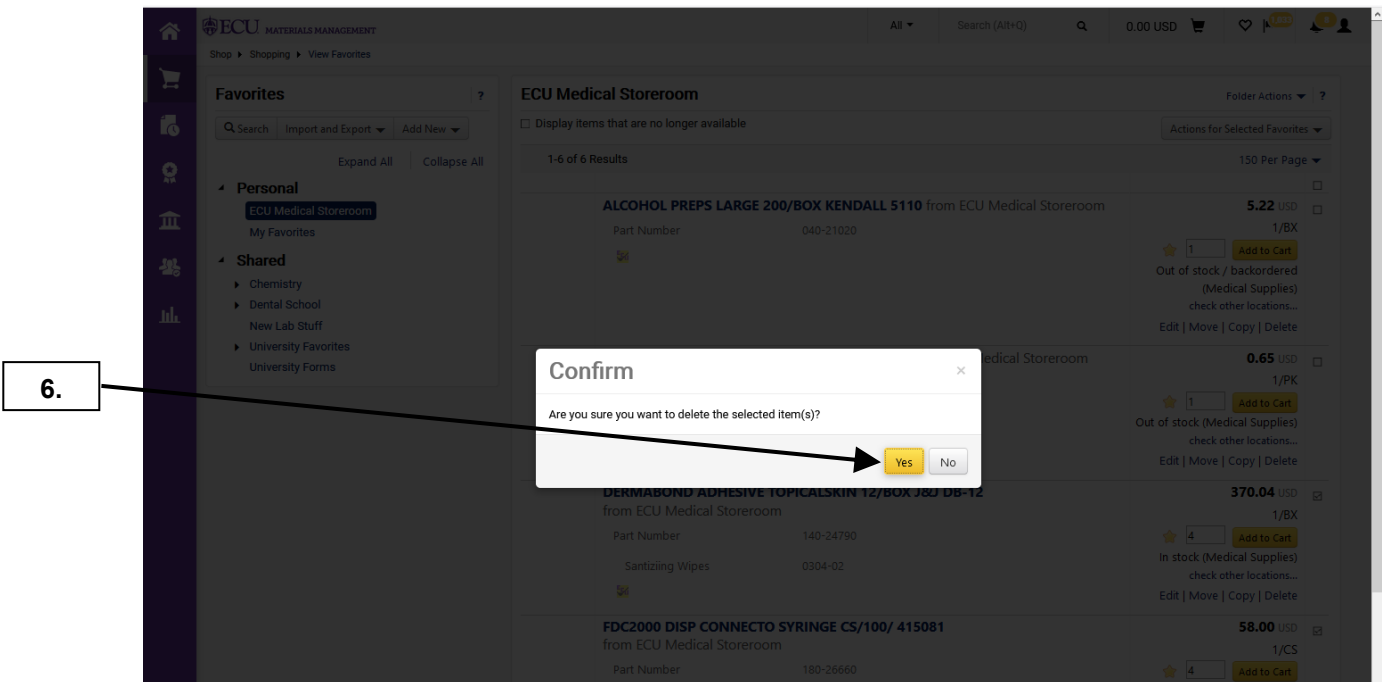
2. Click on the folder under **Personal** that contains the item (s) to delete from your favorites. In this example, we will be deleting items from the **ECU Medical Storeroom** folder.

DELETE FAVORITE ITEMS

Last Updated on: 5/19/2021



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: 5/19/2021

The screenshot displays the 'Favorites' section of the ECU Materials Management system. The left sidebar shows a tree view of folders under 'Personal' and 'Shared'. The 'ECU Medical Storeroom' folder is highlighted. The main content area shows a list of items from this folder. The items are:

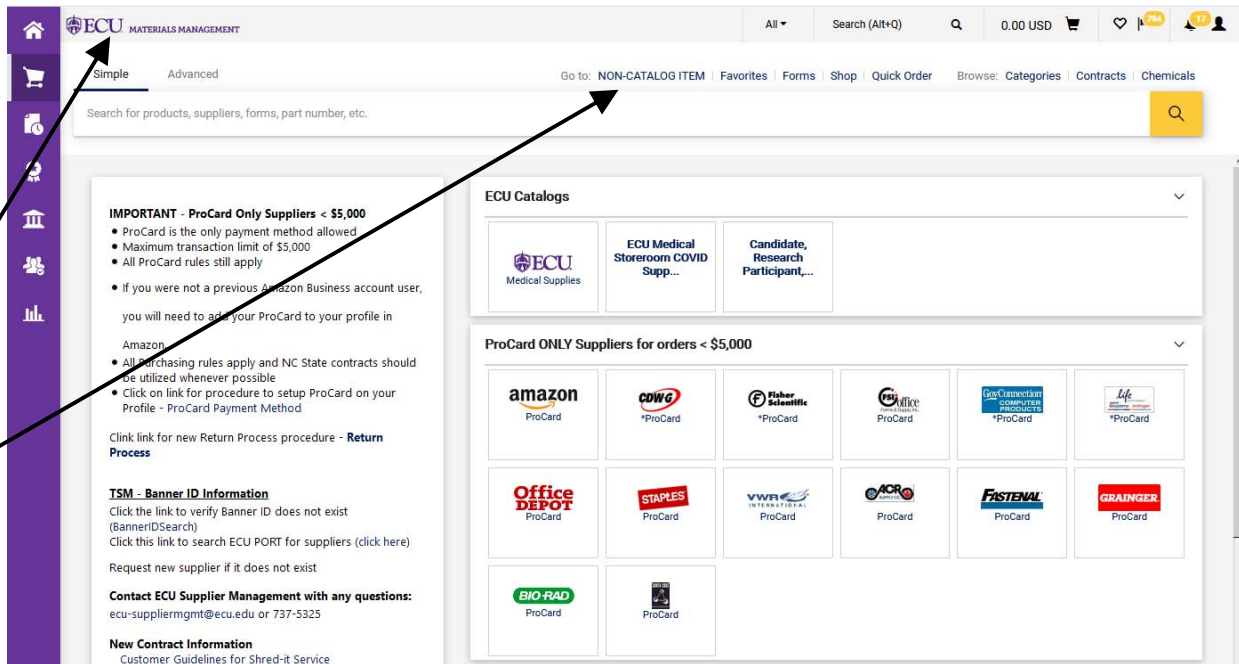
- ALCOHOL PREPS LARGE 200/BOX KENDALL 5110** from ECU Medical Storeroom, Part Number 040-21020, Price 5.22 USD, 1/BOX. Status: Out of stock / backordered (Medical Supplies).
- BULK GAUZE N/S 2"X2" 4PLY 200/PK NW2204** from ECU Medical Storeroom, Part Number 020-20440, Price 0.65 USD, 1/PK. Status: Out of stock (Medical Supplies).
- GLASS CLEANER EACH 620682** from ECU Medical Storeroom, Part Number 235-06050, Price 4.04 USD, 1/EA. Status: In stock (Medical Supplies).
- LATEX SURGEONS,ST 7.5 SENSIGRI 50 PAIRS/BOX ANSELPERRY7825** from ECU Medical Storeroom, Part Number 120-23240, Price 19.52 USD, 1/BOX. Status: In stock (Medical Supplies).

Callout 7. points to the 'ECU Medical Storeroom' folder in the sidebar. Callout 8. points to the 'ECU' logo in the top navigation bar.

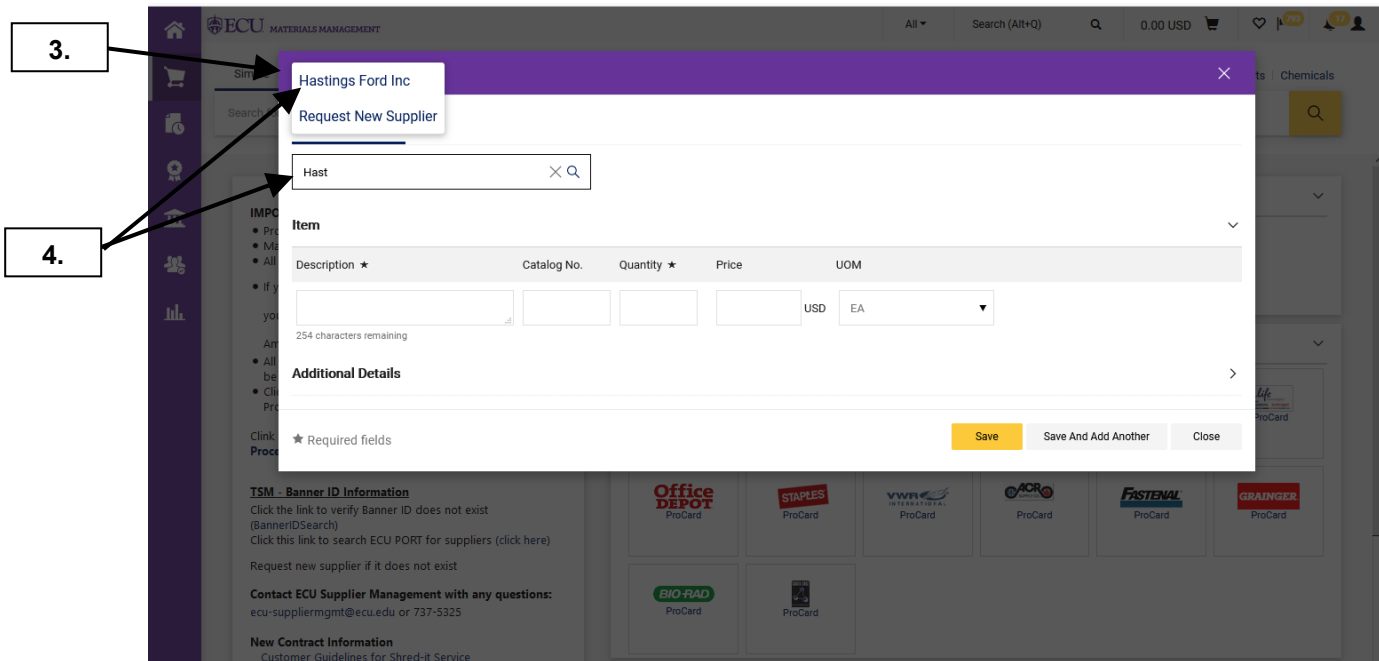
7. Notice that the item(s) has been removed from **ECU Medical Storeroom** folder.
8. This completes the steps for this procedure. Click on **ECU** icon to return to the home page.

SHOPPING CART – NON-CATALOG ITEM

Last Updated on: 7/20/2021



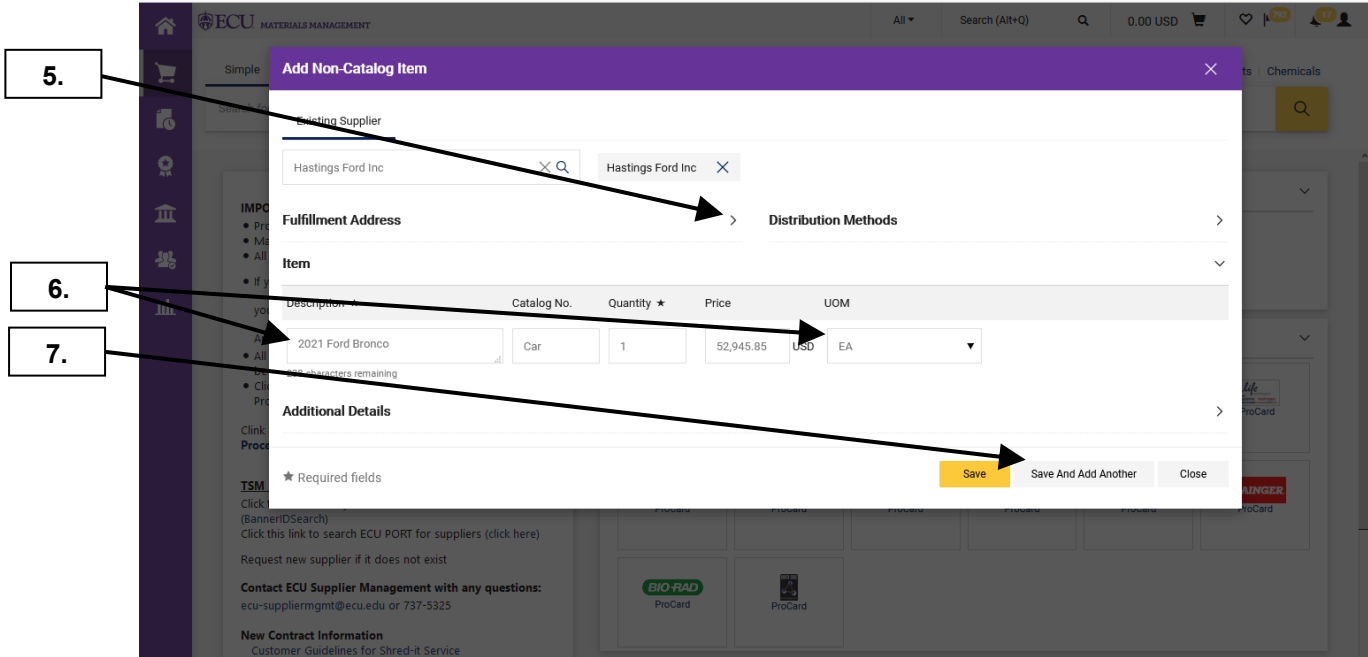
1. Ensure that you are on the **home/shop** page. **Important Note:** The Non-Catalog Item has replaced the non-Catalog Form with a cleaner interface for adding items to a cart.
2. Click on **NON-CATALOG ITEM** link.



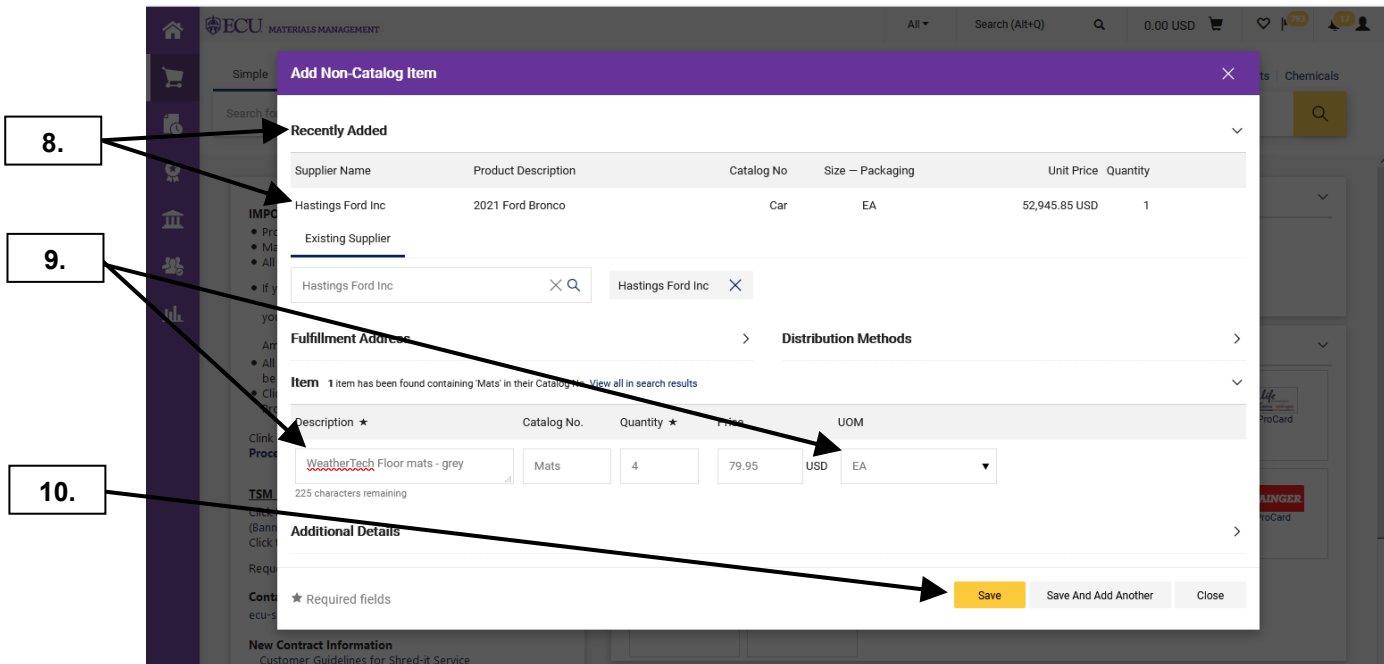
3. A new window pops up to display the **Non-Catalog Item**.
4. Type the Vendor's name in the **Enter Supplier** field. A drop-down list will automatically display and begin filtering based on the characters that you type. Select the appropriate supplier from the list.

SHOPPING CART – NON-CATALOG ITEM

Last Updated on: 7/20/2021



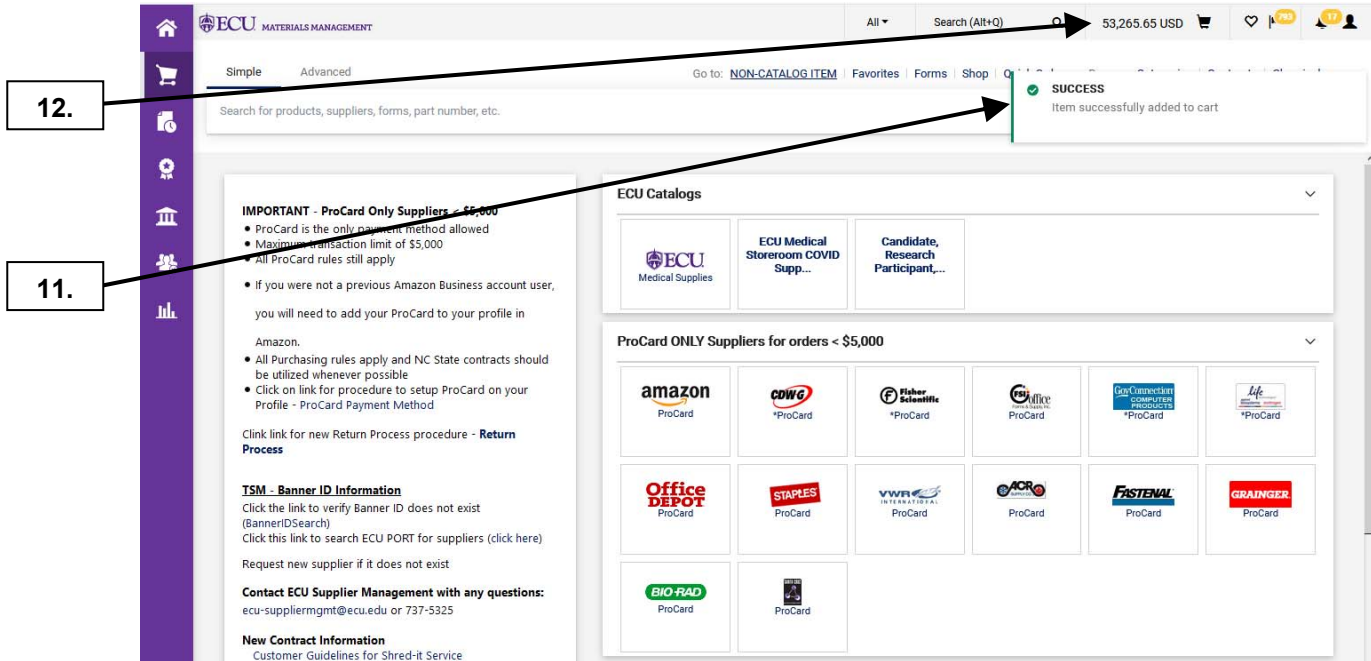
5. You can click on the **Fulfillment Address** arrow to see the address where the PO will be delivered.
6. Enter the appropriate information for the following fields: **Description, Catalog No., Quantity, Price, and Unit of Measure (UOM)**. **Note:** The information you are entering should be from supplier's 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** 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** 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** button.

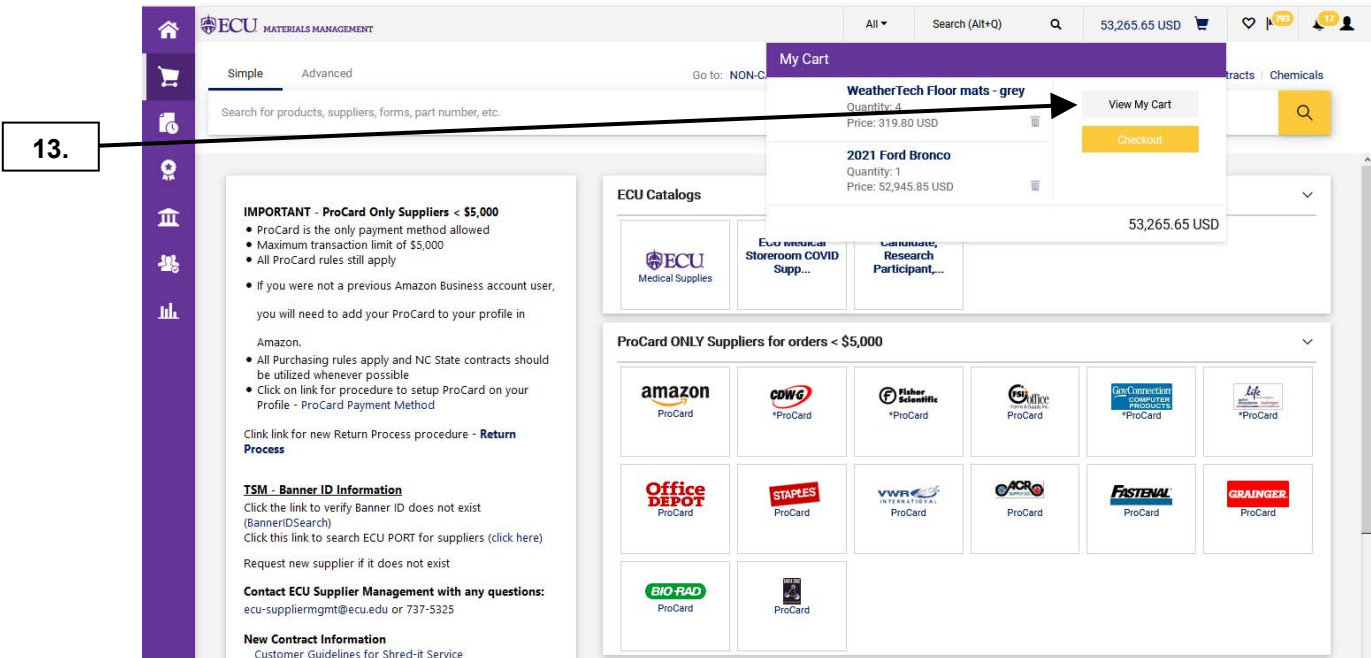
SHOPPING CART – NON-CATALOG ITEM

Last Updated on: 7/20/2021



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

12. Click on the shopping cart.



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

SHOPPING CART – NON-CATALOG ITEM

Last Updated on: 7/20/2021

14.

Shopping Cart · 3297103

Simple Advanced

Search for products, suppliers, forms, part number, etc.

Priority: Normal

Prepared by: Bridget Brown

Prepared for: Bridget Brown

Cart Name: 2021-07-20 alphinc 01

Business Purpose / Note to Approvers

State Exempt

Backup Required

Special Instructions: None

Notes to Suppliers

Required

Correct these issues. You are unable to proceed until addressed. Required: State Exempt

Details For Bridget Brown

Estimate (53,265.65 USD)

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	2021 Ford Bronco	Car	EA	52,945.85	1 EA 52,945.85
2	WeatherTech Floor mats -grey	Mats	EA	79.95	4 EA 319.80

Subtotal: 53,265.65

Shipping: 0.00

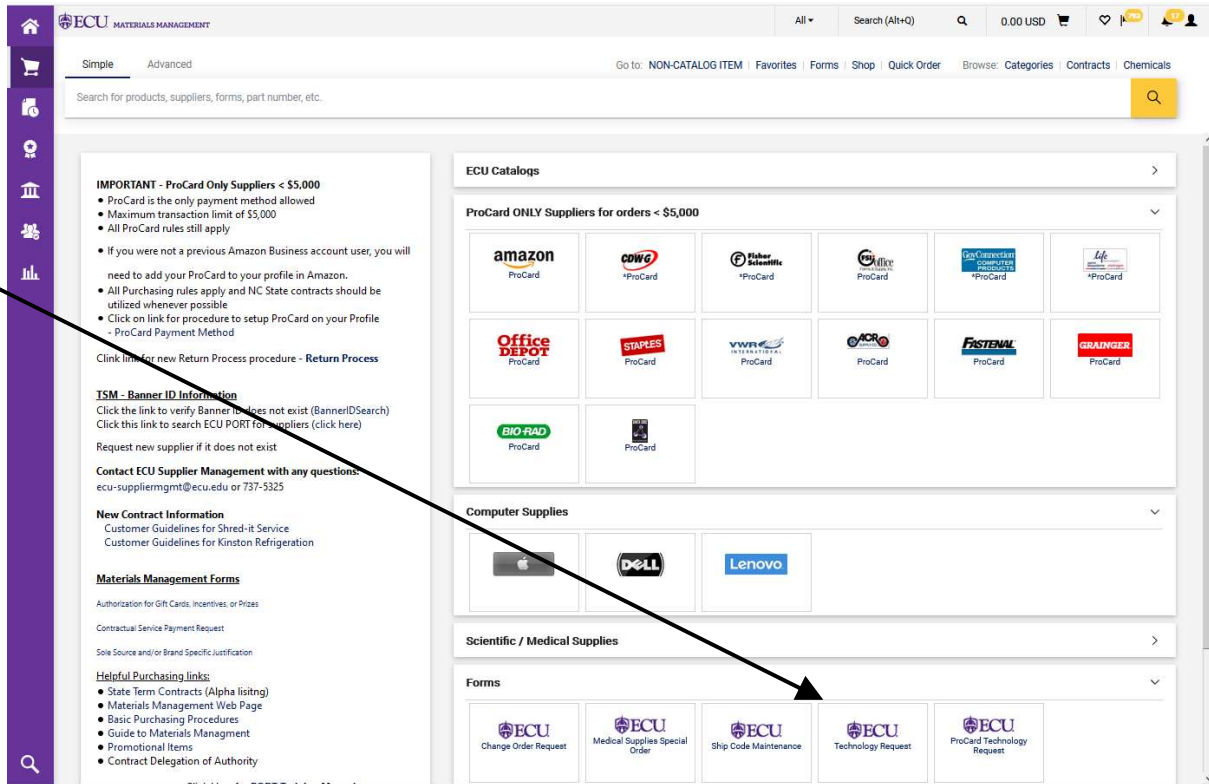
Handling: 0.00

Total: 53,265.65 USD

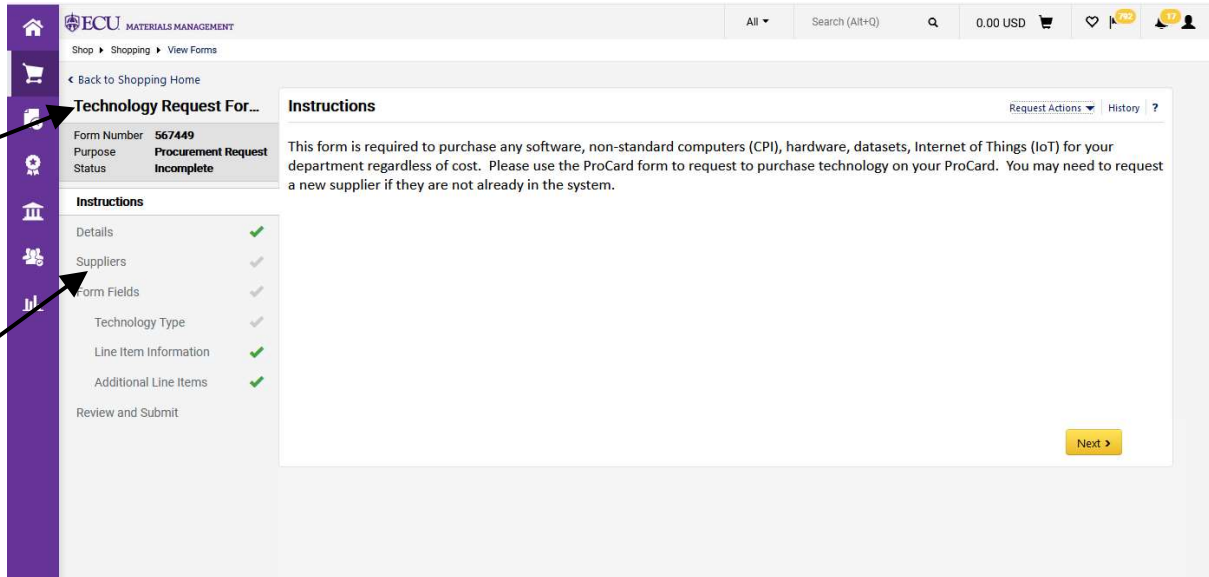
14. This brings you to the **Shopping Cart** review section. See the **Edit Cart Header** procedure to continue the review process.

TECHNOLOGY REQUEST FORM

Last Updated on: 6/29/2022



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: 6/29/2022

The screenshot shows the 'Suppliers' section of the Technology Request Form. The form number is 567449, and the purpose is 'Procurement Request' with a status of 'Incomplete'. The 'Suppliers' step is highlighted in the left sidebar. The main content area shows a search form for registered suppliers. The search criteria are: Supplier: Dell, Relationship: All, and Zip Code: [blank] Within 5 Miles. A yellow 'Search' button is visible at the bottom right of the search form. A black box with the number '4.' has an arrow pointing to the search form area.

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

The screenshot shows the search results for the supplier 'Dell Marketing LP'. The results are displayed in a table with columns for 'Supplier Name', 'Doing Business As', 'Fulfillment Centers', and 'Action'. The 'Action' column contains 'Select' buttons for each fulfillment center. A black box with the number '5.' has an arrow pointing to the 'Select' button for the fulfillment center 'PO Purchase Order 1: (preferred)'. The table data is as follows:

Supplier Name	Doing Business As	Fulfillment Centers	Action
Dell Marketing LP		PO Purchase Order 10 9286 Winstead Ave, Raleigh, North Carolina 27920 United States	Select
		PO Purchase Order 101 1285 Greenville Blvd, Greenville, North Carolina 27858 United States	Select
		PO Purchase Order 1: (preferred) One Dell Way, Bldg RR8, Round Rock, Texas 78682-0384 United States	Select
		PO Purchase Order 2 Warranty Parts Direct, 1 Dell Way Bldg RR8, Round Rock, Texas 78682-0384 United States	Select
		PO Purchase Order 3 1242 Greenville Blvd, Greenville, North Carolina 27858 United States	Select
		PO Purchase Order 5 1482 Capital Blvd, Greenville, North Carolina 278990 United States	Select
		PO Purchase Order 6 1522 Winstead Ave, Richmond, Virginia 20390 United States	Select
		PO Purchase Order 7 451 Main St, Greenville, North Carolina 27858 United States	Select

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: 6/29/2022

6.

7.

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

8.

9.

8. Review the information and definitions of the 7 types of technology. Note the new information and quick link to Technology Request Exemption List.
9. Click **Type of Technology Request** drop-down box.

TECHNOLOGY REQUEST FORM

Last Updated on: 6/29/2022

The screenshot shows the 'Form Fields - Technology Type' section of the Technology Request Form. On the left sidebar, a vertical navigation menu has three items highlighted with boxes and arrows: '12.' points to the 'Technology Type' menu item, '10.' points to the 'Type of Technology Request' dropdown menu, and '11.' points to the 'Description' text area. The main content area shows the 'Technology Determination' section with instructions and a list of technology options. At the bottom, there are 'Previous', 'Save Progress', and 'Next' buttons.

10. Select appropriate technology for your request. For this example, we'll select **Software**.
11. Provide a brief description of technology and why it is being purchased.
12. Click **Save Progress** button.

The screenshot shows the 'Form Fields - Technology Type' section of the Technology Request Form. On the left sidebar, a vertical navigation menu has two items highlighted with boxes and arrows: '13.' points to the 'Questions' menu item, and '14.' points to the 'Next' button. The main content area shows the 'Technology Determination' section with instructions and a list of technology options. The 'Type of Technology Request' dropdown menu is set to 'Software'.

13. 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 **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.
14. You can click on **Question** section or **Next** button.

TECHNOLOGY REQUEST FORM

Last Updated on: 6/29/2022

The screenshot shows the 'Form Fields - Questions' section of a 'Technology Request Form' in the ECU Materials Management system. The form is for Form Number 693276, with a Purpose of 'Procurement Request' and a Status of 'Incomplete'. The 'Software Questions' section includes instructions to answer all questions to the best of one's knowledge and notes that ITCS will review the purchase. A dropdown menu for 'Approximately how many people will use the software?' is set to '11-99'. The 'Who will use the product?' section has radio buttons for 'Enterprise (all faculty/staff/students)', 'Faculty/Staff' (checked), 'Students', and 'Departmental Use', along with a 'General Public' checkbox. The 'Is this purchase for an academic course?' section has 'Yes' (checked) and 'No' radio buttons, with a text field for 'Enter the course ID/name' containing 'ACCT 2245'. The 'Where will the software data reside?' section has radio buttons for 'ECU (on a local university server/computer)' and 'Vendor (on an external (outside of ECU) server/computer, cloud based)' (checked). A final question asks 'Will this application use an email service?'. Callouts 15-19 point to the star symbol for required fields, the user count dropdown, the 'Who will use the product?' section, the 'Is this purchase for an academic course?' section, and the 'Where will the software data reside?' section, respectively.

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

16. Select the appropriate number of users for each license of the software.

Note: Selecting 11 or more users will require you to answer **ADA questions (Step 29)**.

17. Select **Who will use this product**, check **All that Apply**.

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

19. Click the radio button corresponding to the accurate location where the data will be stored. **Note:** Data which resides outside ECU may require additional documentation, **Memorandums of Understanding (MOU)**, before your request can be processed. In addition, new conditional question will appear **“Will the application use an email service?”**. Scroll down the page to continue.

TECHNOLOGY REQUEST FORM

Last Updated on: 6/29/2022

20. Will this application use an email service? *

21. Does this product have a Canvas LMS Integration? *

22. Data Use Identification - Classify the type of sensitive data this system will use (see definitions below).

- Student Financial Aid (GLBA). Information obtained from students when offering financial aid products and services like loans or financial advice.
- Financial Cash Management (Financial Services). Information regarding how monies will be deposited from a supplier to the University.
- Protected Health Information (HIPAA). Any information about health status, provision of health care, or payment for health care that is created by a Covered Entity (or Business Associate of a Covered Entity) and can be linked to a specific individual or the information can be used to identify an individual. Information can be in any form - oral, written, or electronic - and may reference past, present, or future (1) physical or mental health conditions or (2) financial information for health care.
- Academic (FERPA). Records, files, documents, and other materials containing educational information, PII, or directory information of students maintained by the university or by a person/entity for the university.
- Credit Card Numbers (PCI). Any data relating to credit card payments or the storage, processing, or transmission of cardholder data and/or sensitive data. Cardholder data consists of the full primary account number (PAN) and may also appear in the form of the full PAN plus any of the following - cardholder name, expiration date, and/or service code.
- Human Subject Research (IRB). Human subject research data can be either medical (clinical) or non-medical (e.g., social science) information containing personally identifiable information (PII). This data may or may not be subject to HIPAA.
- SSN/PII (ITPA). Any data that could potentially identify an individual, such as Social Security Number (SSN), driver's license or state identification number, passport number, etc.
- Employment (HR). Any data relating to personnel files designated as confidential of current or former employees.
- General Data Protection Regulation (GDPR). Information obtained from individuals within the European Union (EU) or the European Economic Area (EEA).
- Internal Data. University owned or managed data that includes information that is not openly shared with the general public but is not specifically required to be protected by statute or regulation. Internal data includes but is not limited to: budget and salary information, personal cell phone numbers, departmental standard operating procedures, internal memos, and incomplete or unpublished research.

- 20. Answer the following question so ITCS can determine if the software follows best practices and security standards: **Will this application use an email service?**
- 21. Indicate if the software has a Canvas LMS Integration.
- 22. **Note** the definitions for the various data types.

23. Select appropriate option(s) for data: *

<input checked="" type="checkbox"/> No Sensitive Data	<input type="checkbox"/> Credit Card Numbers (PCI)	<input type="checkbox"/> Student Financial Aid (GLBA)	<input type="checkbox"/> Financial Cash Management (Financial Services)
<input type="checkbox"/> Human Research Subjects (IRB)	<input type="checkbox"/> Protected Health Information (HIPAA)	<input type="checkbox"/> SSN/PII (ITPC)	<input type="checkbox"/> Academic (FERPA)
<input type="checkbox"/> Employment (HR)	<input type="checkbox"/> General Data Protection Regulation (GDPR)	<input type="checkbox"/> Internal Data	

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

25. 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. *

25. I certify this is correct

25. Is this a request to renew an existing technology purchase? *

26. Microsoft Azure SSO (Single Sign On) - Will this technology use ECU Credentials? *

26. Yes No

27. Please ensure that any appropriate modules/upgrades are included in this product to ensure support of Microsoft Azure SSO.

27. Microsoft Azure MFA (Multi-Factor Authentication) - Does this technology support the use of Microsoft Azure MFA. (Multi-factor authentication is when a user must provide two or more pieces of evidence to verify their identity to gain access to an app or digital resource.) *

27. Yes No

28. Please ensure that any appropriate modules/upgrades are included in this product to ensure support of Microsoft Azure MFA.

28. [Next](#)

- 23. Check all the appropriate classifications of data involving this software purchase use.
- 24. Select the required **check box** to certify the information provided.
- 25. Click the appropriate radio button to indicate if this will be a renewal of an existing technology purchase.
- 26. Click the appropriate radio button to indicate if technology will use ECU Credentials for Single Sign-On.
- 27. Click the appropriate radio button to indicate if technology supports Multi-Factor Authentication.
- 28. Click **Next** button to proceed to the next form section.

TECHNOLOGY REQUEST FORM

Last Updated on: 6/29/2022

The screenshot shows the 'Technology Request Form' for Form Number 693276. The 'Form Fields - ADA Compliance' section is active, showing instructions and an 'Accessibility Section' with a 'Response Is Required' status. The left sidebar contains a navigation menu with a callout '29.' pointing to the 'ADA Compliance' item. The main content area has a callout '30.' pointing to the 'Accessibility Section' text.

29. If 11 or more users was selected in **Step 16** then the **ADA Compliance** section was triggered, and responses will be required to complete the form.

30. Information regarding IT Accessibility Standards can be found through the link provided.

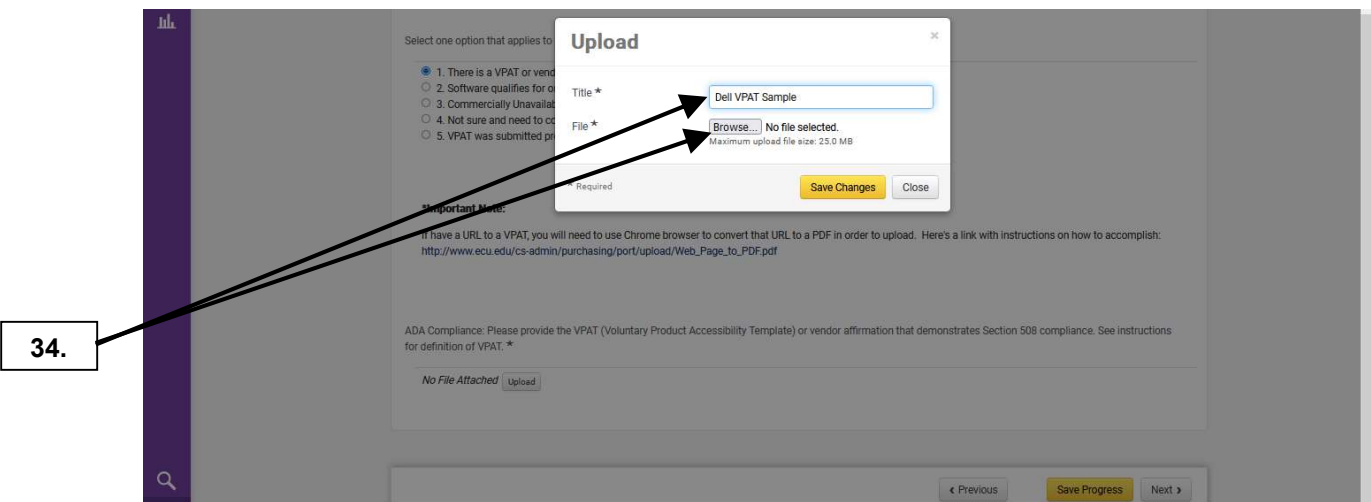
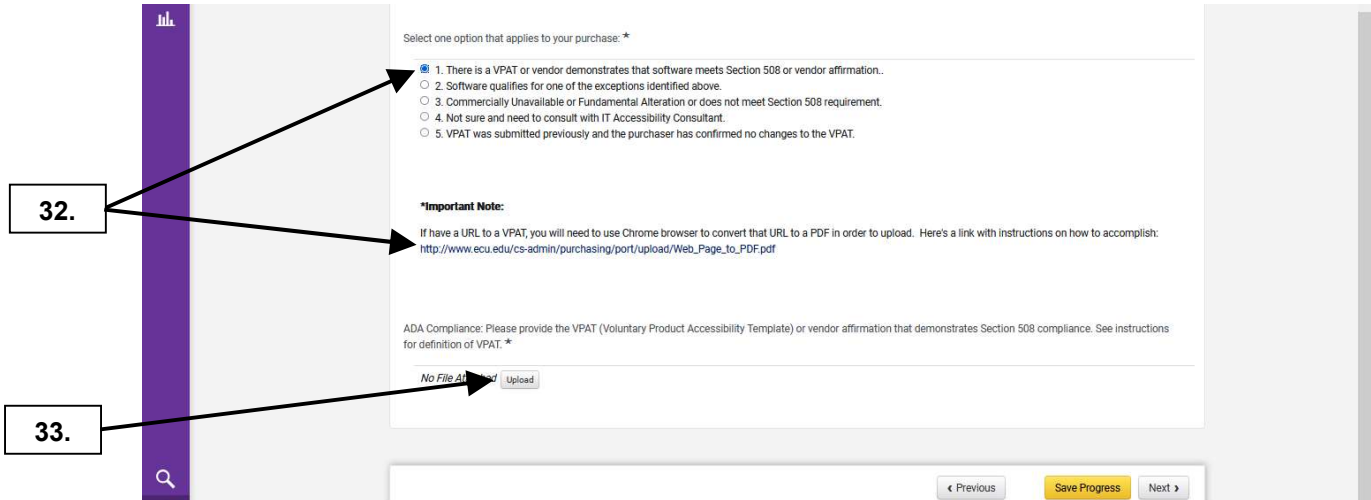
Note: Scroll down the page to complete the questions.

The screenshot shows the 'Accessibility Section' of the form. It includes detailed instructions for ensuring Section 508 compliance and accessibility, with five radio button options for selection. The left sidebar has a callout '31.' pointing to the 'Accessibility Section' text. The main content area has a callout '31.' pointing to the radio button options.

31. 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.

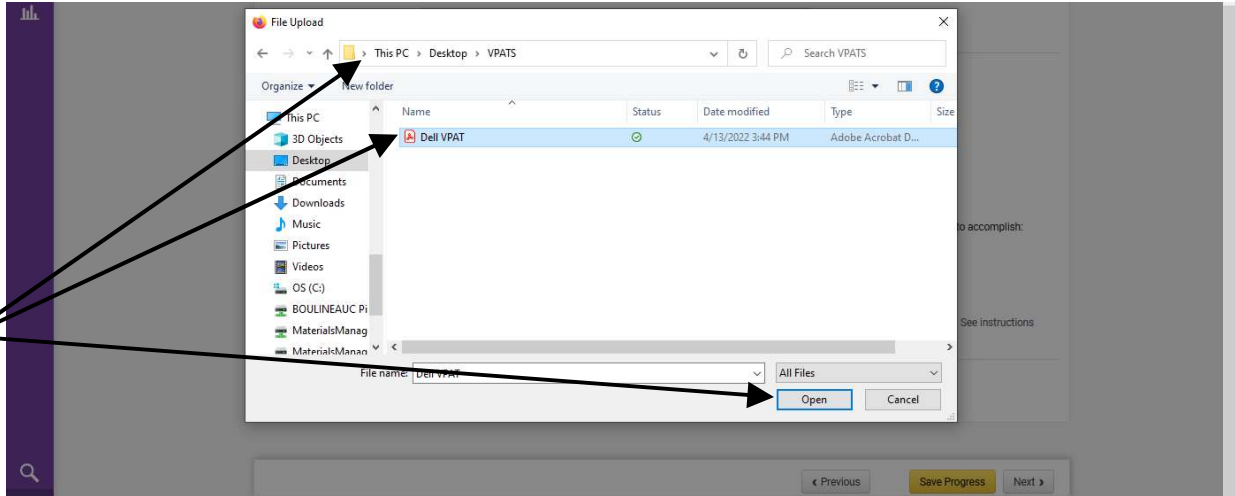
TECHNOLOGY REQUEST FORM

Last Updated on: 6/29/2022

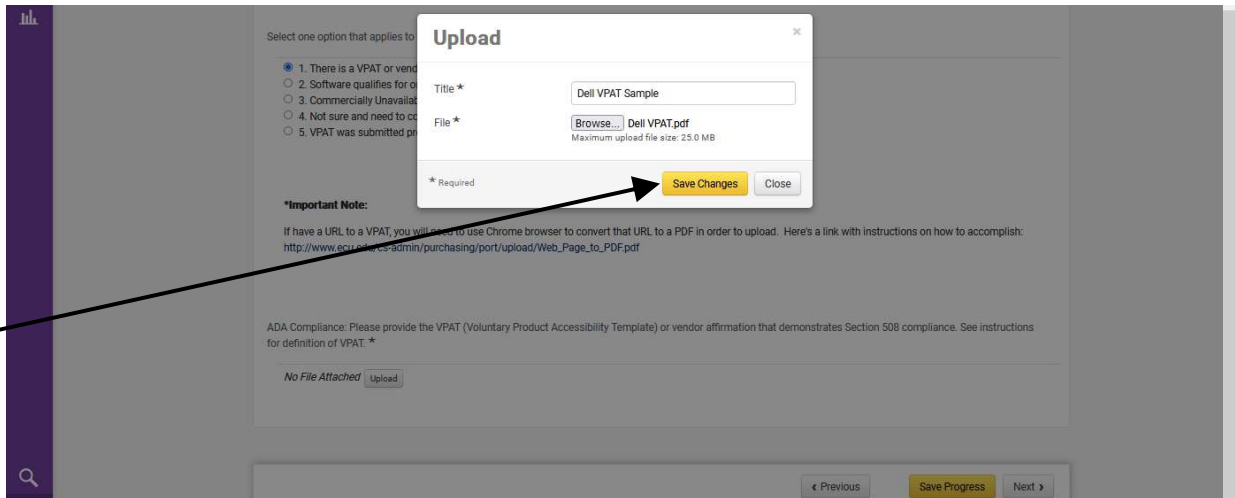


TECHNOLOGY REQUEST FORM

Last Updated on: 6/29/2022



35. Browse to select the file and click **Open**.



36. Click **Save Changes** button to upload the file.

TECHNOLOGY REQUEST FORM

Last Updated on: 6/29/2022

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 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. *

[Download VPAT Sample](#)

37.

37. 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 49 for adding line items if you only select option 1. Steps 39 – 48 will go through remaining ADA selections.

ECU MATERIALS MANAGEMENT

Search (Alt+Q) 0.00 USD

2. The software qualifies for one of the following exceptions: Back Office, Technical and Programmatic Standards, or Assistive Technology (Software Accessibility Exemption and Exceptions).

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 - Software Accessibility Exemption and Exceptions), 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. 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.

Select the exception for which the software qualifies *

- Back Office
- Programmatic and Technical Academic Standards
- Assistive Technology
- Work Productivity

Enter justification for exception: *

2000 characters remaining

39.

38.

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

39. Open the Accessibility information link for details.

TECHNOLOGY REQUEST FORM

Last Updated on: 6/29/2022

This screenshot shows a section of the form titled "Select one option that applies to your purchase: *". It contains five radio button options. Option 2, "Software qualifies for one of the exceptions identified above," is selected. Below this, there is a section titled "Select the exception for which the software qualifies *" with four radio button options: "Back Office" (selected), "Programmatic and Technical Academic Standards", "Assistive Technology", and "Work Productivity". A text box labeled "Enter justification for exception: *" contains the text "This software qualifies for exception due to ...". At the bottom right, there are three buttons: "Previous", "Save Progress", and "Next".

40. Select an appropriate exception for software purchase and enter your **justification** in the text box provided.

41. Click **Next** to continue to the **Line Item Information** section of the form (step 49).

This screenshot shows a section of the form titled "Review and Submit". It contains detailed information about Section 508 compliance and accessibility. Below this, there is a section titled "Select one option that applies to your purchase: *" with five radio button options. Option 3, "Commercially Unavailable or Fundamental Alteration or does not meet Section 508 requirement," is selected. Below this, there is a section titled "Is there an applicable Exception? (see above list of examples and continue with purchasing process). An IT Accessibility Consultant will contact you. *" with three radio button options: "Commercially Unavailable" (selected), "Fundamental Alteration", and "Does not meet Section 508 requirement". At the bottom right, there are three buttons: "Previous", "Save Progress", and "Next".

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

43. Select the appropriate exception by clicking the corresponding Radio button

Note: By selecting this option an **IT Accessibility Consultant** will review this Technology request and may contact you for additional information.

44. Click **Next** to proceed to the **Line Item Information** section of your form (step 49).

TECHNOLOGY REQUEST FORM

Last Updated on: 6/29/2022

Review and Submit

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 (Voluntary Product Accessibility Template) 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 (Software Accessibility Exemption and Exceptions).
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 – Software Accessibility Exemption and Exceptions), 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. IT Accessibility Consultation.
5. VPAT was submitted previously and the purchaser has confirmed no changes to the VPAT.

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

45.

46.

45. Select option 4 if assistance from an **IT Accessibility Consultant** is necessary.

46. Click **Next** to continue to the **Line Item Information** section of your form (step 49).

ECU MATERIALS MANAGEMENT

Shop Shopping View Forms

Technology Type ✓

Questions ✓

ADA Compliance ⚠

Line Item Information ✓

Additional Line Items ✓

Review and Submit

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 (Voluntary Product Accessibility Template) 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 (Software Accessibility Exemption and Exceptions).
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 – Software Accessibility Exemption and Exceptions), 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. IT Accessibility Consultation.
5. VPAT was submitted previously and the purchaser has confirmed no changes to the VPAT.

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

48.

47.

47. Select option 5 only when the **VPAT** document has previously been submitted and no changes have been verified.

48. Click **Next** to proceed to the **Line Item Information** section of your form.

TECHNOLOGY REQUEST FORM

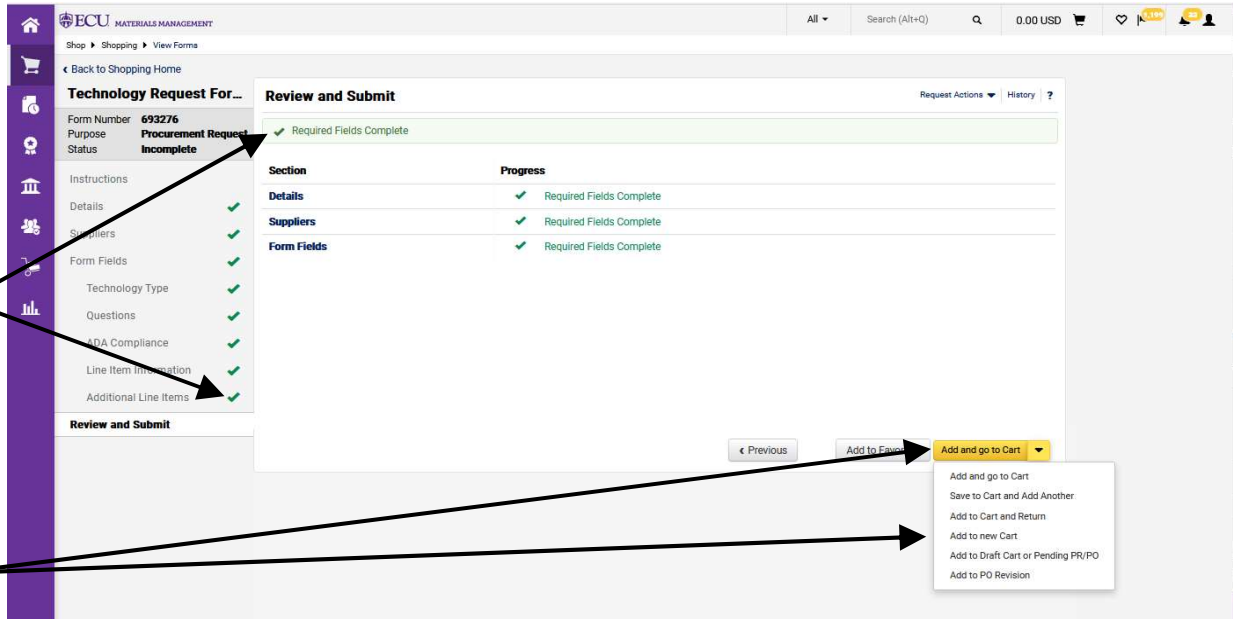
Last Updated on: 6/29/2022

The screenshot shows the 'Form Fields - Line Item Information' section of a web application. On the left, a vertical navigation menu contains icons for home, shopping, forms, details, suppliers, form fields, technology type, questions, and review and submit. The main content area is titled 'Form Fields - Line Item Information' and includes instructions, a 'Line Item Information' section, and a 'Review and Submit' button. Three callout boxes are present: box 49 points to the 'Unit Price' and 'Quantity' fields; box 50 points to the 'Product Description' and 'Catalog No.' fields; and box 51 points to the 'Next' button at the bottom right.

49. In the **Line Item Information** section enter **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**.
50. 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, it is recommended that you complete the remaining steps to add this Technology Request to your shopping cart. Once at the shopping cart, go to the PORT home page and add the remaining items as non-catalog items to your active shopping cart.
51. If you order has between 5 – 10 items, click **Next**. Otherwise, you can click **Review and Submit** section of your form.

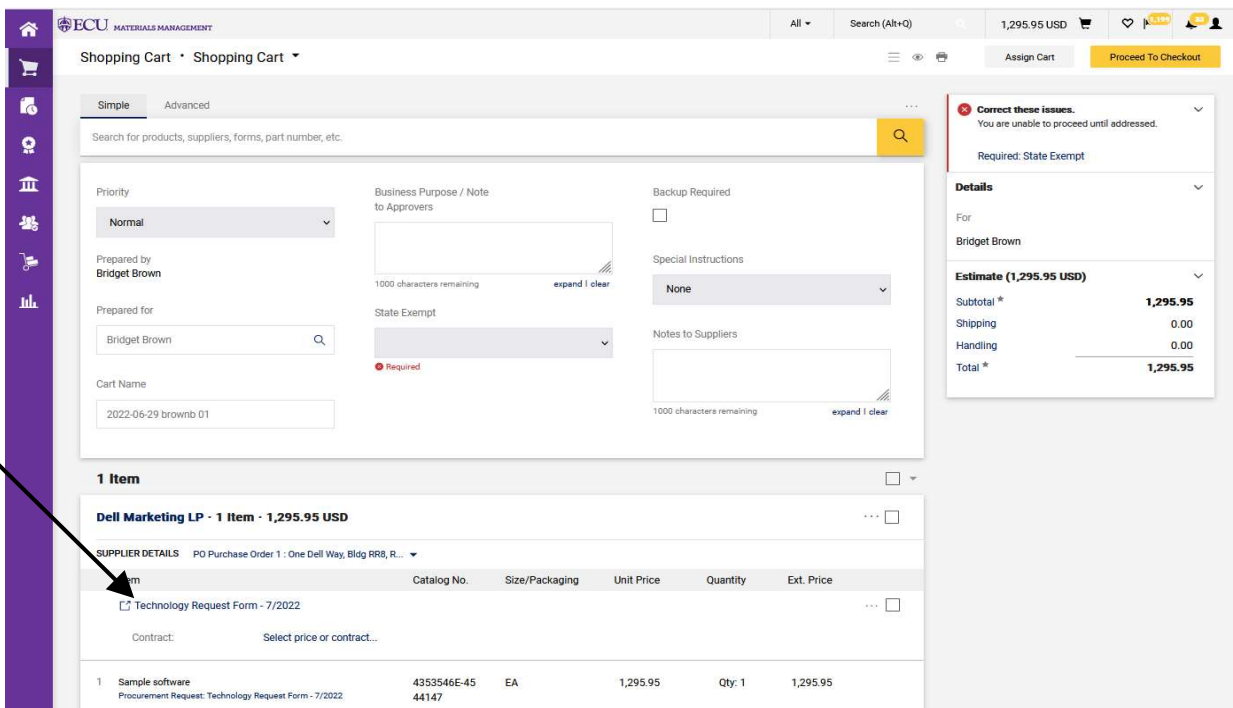
TECHNOLOGY REQUEST FORM

Last Updated on: 6/29/2022



52. 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. 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.

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

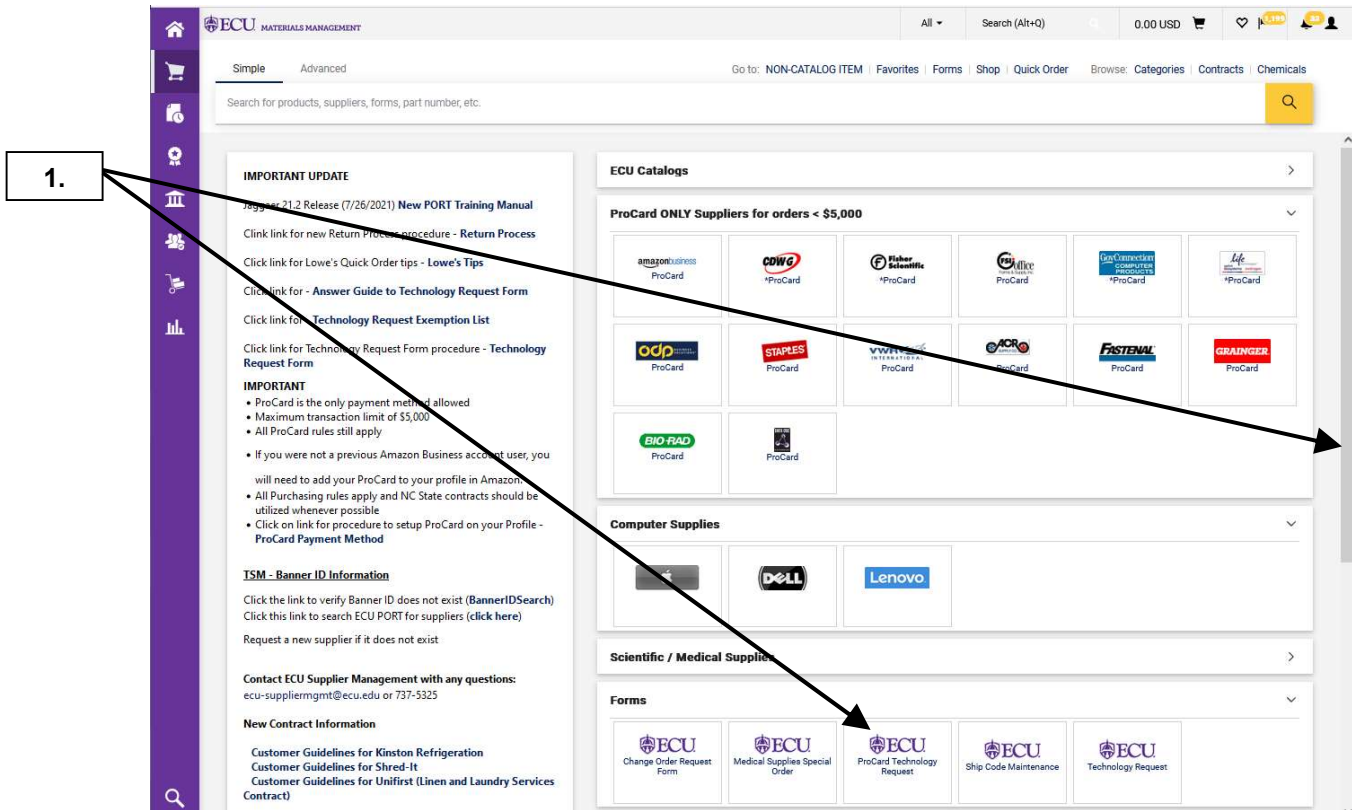


54. Your **Technology Request Form** has now been added to a Cart and is indicated by the **Form Name** and **Form Image Icon**.

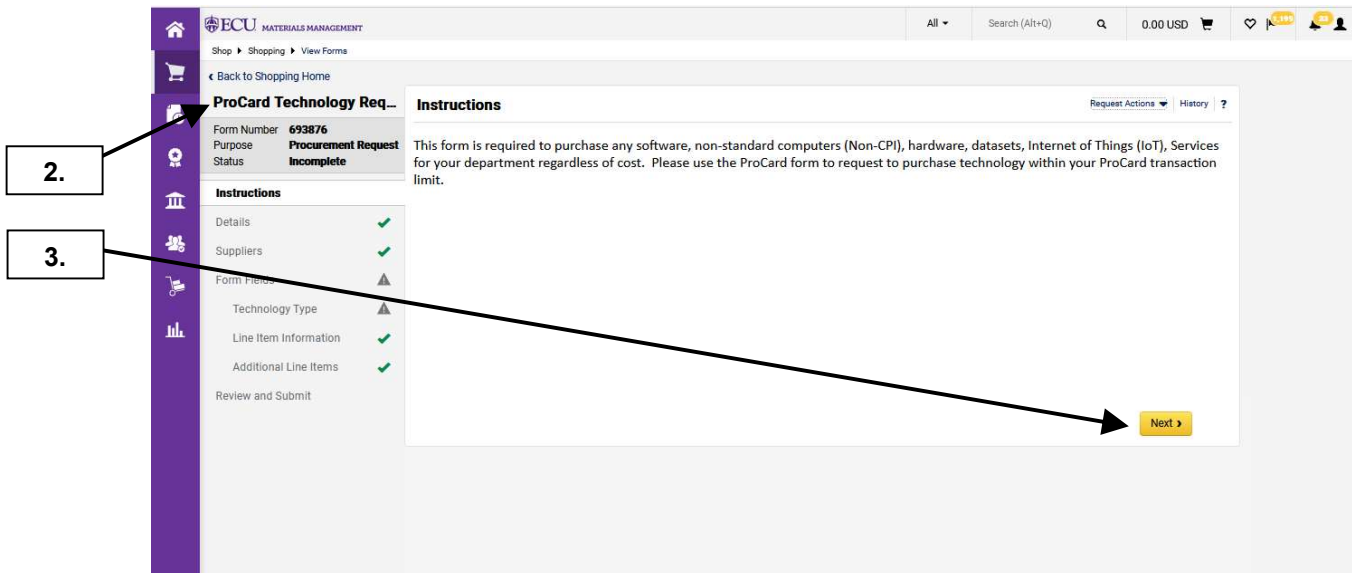
55. See the Edit Cart Header procedure to continue the review process.

PROCARD TECHNOLOGY REQUEST FORM

Last Updated on: 6/30/2022



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: 6/30/2022

ECU MATERIALS MANAGEMENT

Shop > Shopping > View Forms

ProCard Technology Req...

Form Number 693876
Purpose Procurement Request
Status Incomplete

Details

Form Name* ProCard Technology Request Form - 7/2022

Purpose Procurement Request

Template Title ProCard Technology Request Form - 7/2022

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

ProCard Technology Req...

Form Number 693876
Purpose Procurement Request
Status Incomplete

Suppliers

Supplier ECU Materials Management
PO 1: 200 E 1st St, Greenville, North Carolina 27858-4353 United States

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

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: 6/30/2022

The screenshot shows the 'Form Fields - Technology Type' section of the ProCard Technology Request Form. The form is titled 'ProCard Technology Request' and has a form number of 693876. The purpose is 'Procurement Request' and the status is 'Incomplete'. The 'Technology Determination' section contains the following text: 'This Technology Request form is required for the procurement of software, non-standard computers (Non-CPI), hardware, datasets, Internet of Things (IoT), and Services. 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 (Does not contain hardware components)
- Computer (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.

The following link provides a listing of items that do not require Technology Request or ProCard Technology Request forms: [Technology Request Exemption List](#)

The form includes a dropdown menu for 'Type of Technology Request' and a text area for 'Description - Please briefly describe this technology and why it is being purchased.*'. The 'Save Progress' button is highlighted in yellow.

7. Review the information and definitions of the 7 types of technology. Note the new information and quick link to Technology Request Exemption List.
8. Click **Type of Technology Request** drop-down box.

The screenshot shows the 'Form Fields - Technology Type' section of the ProCard Technology Request Form. The form is titled 'ProCard Technology Request' and has a form number of 693876. The purpose is 'Procurement Request' and the status is 'Incomplete'. The 'Technology Determination' section contains the following text: 'This Technology Request form is required for the procurement of software, non-standard computers (Non-CPI), hardware, datasets, Internet of Things (IoT), and Services. 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 (Does not contain hardware components)
- Computer (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.

The following link provides a listing of items that do not require Technology Request or ProCard Technology Request forms: [Technology Request Exemption List](#)

The form includes a dropdown menu for 'Type of Technology Request' and a text area for 'Description - Please briefly describe this technology and why it is being purchased.*'. The 'Save Progress' button is highlighted in yellow.

9. Select the appropriate technology for your request. For this example, we will select **Software**.
10. Provide a brief description of technology and why it is being purchased.
11. Click **Save Progress** button.

PROCARD TECHNOLOGY REQUEST FORM

Last Updated on: 6/30/2022

The screenshot shows the 'ProCard Technology Request' form in the 'Form Fields - Technology Type' section. The sidebar on the left contains a navigation menu with callout 12 pointing to the 'Questions' section and callout 13 pointing to the 'Questions' section in the main content area. The main content area displays the 'Technology Determination' section, which includes a list of technology types and their definitions. A dropdown menu for 'Type of Technology Request' is set to 'Software'.

12. 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.

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

The screenshot shows the 'ProCard Technology Request' form in the 'Form Fields - Questions' section. The sidebar on the left contains a navigation menu with callout 14 pointing to the 'Questions' section, callout 15 pointing to the 'Cardholder Name' field, callout 16 pointing to the 'Name of Vendor' field, and callout 17 pointing to the 'Software Questions' section. The main content area displays the 'Software Questions' section, which includes a list of questions and a form for entering the cardholder name and vendor name. A dropdown menu for 'Approximately how many people will use the software?' is set to '11-99'.

14. 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.

15. Enter **Cardholder Name** (if different than user submitting form request) and **Name of Vendor**.

16. Select the appropriate number of users for each license of the software.

Note: Selecting 11 or more users will require you to answer **ADA questions (Step 28)**.

17. Scroll down the page to continue answer remaining questions.

PROCARD TECHNOLOGY REQUEST FORM

Last Updated on: 6/30/2022

18. Who will use the product? (Check all that apply) *

19. Is this purchase for an academic course? *

20. Where will the software data reside? *

21. Will this application use an email service? *

18. Select **Who will use this product**, check **All that Apply**.
19. Indicate if software is used for academic course. Selecting **Yes** will display conditional field for entering **course ID/name**.
20. 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. In addition, a new conditional question will appear **"Will the application use an email service?"**.
21. Answer the question so ITCS can determine if the software follows best practices and security standards: **Will this application use an email service?** Continue scrolling to answer more questions.

22. Does this product have a Canvas LMS Integration? *

23. Data Use Identification - Classify the type of sensitive data this system will use (see definitions below).

Student Financial Aid (GLBA). Information obtained from students when offering financial aid products and services like loans or financial advice.

Financial Cash Management (Financial Services). Information regarding how monies will be deposited from a supplier to the University.

Protected Health Information (HIPAA). Any information about health status, provision of health care, or payment for health care that is created by a Covered Entity (or Business Associate of a Covered Entity) and can be linked to a specific individual or the information can be used to identify an individual. Information can be in any form - oral, written, or electronic - and may reference past, present, or future (1) physical or mental health conditions or (2) financial information for health care.

Academic (FERPA). Records, files, documents, and other materials containing educational information, PII, or directory information of students maintained by the university or by a person/entity for the university.

Credit Card Numbers (PCI). Any data relating to credit card payments or the storage, processing, or transmission of cardholder data and/or sensitive data. Cardholder data consists of the full primary account number (PAN) and may also appear in the form of the full PAN plus any of the following - cardholder name, expiration date, and/or service code.

Human Subject Research (IRB). Human subject research data can be either medical (clinical) or non-medical (e.g., social science) information containing personally identifiable information (PII). This data may or may not be subject to HIPAA.

SSN/PII (ITPA). Any data that could potentially identify an individual, such as Social Security Number (SSN), driver's license or state identification number, passport number, etc.

Employment (HR). Any data relating to personnel files designated as confidential of current or former employees.

General Data Protection Regulation (GDPR). Information obtained from Individuals within the European Union (EU) or the European Economic Area (EEA).

Internal Data. University owned or managed data that includes information that is not openly shared with the general public but is not specifically required to be protected by statute or regulation. Internal data includes but is not limited to: budget and salary information, personal cell phone numbers, departmental standard operating procedures, internal memos, and incomplete or unpublished research.

Select appropriate option(s) for data: *

22. Indicate if the software has a Canvas LMS integration.
23. **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: 6/30/2022

The screenshot shows the top portion of the ProcCard Technology Request Form. On the left is a purple navigation sidebar with icons for home, shopping, and various forms. The main content area contains the following elements:

- 24.** A checkbox labeled "I certify this is correct" which is checked.
- 25.** A radio button question: "Is this a request to renew an existing technology purchase?*" with "No" selected.
- 26.** A radio button question: "Microsoft Azure SSO (Single Sign On) – Will this technology use ECU Credentials?*" with "No" selected.
- 27.** A radio button question: "Microsoft Azure MFA (Multi-Factor Authentication) – Does this technology support the use of Microsoft Azure MFA...?" with "No" selected.

Below the radio buttons, there are two bolded advisory statements: "It is strongly advised to utilize Microsoft Azure SSO (using ECU Credentials) for any system implementation, unless there are no reasonable alternatives." and "It is strongly advised to utilize Microsoft Azure MFA for any system implementation, unless there are no reasonable alternatives."

- 24. Click the required check box to certify the information provided.
- 25. Click the appropriate radio button to indicate if this will be a renewal of an existing technology purchase.
- 26. Click the appropriate radio button to indicate if technology will use ECU Credentials for Single Sign-On.
- 27. Click the appropriate radio button to indicate if technology supports Multi-Factor Authentication.

The screenshot shows the bottom portion of the ProcCard Technology Request Form, specifically the "1.2 Supplier Question" section. On the left is the same purple navigation sidebar. The main content area contains the following elements:

- 28.** A radio button question: "Is the vendor a foreign supplier?*" with "No" selected.
- 29.** A radio button question: "Is this a purchase of all substantial rights to use the product?" with "No" selected.
- 29.** A text input field for "Is there a server providing the software service? If so, where is the server located?".
- 30.** A text input field for "Is this a payment for the use of a software product?".
- 31.** A radio button question: "Will anyone from abroad come to East Carolina University to install the software?*" with "No" selected.

At the bottom right of the form, there are three buttons: "Previous", "Save Progress", and "Next".

- 28. 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**.
- 29. Provide as much detail about rights, storage location, and product details to avoid delays in processing.
- 30. Indicate whether anyone abroad will come to ECU to install software.
- 31. Click the **Next** button.

PROCARD TECHNOLOGY REQUEST FORM

Last Updated on: 6/30/2022

The screenshot shows the 'ProCard Technology Request' form in the 'ECU MATERIALS MANAGEMENT' system. The form is titled 'Form Fields - ADA Compliance' and includes a sidebar with navigation options: Home, Shopping, View Forms, Back to Shopping Home, ProCard Technology Req., Form Number 693876, Purpose Procurement Request, Status Incomplete, Instructions, Details, Suppliers, Form Fields, Technology Type, Questions, ADA Compliance, and Additional Line Items. The main content area is divided into sections: 'Instructions' with the text 'To avoid delays in processing, please read all instructions carefully', and 'Accessibility Section' with 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.' Arrows from callout boxes 32 and 33 point to the 'ADA Compliance' sidebar item and the 'Accessibility Section' text, respectively.

- 32. If 11 or more users was selected in **Step 16** then the **ADA Compliance** section was triggered, and responses will be required to complete the form.
- 33. 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 continuation of the 'ProCard Technology Request' form. It displays a list of options for ensuring Section 508 compliance and accessibility. 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. Arrows from callout boxes 34, 35, and 36 point to the first option, the second option, and the fourth option, respectively. At the bottom of the form, there are buttons for '< Previous', 'Save Progress', and 'Next >'.

- 34. A brief description of **Voluntary Product Accessibility Templates (VPATs)** with links containing more details have been provided.
- 35. This link provides details regarding requested software that may have exceptions from the VPAT requirement.
- 36. Choosing options 3 or 4 will result in a request for an **IT Accessibility Consultant's** assistance.

PROCARD TECHNOLOGY REQUEST FORM

Last Updated on: 6/30/2022

The screenshot shows the 'PROCARD TECHNOLOGY REQUEST FORM' interface. At the top, it says 'ECU MATERIALS MANAGEMENT' and 'Shop > Shopping > View Forms'. The main content area has a heading 'Select one option that applies to your purchase.*' followed by five radio button options. Option 1 is selected. 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'. At the bottom of the form, there is a text input field with 'No File Attached' and an 'Upload' button. Navigation buttons for '< Previous', 'Save Progress', and 'Next >' are at the bottom right.

37.

38.

37. 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.
38. Once the VPAT document is obtained, upload the file from the supplier by clicking the **Upload** button.

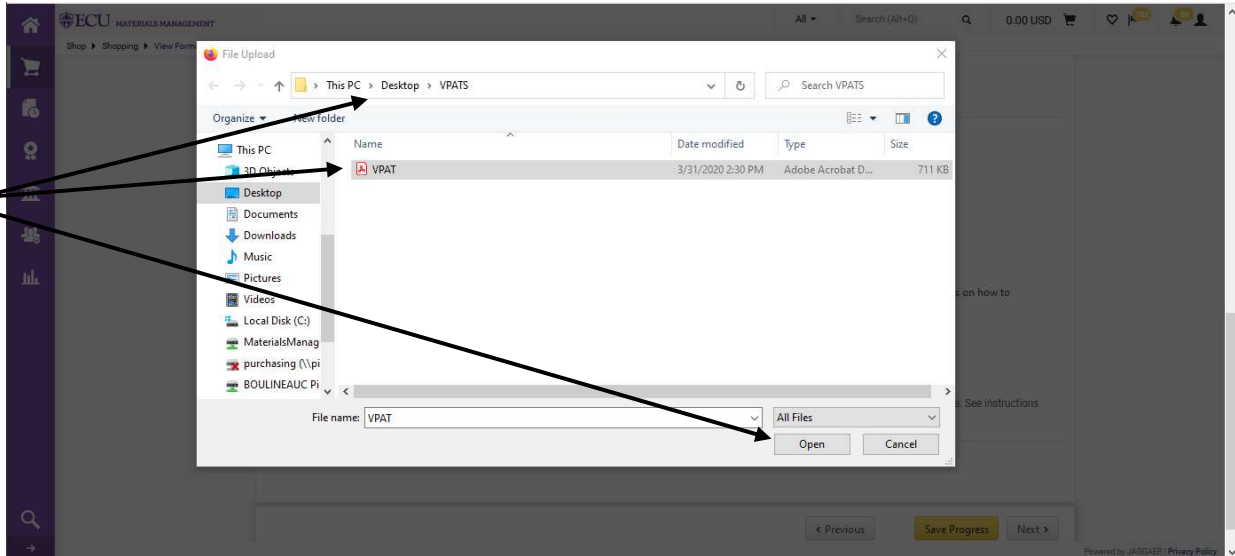
This screenshot shows the same form as above, but with an 'Upload' dialog box open in the foreground. The dialog box has a title bar 'Upload' and a close button. It contains a 'Title *' field with 'VPAT Sample' entered, and a 'File *' field with a 'Browse...' button and the text 'No file selected. Maximum upload file size: 25.0 MB'. There are 'Save Changes' and 'Close' buttons at the bottom of the dialog. In the background, the form shows option 1 selected and the 'Upload' button on the main form is highlighted.

39.

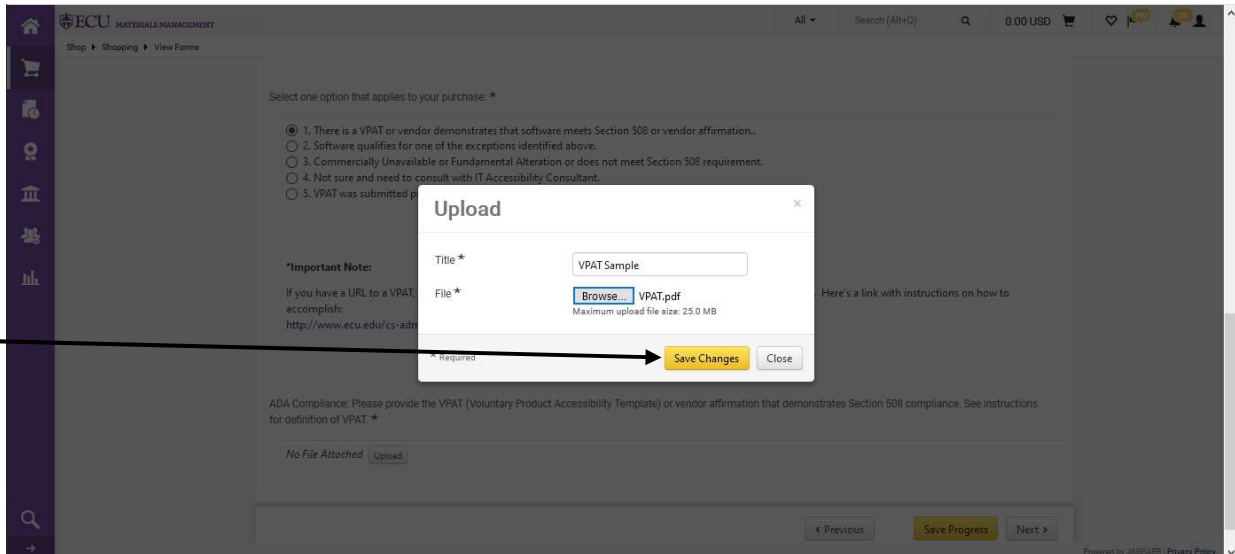
39. Name your upload file appropriately and click **Browse** button to find your file.

PROCARD TECHNOLOGY REQUEST FORM

Last Updated on: 6/30/2022



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



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

PROCARD TECHNOLOGY REQUEST FORM

Last Updated on: 6/30/2022

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/eas/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

42. 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 39 – 48).

43. For this example, we will proceed to entering **Line Item Information** by clicking **Next** button.

ProCard Technology Req... Form Fields - Line Item Information

Form Number 693876
Purpose Procurement Request
Status Incomplete

Instructions

- Please fill out ALL fields for each individual line item.
- Please include product name and version number or your order could be delayed.
- Information input here will appear on your requisition.
- You may list additional items on the next page.
- If you have more than 10 line items you may add more than one Software Form to your cart.

Line Item Information

Item 1

Unit Price	79.95	USD	Quantity	11	Total	0.00 USD
Unit of Measure	EA - Each					
Product Description	Adobe Acrobat Professional					
Catalog No.	4325332532525					

Item 2

Unit Price		USD	Quantity		Total	0.00 USD
Unit of Measure	EA - Each					
Product Description						
Catalog No.						

Review and Submit

Previous Save Progress Next

44. In the **Line Item Information** section, enter **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**.

45. 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, it is recommended that you complete the remaining steps to add this ProCard Technology Request to your shopping cart. Once at the shopping cart, go to the PORT home page and add the remaining items as non-catalog items to your active shopping cart.

46. Click **Save Progress** button on your last item enter.

47. 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: 6/30/2022

Section	Progress
Details	✓ Required Fields Complete
Suppliers	✓ Required Fields Complete
Form Fields	✓ Required Fields Complete

Navigation buttons: < Previous, Add to Favourites, Add and go to Cart (dropdown)

Dropdown menu options:
Add and go to Cart
Save to Cart and Add Another
Add to Cart and Return
Add to new Cart
Add to Draft Cart or Pending PR/PO
Add to PO Revision

48. 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. The 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. **Important Note:** Selecting the action **Add to new Cart** if your active cart has another form type or items from another supplier.
49. **Add and go to Cart** is the default selection and we will click this option to proceed with your purchase request.

PROCARD TECHNOLOGY REQUEST FORM

Last Updated on: 6/30/2022

The screenshot shows the ECU Materials Management shopping cart interface. The cart contains 11 items, including a ProCard Technology Request Form. A callout box labeled '47.' points to the 'Form Name' and 'Form Image' icon in the item list.

Shopping Cart · Shopping Cart

Simple Advanced

Search for products, suppliers, forms, part number, etc.

Priority: Normal

Business Purpose / Note to Approvers: [Text Area]

Backup Required:

Prepared by: Bridget Brown

Special Instructions: None

Prepared for: Bridget Brown

State Exempt: [Dropdown]

Notes to Suppliers: [Text Area]

Cart Name: 2022-06-30 brownb 01

11 Items

ECU Materials Management · 11 Items · 879.45 USD

SUPPLIER DETAILS PO 1 : 200 E 1st St, Greenville, North Carolina 27858-4353 United States

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
ProCard Technology Request Form - 7/2022					
Contract:					
1 Adobe Acrobat Professional Procurement Request: ProCard Technology Request Form - 7/2022	4325353253 2525	EA	79.95	Qty: 11	879.45

Details

For: Bridget Brown

Estimate (879.45 USD)

Subtotal * 879.45

Shipping 0.00

Handling 0.00

Total * 879.45

47.

50. Your **ProCard Technology Request Form** has now been added to a cart and is indicated by the **Form Name** and **Form Image** icon.
51. See the Edit Cart Header procedure to continue the review process

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.

SHOPPING CART – SPECIAL ORDERS FORM

Last Updated on: 11/4/2022

The screenshot displays the ECU Materials Management website. The top navigation bar includes the ECU logo, user account information, and a search bar. The main content area is divided into several sections:

- IMPORTANT UPDATE:** Contains links for Jaggaer 21.2 Release (7/26/2021) New PORT Training Manual, Return Process, Lowe's Quick Order tips, Technology Request Form, and Technology Request Exemption List.
- IMPORTANT:** Lists ProCard as the only payment method, a \$5,000 transaction limit, and instructions for Amazon Business users.
- TSM - Banner ID Information:** Provides links to verify Banner ID and search ECU PORT for suppliers.
- Contact ECU Supplier Management:** Lists contact information: ecu-suppliermgmt@ecu.edu or 737-5325.
- New Contract Information:** Lists guidelines for Kinston Refrigeration, Shred-It, and Unifirst Linen and Laundry Services.
- ECU Catalogs:** A dropdown menu showing various ProCard suppliers for orders under \$5,000, including Amazon Business, CDWG, Fisher Scientific, Millie, CityConnect, Life, ODP, Staples, VWR, ACR, Fistulal, and Grainger.
- Computer Supplies:** A dropdown menu showing Apple, Dell, and Lenovo.
- Scientific / Medical Supplies:** A dropdown menu showing various forms, including the **Medical Supplies Special Order** form, which is highlighted by a red box and an arrow from a callout box labeled '1.'

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

SHOPPING CART – SPECIAL ORDERS FORM

Last Updated on: 11/4/2022

The screenshot shows a web form titled "Medical Supplies Special Orders" within the "ECU MATERIALS MANAGEMENT" system. The form includes a top navigation bar with a search function and a currency set to USD. The main content area is divided into sections: "General Info" and "Non-Configurable Fields". The "Non-Configurable Fields" section contains several input fields: "Form Type" (Medical Supplies Special Orders), "Catalog No." (4567644), "Product Description" (3M n95 Particulate Respirator), "Quantity" (4), "UOM" (EA - Each), and "Estimated Price" (29.95). A "View Legacy Form" button is located at the bottom of the form. A yellow "Add And Go To Cart" button is positioned in the top right corner. Two callout boxes are present: box 2 points to the "Catalog No.", "Product Description", "Quantity", and "UOM" fields; box 3 points to the "Add And Go To Cart" button.

2. 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
3. Click on **Add And Go To Cart** button to add the item to an active cart.

SHOPPING CART – SPECIAL ORDERS FORM

Last Updated on: 11/4/2022

Shopping Cart • Shopping Cart

Simple | Advanced

Search for products, suppliers, forms, part number, etc.

Priority: Normal

Business Purpose / Note to Approvers: [Text Field]

Backup Required:

Special Instructions: None

Notes to Suppliers: [Text Field]

Prepared by: Bridget Brown

Prepared for: Bridget Brown

State Exempt: [Text Field] Required

Cart Name: 2022-07-13 brownb 03

4 Items

ECU Medical Storeroom - 4 Items - 119.80 USD

SUPPLIER DETAILS: Medical Supplies : 600 Moye Blvd, Brody Som Gw...

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 3M n95 Particulate Respirator	4567644	EA	29.95	Qty. 4 EA	119.80

ITEM DETAILS: Contract:

Correct these issues. You are unable to proceed until addressed. Required: State Exempt

Details: For Bridget Brown

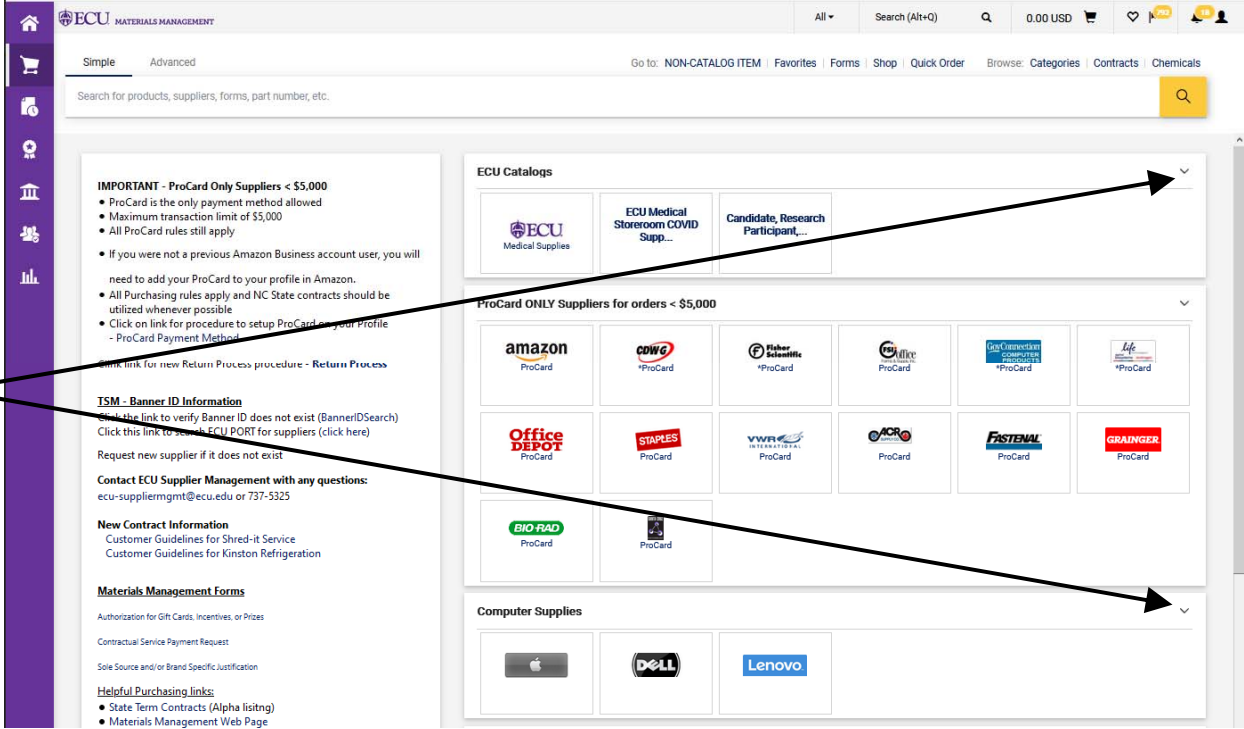
Estimate (119.80 USD)

Subtotal *	119.80
Shipping	0.00
Handling	0.00
Total *	119.80

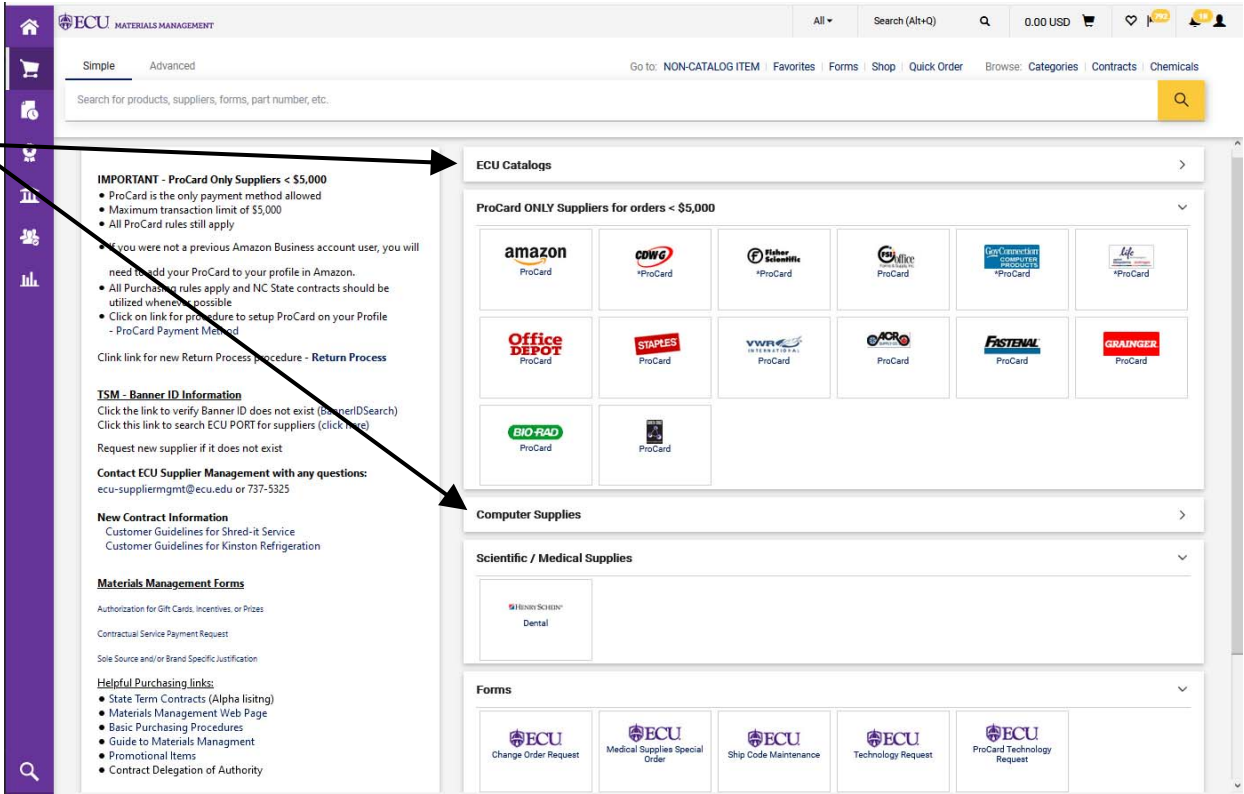
4. This brings you to **Shopping Cart** edit section. See the **Edit Cart Header** procedure to continue the review process.

COLLAPSE PRODUCT SHOWCASE

Last Updated on: 5/20/2021



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



2. Notice that ECU Catalogs and Computer Supplies showcases collapsed.

COLLAPSE PRODUCT SHOWCASE

Last Updated on: 5/20/2021

5. Home icon in the sidebar.

4. Right-pointing arrow of the collapsed 'ProCard ONLY Suppliers' showcase.

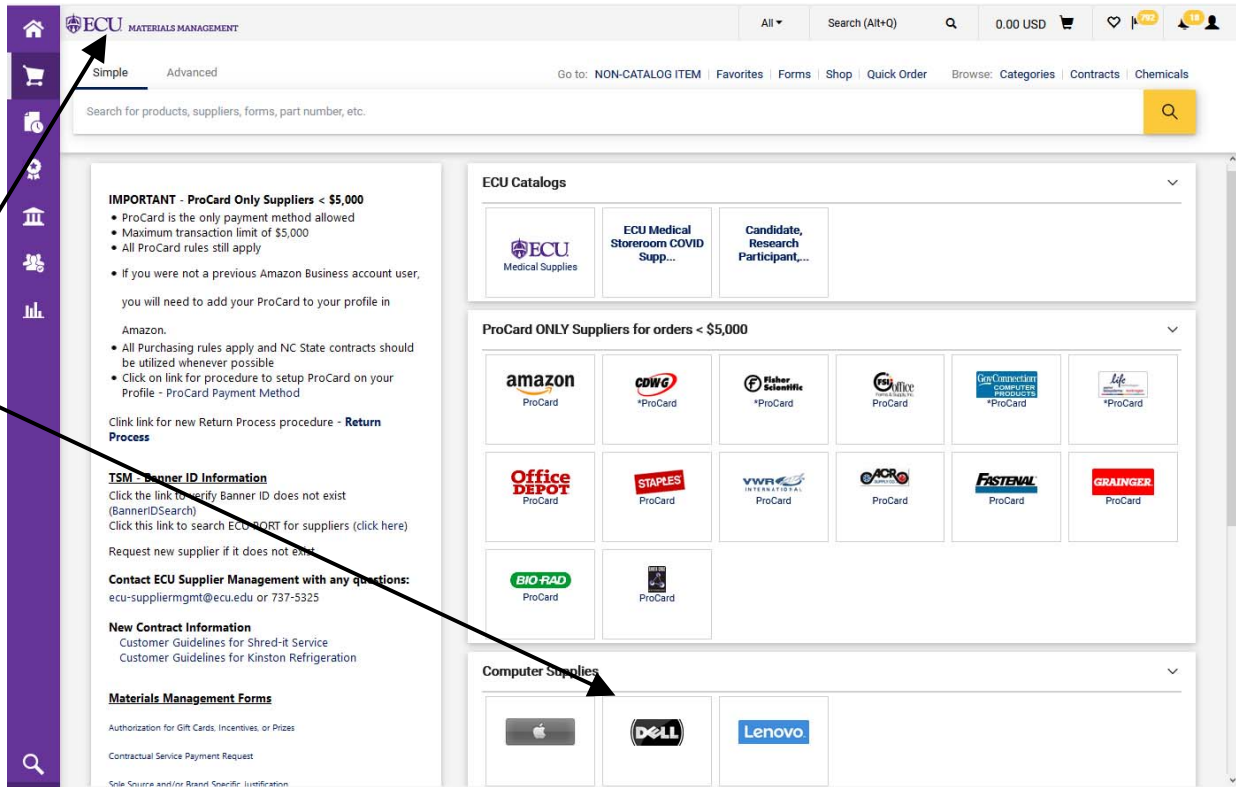
3. 'Materials Management Forms' section in the main content area.

The screenshot shows the ECU Materials Management website. The top navigation bar includes the ECU logo, 'MATERIALS MANAGEMENT', and search options. The main content area is divided into a left sidebar and a main content area. The main content area features a search bar and a list of collapsed showcases. The first showcase is expanded, showing text and links. The other showcases are collapsed, showing only their category names and a right-pointing arrow.

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

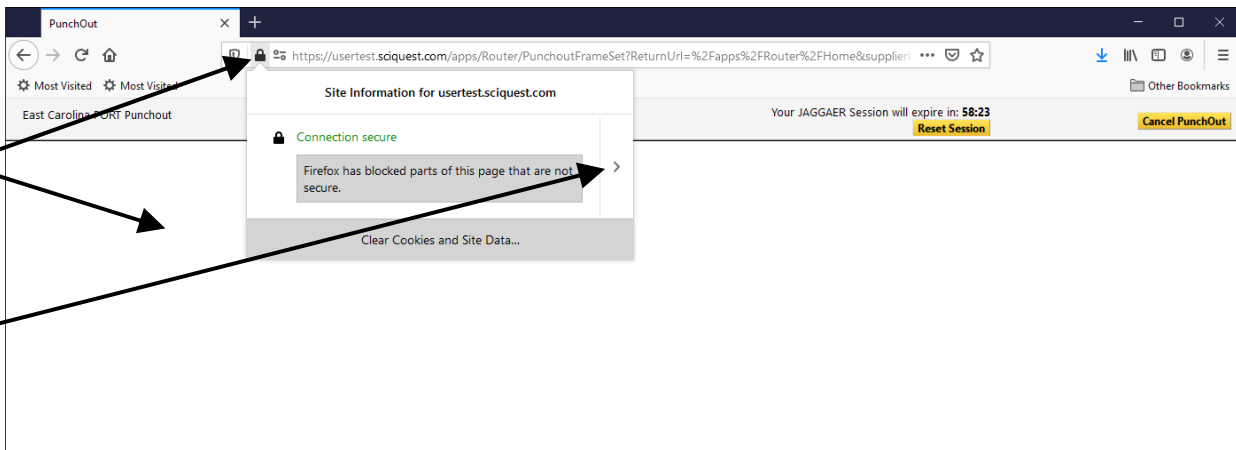
Last Updated on: 7/20/2021



1.

2.

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.



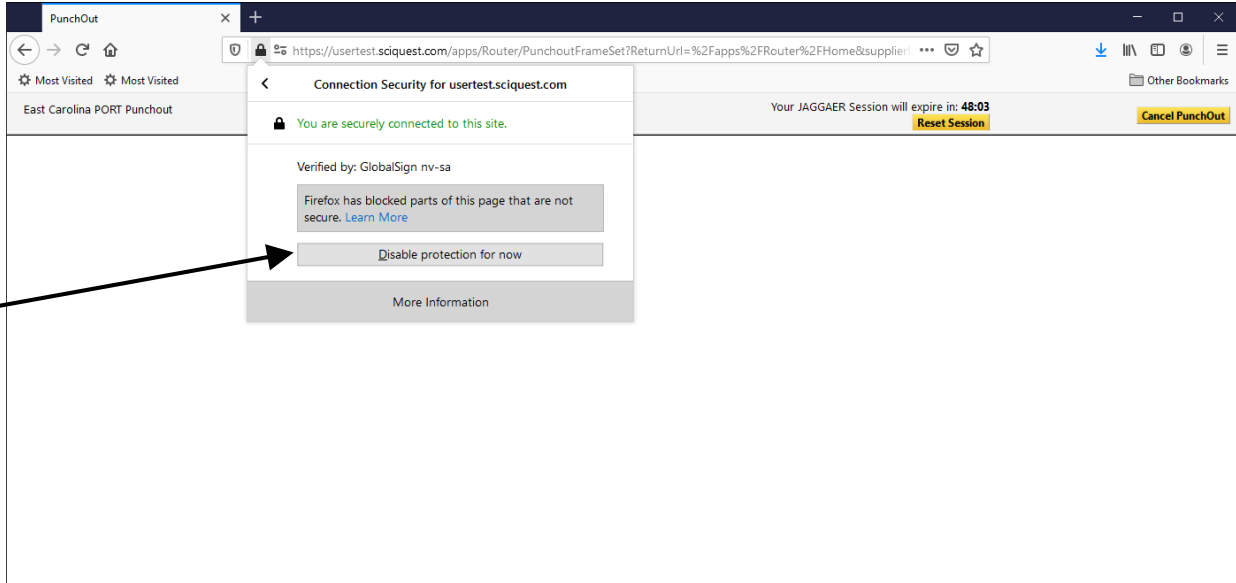
3.

4.

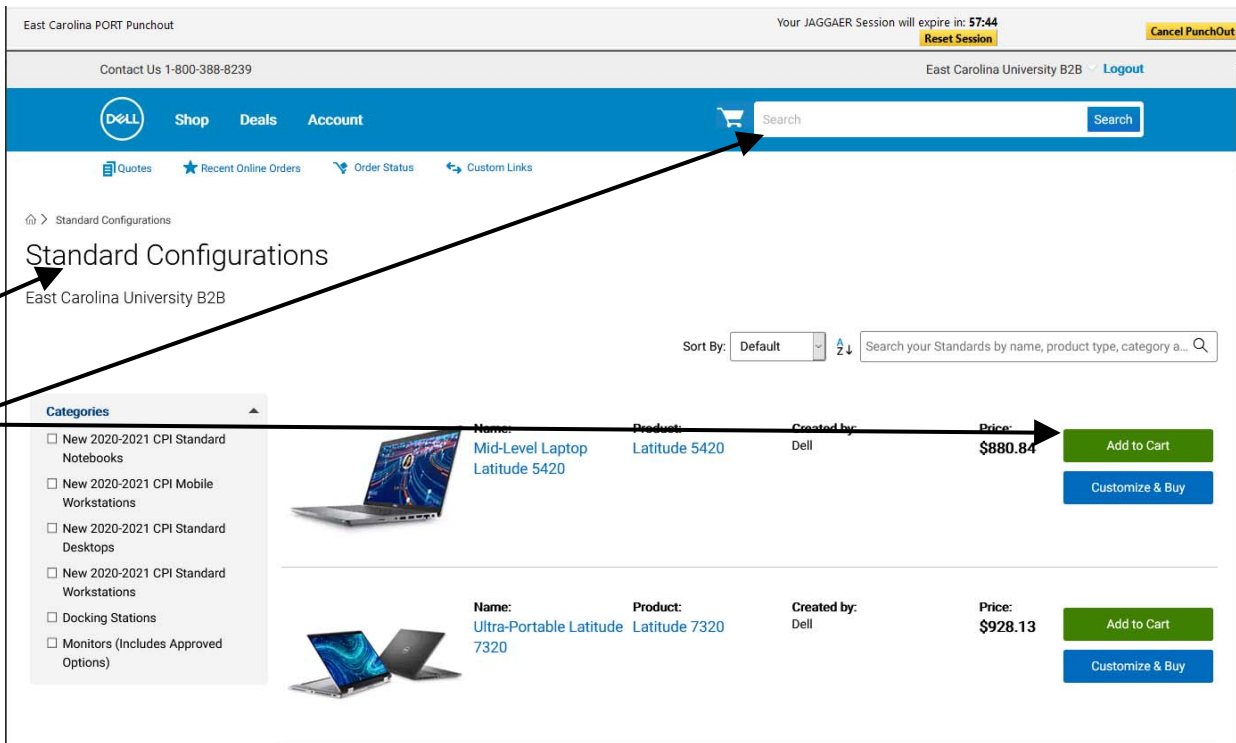
3. If you see a blank white page when punching out to Dell, click on the lock to correct this issue. **Note:** This issue only impacts Dell and Firefox is the preferred browser for accessing Dell punch-out catalog.
4. Click on the arrow to allow secure and unsecured content.

SHOPPING CART – PUNCHOUT CATALOG

Last Updated on: 7/20/2021



5. Click **Disable protection for now** button to correct this issue with catalog content not displaying.



6. 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, Lenovo, or Apple standard configuration computers with ECU image.

7. For the 1st item, we will add a Mid-Level Laptop Latitude 5420 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: 7/20/2021

This screenshot shows the Dell Punchout Catalog interface. At the top, there is a navigation bar with the Dell logo, 'Shop', 'Deals', and 'Account' links. A search bar is located on the right. Below the navigation bar, there are links for 'Quotes', 'Recent Online Orders', 'Order Status', and 'Custom Links'. The main content area is titled 'Standard Configurations' and 'East Carolina University B2B'. A 'Categories' sidebar on the left lists various product types. The main product list displays two items: a 'Mid-Level Laptop Latitude 5420' priced at \$880.84 and an 'Ultra-Portable Latitude 7320' priced at \$928.13. Each item has an 'Add to Cart' button and a 'Customize & Buy' button. A shopping cart icon in the top right corner shows a count of 1. A box labeled '8.' has arrows pointing to the 'Add to Cart' button of the first item and the shopping cart icon.

Name	Product	Created by	Price	Actions
Mid-Level Laptop Latitude 5420	Latitude 5420	Dell	\$880.84	✓ Added to cart Add to Cart Customize & Buy
Ultra-Portable Latitude 7320	Latitude 7320	Dell	\$928.13	Add to Cart Customize & Buy

8. Notice **Added to cart** and shopping cart update. In this example, we will add more items to our shopping cart. If you only need this one item, you would click on **shopping cart** to begin checkout.

This screenshot is identical to the one above, showing the Dell Punchout Catalog interface with the same product listings. A box labeled '9.' has an arrow pointing to the shopping cart icon in the top right corner.

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

SHOPPING CART – PUNCHOUT CATALOG

Last Updated on: 7/20/2021

East Carolina PORT Punchout | Your JAGGAER Session will expire in: 43:56 | [Reset Session](#) | [Cancel PunchOut](#)

Sort By: Default | Search your Standards by name, product type, category an...

Name	Product	Created by	Price	Buttons
23" Monitor P2319H with 3 year support	P2319H Monitor	Dell	\$174.19	Add to Cart Customize & Buy
23" Monitor P2319H with 4 year support	P2319H Monitor	Dell	\$186.92	Add to Cart Customize & Buy
24" Monitor P2419H with 3 year support	P2419H Monitor	Dell	\$187.59	Add to Cart Customize & Buy

10. For the 2nd item, click on **Add to Cart** button for 24" monitor to go with the 3rd item.

East Carolina PORT Punchout | Your JAGGAER Session will expire in: 41:19 | [Reset Session](#) | [Cancel PunchOut](#)

Sort By: Default | Search your Standards by name, product type, category an...

Name	Product	Created by	Price	Buttons
23" Monitor P2319H with 3 year support	P2319H Monitor	Dell	\$174.19	Add to Cart Customize & Buy
23" Monitor P2319H with 4 year support	P2319H Monitor	Dell	\$186.92	Add to Cart Customize & Buy
24" Monitor P2419H with 3 year support	P2419H Monitor	Dell	\$187.59	<input checked="" type="checkbox"/> Added to cart Add to Cart Customize & Buy

11. Notice that the monitor was added to your cart. Scroll to find the 3rd item, a desktop computer.

SHOPPING CART – PUNCHOUT CATALOG

Last Updated on: 7/20/2021

East Carolina PORT Punchout | Your JAGGAER Session will expire in: 56:48 | [Reset Session](#) | [Cancel PunchOut](#)

Sort By: Default | Search your Standards by name, product type, category an... C

Name	Product	Created by	Price	Buttons
Mobile Precision 5750	Precision 5750 Workstation	Dell	\$2,872.68	Add to Cart Customize & Buy
Basic - Mid-Level Desktop - Optiplex 5080 Micro	OptiPlex 5080 Micro From Factor	Dell	\$574.48	Add to Cart Customize & Buy
Basic - Mid-Level Desktop - Optiplex 5080 Small Form Factor	OptiPlex 5080 Tower and Small Form Factor	Dell	\$786.18	✓ Added to cart Add to Cart Customize & Buy
Basic - Mid-Level Desktop - Optiplex 5080 Tower	OptiPlex 5080 Tower From Factor	Dell	\$792.28	Add to Cart Customize & Buy

12. For the 3rd item, click on **Add to Cart** button for Optiplex 5080 desktop computer. Notice the **Added to cart** message once again.

13. Scroll to the top of the page since this is our final item for shopping.

East Carolina PORT Punchout | Your JAGGAER Session will expire in: 51:57 | [Reset Session](#) | [Cancel PunchOut](#)

Contact Us 1-800-388-8239 | East Carolina University B2B | [Logout](#)

[Shop](#) | [Deals](#) | [Account](#) | [Search](#)

[Quotes](#) | [Recent Online Orders](#) | [Order Status](#) | [Custom Links](#)

Standard Configurations | East Carolina University B2B

Sort By: Default | Search your Standards by name, product type, category a... Q



Name	Product	Created by	Price	Buttons
Mid-Level Laptop Latitude 5420	Latitude 5420	Dell	\$880.84	✓ Added to cart Add to Cart Customize & Buy
Ultra-Portable Latitude 7320	Latitude 7320	Dell	\$928.13	Add to Cart Customize & Buy

14. Click on the shopping cart to review your order.

SHOPPING CART – PUNCHOUT CATALOG

Last Updated on: 7/20/2021

The screenshot shows a Dell shopping cart page. At the top, it says "East Carolina PORT Punchout" and "Your JAGGAER Session will expire in: 48:57". There are buttons for "Reset Session" and "Cancel PunchOut". The Dell logo is in the top left. The page title is "Cart". Below the title, it shows "Dell Contract Code: C000000009967" and "Customer agreement number: N/A".

Items	Quantity	Unit Price	Item total
 Mid-Level Laptop Latitude 5420 Discounted unit price: \$880.84 Dell Contract Code: C000000009967 Configure Remove item Estimated Ship Date Ships in 38 - 42 business days Premier discount Show full spec	1	\$2,659.99	\$2,659.99
 24" Monitor P2419H with 3 year support Discounted unit price: \$187.59 Dell Contract Code: C000000009967 Configure Remove item Estimated Ship Date May 24, 2021	1	\$299.99	\$299.99

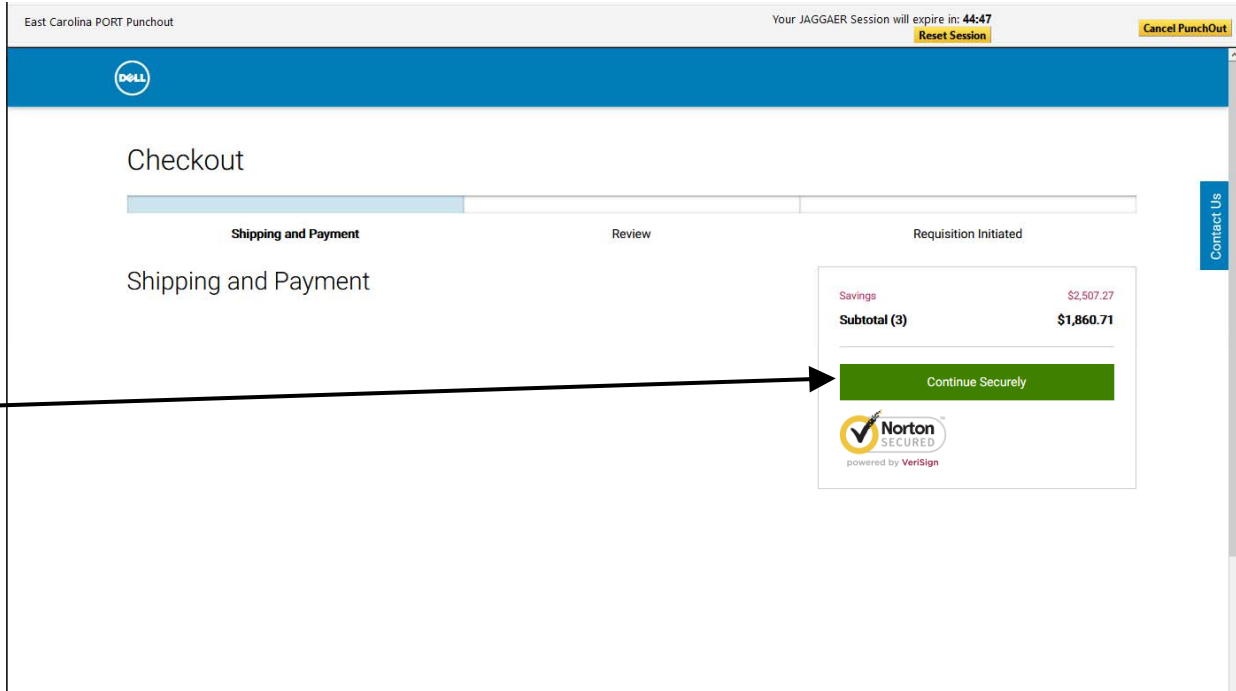
On the right side, there is a summary box with "Savings \$2,507.27" and "Subtotal (3) \$1,860.71". It includes a note: "Price does not reflect applicable shipping, taxes and state environmental fee." Below this are buttons for "Create Order Requisition", "Save as eQuote", and "Continue shopping". There is also a "Print" button and a "Norton SECURED" logo.

Callout boxes are present: **15.** points to the quantity adjustment buttons for the laptop; **16.** points to the bottom of the cart items list; **17.** points to the "Create Order Requisition" button.

- 15.** 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.
- 16.** You may need to scroll down the page to see all the items in your cart.
- 17.** Click **Create Order Requisition** button to continue to checkout.

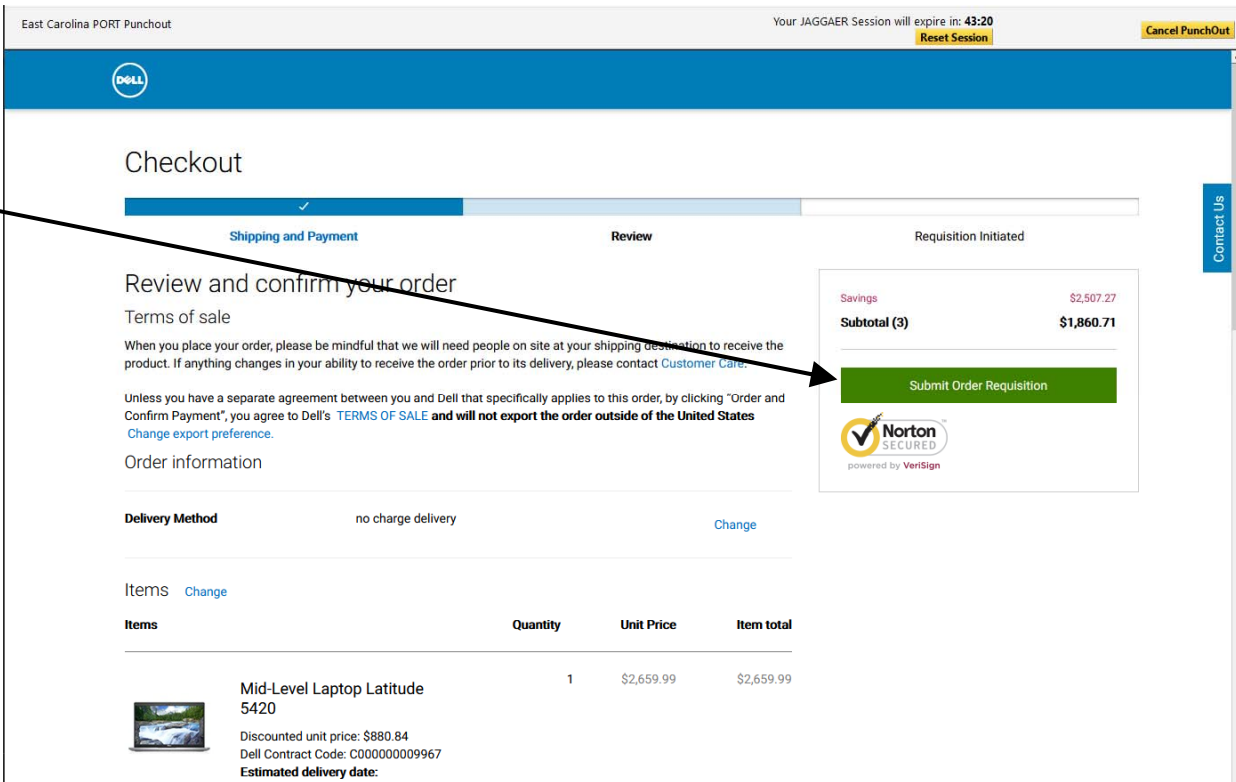
SHOPPING CART – PUNCHOUT CATALOG

Last Updated on: 7/20/2021



18.

18. Click **Continue Securely** button.



19.

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

SHOPPING CART – PUNCHOUT CATALOG

Last Updated on: 7/20/2021

20.

Shopping Cart • 3297451

Correct these issues. You are unable to proceed until addressed. Required: State Exempt

Details
For Bridget Brown
Estimate (1,860.67 USD)
Subtotal 1,860.67
Shipping 0.00
Handling 0.00
Total 1,860.67 USD

4 Items

Dell Marketing LP - 4 Items - 1,860.67 USD

SUPPLIER DETAILS PO Purchase Order 1 : One Dell Way, Bldg RR8, R...

Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on: 7/20/2021 3:11:20 PM

- Base, Dell Latitude 5420 XCTO Base
- OptiPlex 5090 Tower, OptiPlex 5090 Tower XCTO
- Dell 23 Monitor - P2319H; Dell 23 Monitor - P2319H

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 Base, Dell Latitude 5420 XCTO Base	210-AYNM	EA	887.84	1 EA	887.84

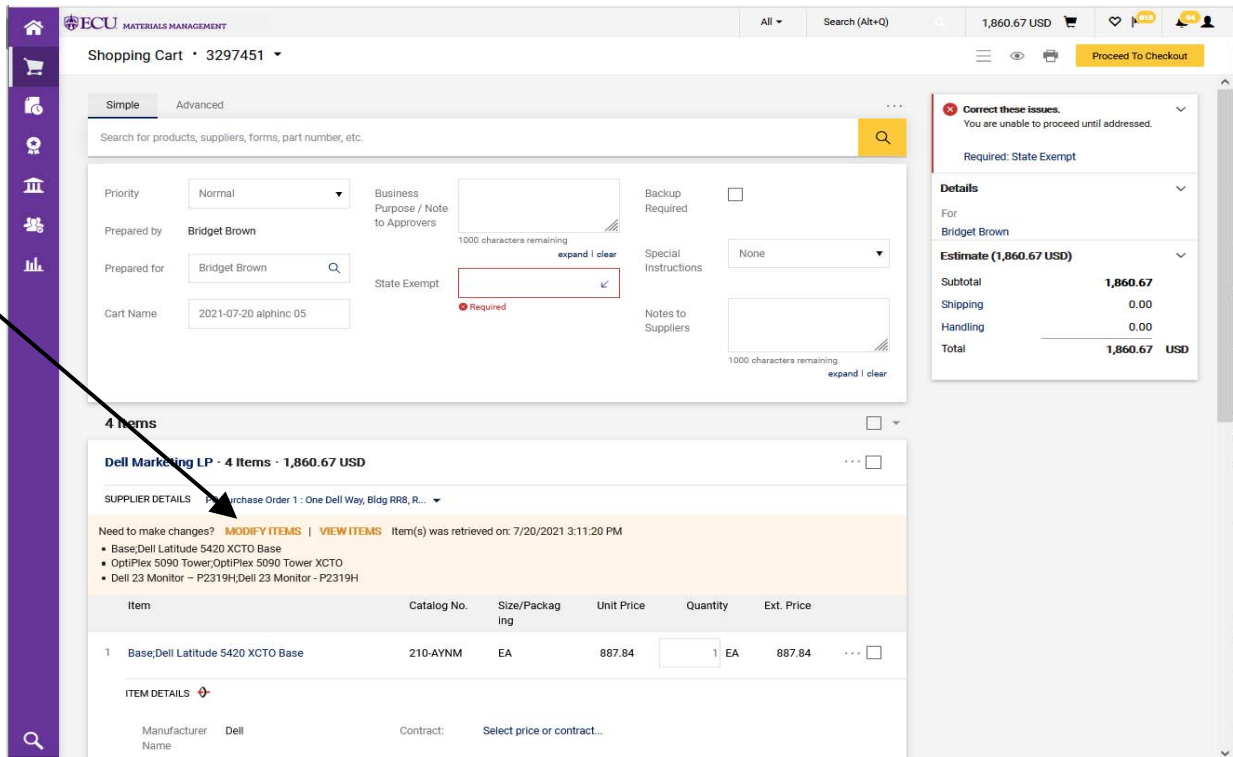
ITEM DETAILS

Manufacturer Name: Dell Contract: Select price or contract...

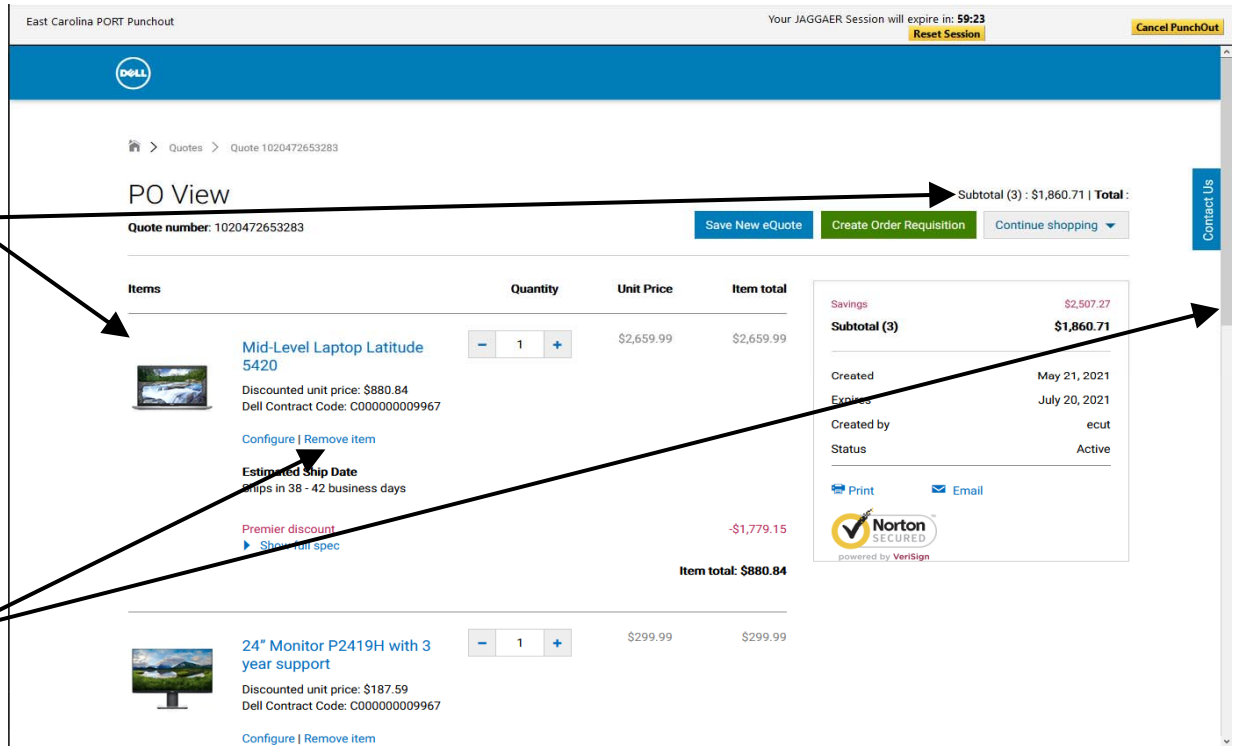
20. This brings you to the **New Shopping Cart** edit section. See the **Edit Cart Header** procedure to continue the review process.

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

Last Updated on: 7/20/2021



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.



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 remove the 1st line item from the shopping cart by clicking **Remove item** link. Scroll down the page to make additional edits to the cart.

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

Last Updated on: 7/20/2021

East Carolina PORT Punchout Your JAGGAER Session will expire in: 52:01 [Reset Session](#) [Cancel PunchOut](#)

PO View

Quote number: 1020472653283 Subtotal (2) : \$979.87 | Total :

[Save New eQuote](#) [Create Order Requisition](#) [Continue shopping](#)

✓ Mid-Level Laptop Latitude 5420 was removed from your cart. ✕

<p>24" Monitor P2419H with 3 year support</p> <p>Discounted unit price: \$187.59 Dell Contract Code: C000000009967</p> <p>Configure Remove item</p> <p>Estimated Ship Date May 24, 2021</p> <p>Premier discount -\$112.40 Show full spec</p> <p style="text-align: right;">Item total: \$187.59</p>	-	1	+	\$299.99	\$299.99
---	---	---	---	----------	----------

<p>Basic - Mid-Level Desktop - Optiplex 5080 Tower</p> <p>Discounted unit price: \$792.28 Dell Contract Code: C000000009967</p> <p>Configure Remove item</p> <p>Estimated Ship Date Ships in 6 - 8 business days</p> <p>Premier discount -\$615.72 Show full spec</p> <p style="text-align: right;">Item total: \$792.28</p>	-	1	+	\$1,408.00	\$1,408.00
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Created: May 21, 2021
Expires: July 20, 2021
Created by: ecut
Status: Active

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Contact Us

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 change the quantity of the 3rd item from 1 to 2 desktop computers by clicking on + sign next to quantity.

East Carolina PORT Punchout Your JAGGAER Session will expire in: 47:52 [Reset Session](#) [Cancel PunchOut](#)

PO View

Quote number: 1020472653283 Subtotal (4) : \$1,959.74 | Total :

[Save New eQuote](#) [Create Order Requisition](#) [Continue shopping](#)

✓ Mid-Level Laptop Latitude 5420 was removed from your cart. ✕

<p>24" Monitor P2419H with 3 year support</p> <p>Discounted unit price: \$187.59 Dell Contract Code: C000000009967</p> <p>Configure Remove item</p> <p>Estimated Ship Date May 24, 2021</p> <p>Premier discount -\$224.80 Show full spec</p> <p style="text-align: right;">Item total: \$375.18</p>	-	2	+	\$299.99	\$599.98
---	---	---	---	----------	----------

<p>Basic - Mid-Level Desktop - Optiplex 5080 Tower</p> <p>Discounted unit price: \$792.28 Dell Contract Code: C000000009967</p> <p>Configure Remove item</p>	-	2	+	\$1,408.00	\$2,816.00
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Created: May 21, 2021
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Contact Us

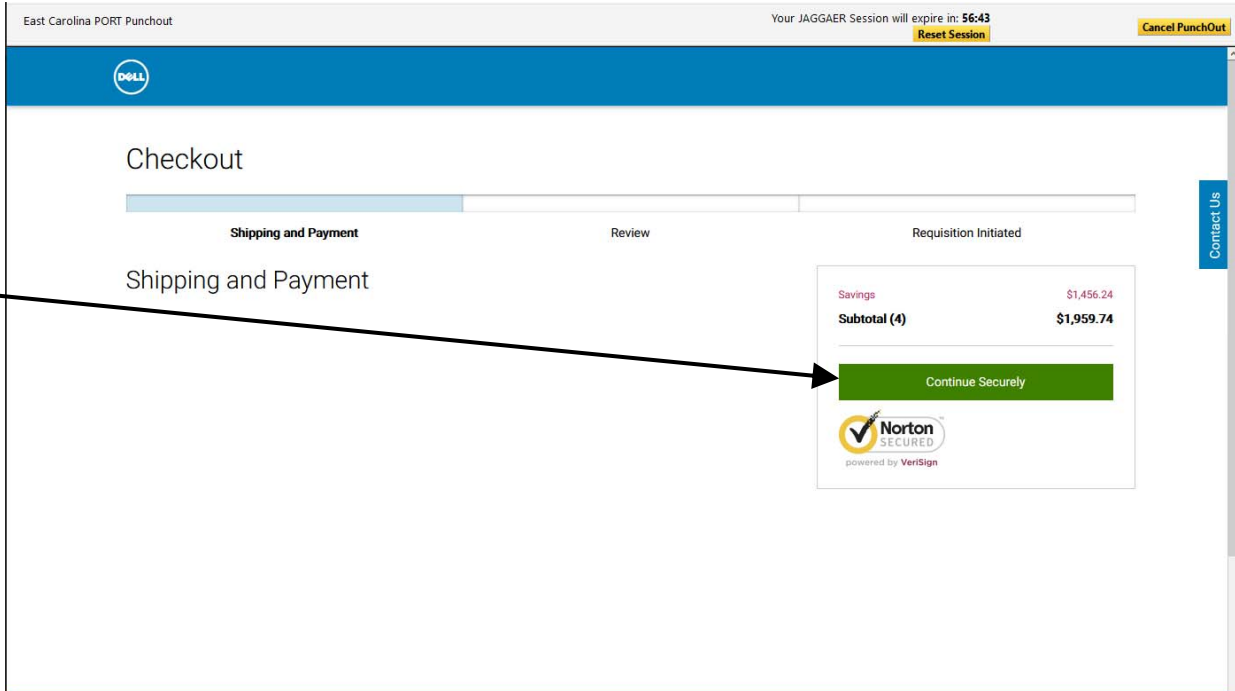
7.

6.

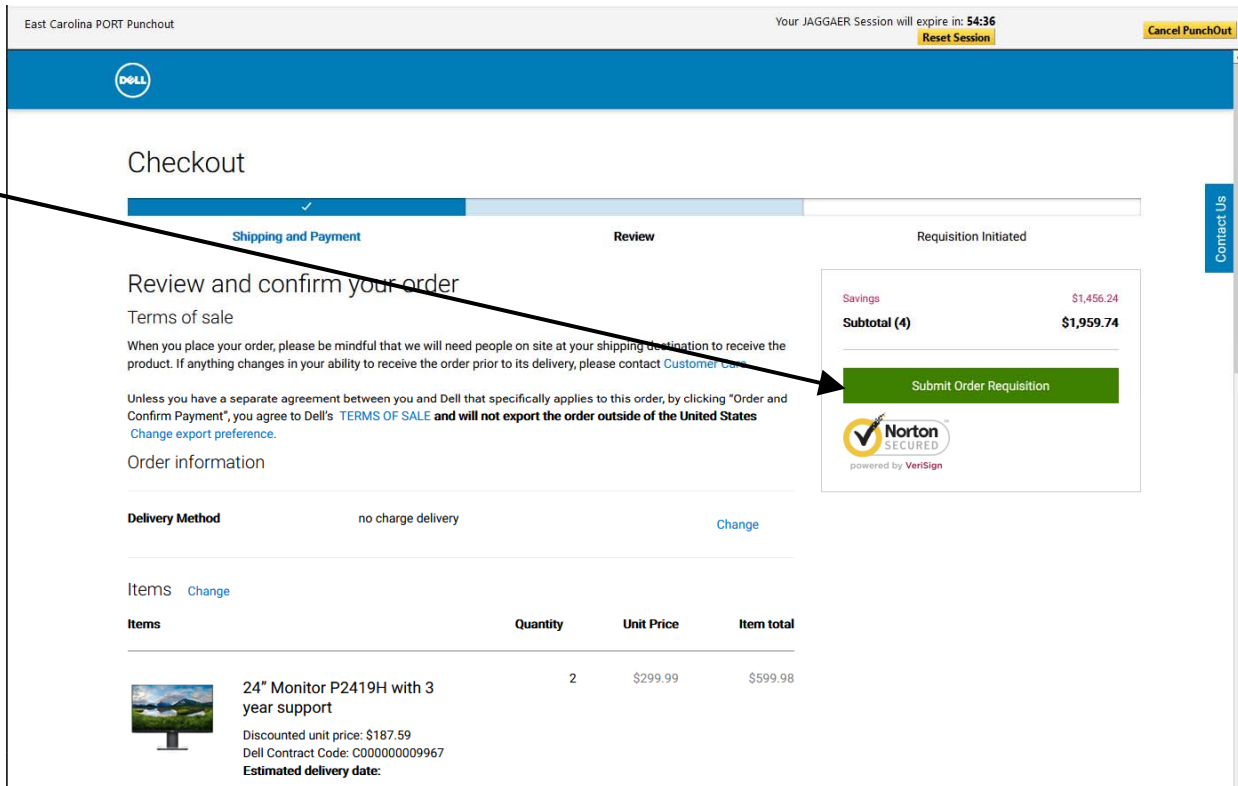
6. Note that 2nd and 3rd item total price updated and 1st item has been removed from the **Shopping Cart**.
7. This completes edits to the shopping cart. Click **Create Order Requisition** button.

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

Last Updated on: 7/20/2021



8. Click on **Continue Securely** button.



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

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

Last Updated on: 7/20/2021

10.

Shopping Cart · 3297667

Simple Advanced

Search for products, suppliers, forms, part number, etc.

Priority: Normal

Prepared by: Bridget Brown

Prepared for: Bridget Brown

Cart Name: 2021-07-20 alphinc 07

Business Purpose / Note to Approvers

State Exempt

Backup Required

Special Instructions: None

Notes to Suppliers

1000 characters remaining expand | clear

1000 characters remaining expand | clear

Correct these issues. You are unable to proceed until addressed.

Required: State Exempt

Details

For: Bridget Brown

Estimate (1,760.75 USD)

Subtotal	1,760.75
Shipping	0.00
Handling	0.00
Total	1,760.75 USD

5 Items

Dell Marketing LP · 5 Items · 1,760.75 USD

SUPPLIER DETAILS PO Purchase Order 1 : One Dell Way, Bldg RR8, R...

Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on: 7/20/2021 4:20:15 PM

- Dell 24 Monitor - P2419H, Dell 24 Monitor - P2419H
- OptiPlex 5090 Tower, OptiPlex 5090 Tower XCTO

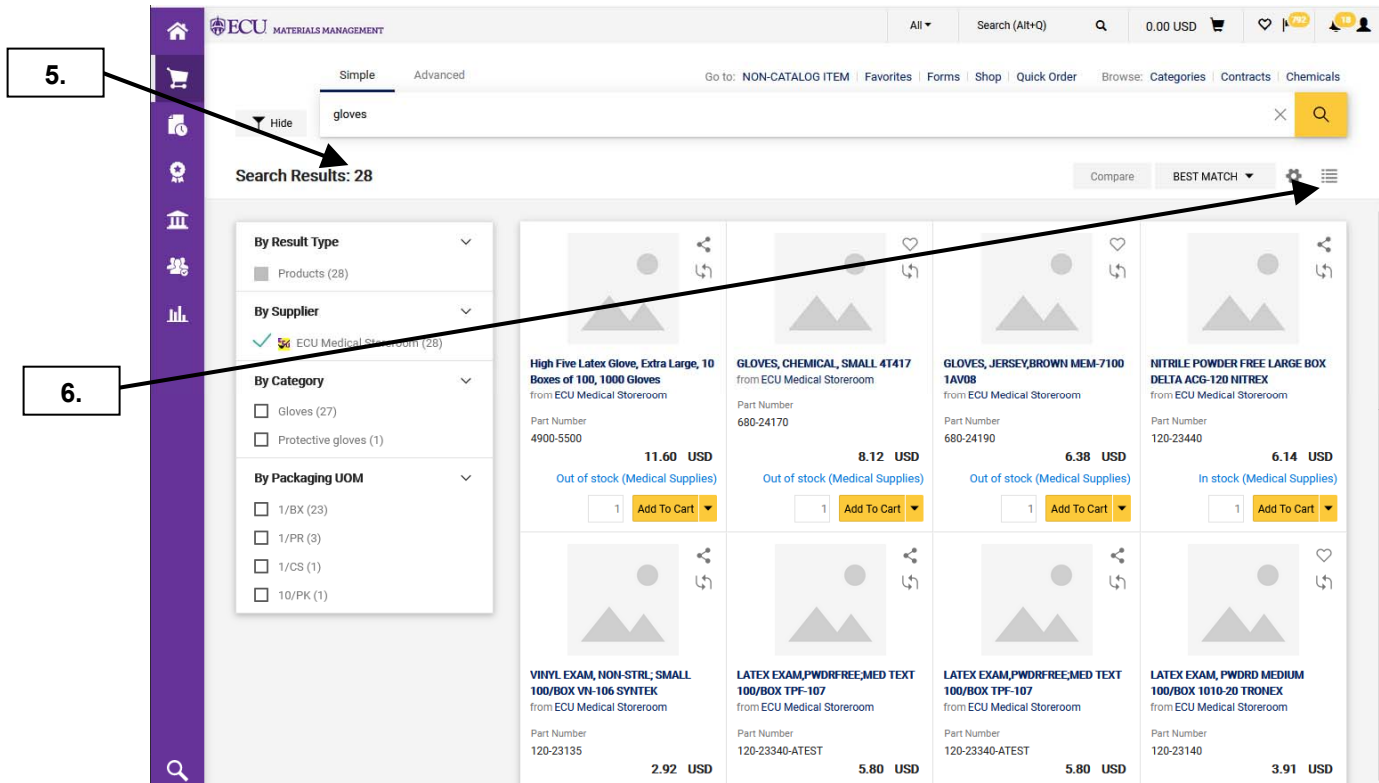
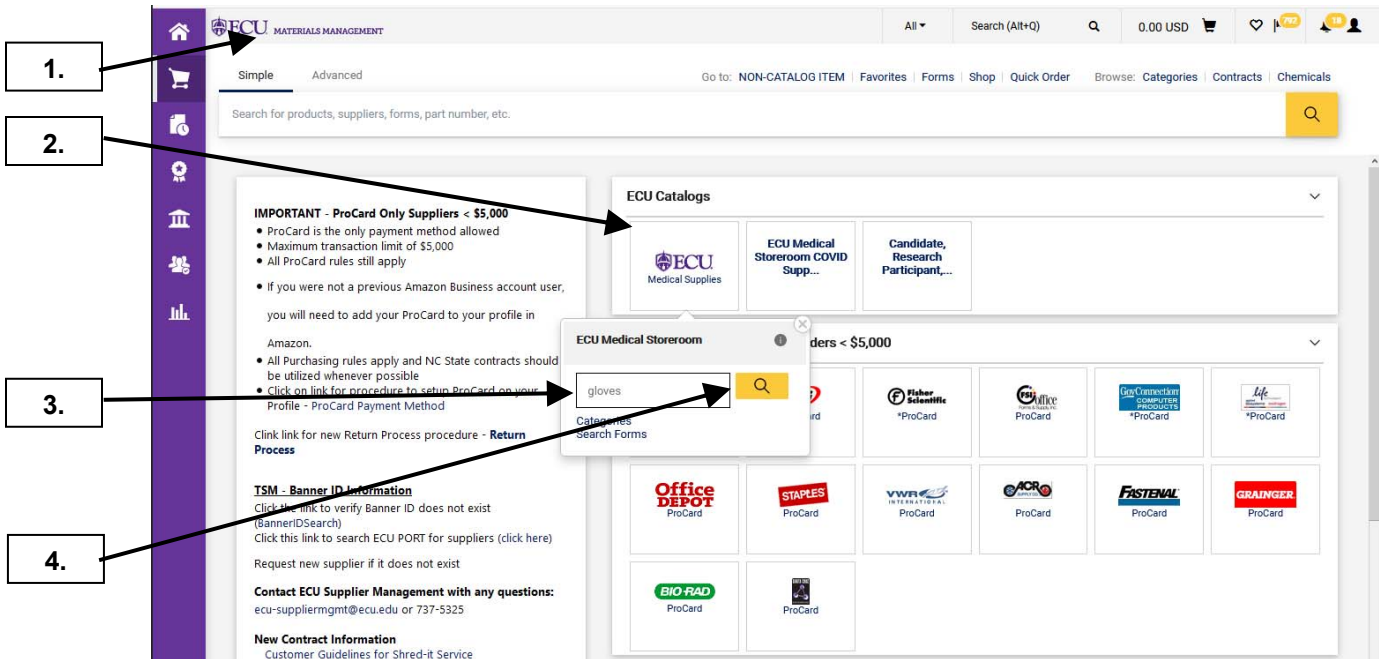
Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 Dell 24 Monitor - P2419H, Dell 24 Monitor - P2419H	210-AQDX	EA	187.59	3 EA	562.77

ITEM DETAILS

10. 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: 7/20/2021



SHOPPING CART – HOSTED STOREROOM CATALOG

Last Updated on: 7/20/2021

The screenshot shows the ECU Materials Management shopping cart interface. The search bar contains 'gloves' and the search results are displayed. Callout 7 points to the search results list, and callout 8 points to the 'Add to Cart' button for a specific item.

Item Name	Part Number	System Packaging	Quantity	Price	Stock Status
High Five Latex Glove, Extra Large, 10 Boxes of 100, 1000 Gloves	4900-5500	10/PK	1	11.60 USD	Out of stock (Medical Supplies)
GLOVES, CHEMICAL, SMALL 4T417	680-24170	1/PR	1	8.12 USD	Out of stock (Medical Supplies)
GLOVES, JERSEY,BROWN MEM-7100 1AV08	680-24190	1/PR	1	6.38 USD	Out of stock (Medical Supplies)
NITRILE POWDER FREE LARGE BOX DELTA ACG-120 NITREX	120-23440	1/BX	5	6.14 USD	Out of stock (Medical Supplies)

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.

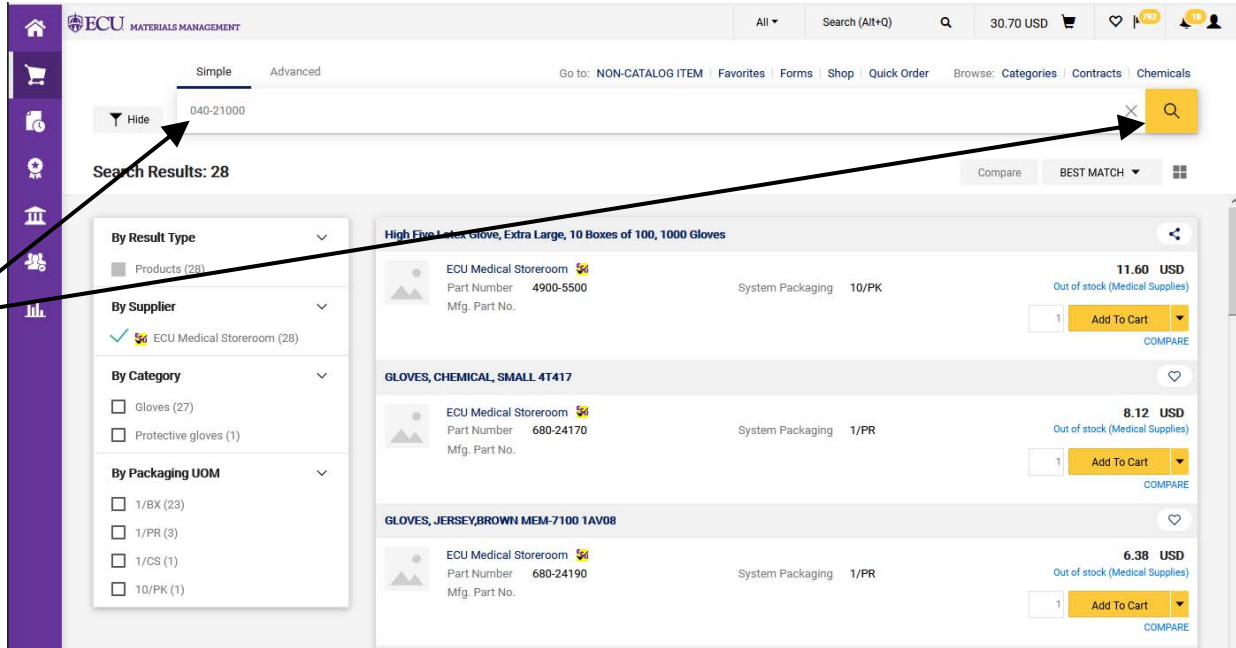
The screenshot shows the ECU Materials Management shopping cart interface. The shopping cart icon in the top right corner is highlighted with callout 9, indicating that the cart has been updated with the items added.

Item Name	Part Number	System Packaging	Quantity	Price	Stock Status
High Five Latex Glove, Extra Large, 10 Boxes of 100, 1000 Gloves	4900-5500	10/PK	1	11.60 USD	Out of stock (Medical Supplies)
GLOVES, CHEMICAL, SMALL 4T417	680-24170	1/PR	1	8.12 USD	Out of stock (Medical Supplies)
GLOVES, JERSEY,BROWN MEM-7100 1AV08	680-24190	1/PR	1	6.38 USD	Out of stock (Medical Supplies)

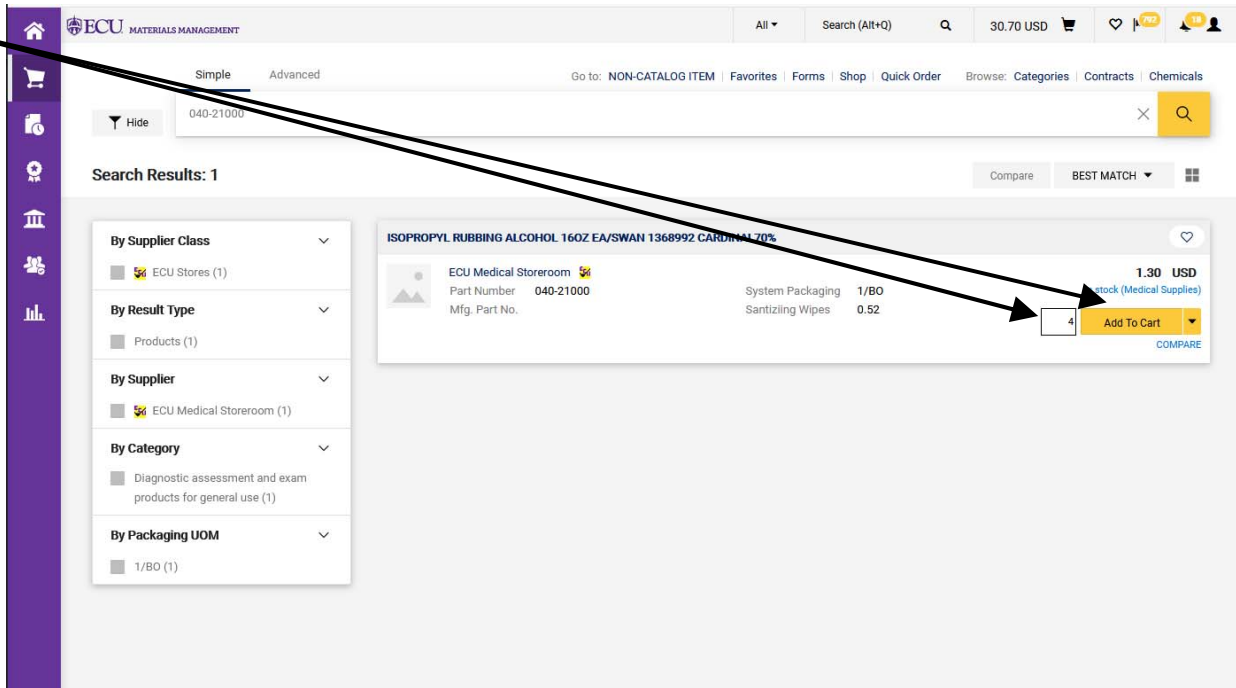
9. Notice that your shopping cart has been updated with the items that were just added. If you only have 1 item for your requisition, click on the shopping cart and skip to step 20 on page 6.

SHOPPING CART – HOSTED STOREROOM CATALOG

Last Updated on: 7/20/2021



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



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

SHOPPING CART – HOSTED STOREROOM CATALOG

Last Updated on: 7/20/2021

ECU MATERIALS MANAGEMENT | All | Search (Alt+Q) | 35.90 USD | View Cart | 18

Simple | Advanced | Go to: NON-CATALOG ITEM | Favorites | Forms | Shop

Hide | 040-21000

SUCCESS
4 items has been added to your cart | View Cart | Checkout

Compare | BEST MATCH

12.

Search Results: 1

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)

By Packaging UOM
1/BO (1)

ISOPROPYL RUBBING ALCOHOL 16OZ EA/SWAN 1368992 CARDINAL70%

ECU Medical Storeroom
Part Number 040-21000 | System Packaging 1/BO
Mfg. Part No. | Santizing Wipes 0.52

1.30 USD
In stock (Medical Supplies)

4 | Add To Cart | COMPARE

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

ECU MATERIALS MANAGEMENT | All | Search (Alt+Q) | 35.90 USD | View Cart | 18

Simple | Advanced | Go to: NON-CATALOG ITEM | Favorites | Forms | Shop | Quick Order | Browse: Categories | Contracts | Chemicals

Hide | ECU Medical Storeroom

SUCCESS
4 items has been added to your cart | View Cart | Checkout

Compare | BEST MATCH

13.

Search Results: 1

By Result Type
Products (1)

By Supplier
ECU Medical Storeroom (1)

By Category
Diagnostic assessment and exam products for general use (1)

By Packaging UOM
1/BO (1)

ISOPROPYL RUBBING ALCOHOL 16OZ EA/SWAN 1368992 CARDINAL70%

ECU Medical Storeroom
Part Number 040-21000 | System Packaging 1/BO
Mfg. Part No. | Santizing Wipes 0.52

1.30 USD
In stock (Medical Supplies)

1 | Add To Cart | COMPARE

14.

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 **Search** button.

SHOPPING CART – HOSTED STOREROOM CATALOG

Last Updated on: 7/20/2021

ECU MATERIALS MANAGEMENT

All Search (Alt+Q) 35.90 USD

Simple Advanced Go to: NON-CATALOG ITEM | Favorites | Forms | Shop | Quick Order Browse: Categories | Contracts | Chemicals

Hide ECU Medical Storeroom

Search Results: 641 Compare BEST MATCH

By Manufacturer

- ABC Manufacturer (1)
- All Things Pink (1)
- green pen company (1)
- Happy Hour Distributors (1)
- HEWLETT-PACKARD (1)

Show all

By Category

- Diagnostic assessment and exam products for general use (193)
- Intravenous or arterial tubing administration sets (43)
- Bandages and dressings and related products (42)
- Blood administration and transfusion products (29)
- Gloves (27)

Show all

Medical Supplies Special Orders

ECU Medical Storeroom 0.00 USD View Form

TAG, NAME, GOLD ECU, FORMAL USE 50/PK, ADHESIVE BACK

ECU Medical Storeroom 3.36 USD Out of stock (Medical Supplies)
Part Number 505-13629 System Packaging 1/PK
Mfg. Part No. Add To Cart COMPARE

Liquid Nitrogen Medical Grade NF Dewar Refill

ECU Medical Storeroom 1.16 USD Out of stock (Medical Supplies)
Part Number 38125 System Packaging 1/L
Mfg. Part No. Add To Cart COMPARE

TISSUES, KLEENEX; 2 PLY 36BX/CSE 21400

ECU Medical Storeroom 1.13 USD In stock (Medical Supplies)
Part Number 190-27260 System Packaging 1/BX
Mfg. Part No. Sanitizing Wipes 9495-01 Add To Cart COMPARE

15. Scroll down the **Filters** until you reach **By Category** section

16. Click on the **show all** link to see all the categories for ECU Medical Storeroom.

ECU MATERIALS MANAGEMENT

All Search (Alt+Q) 35.90 USD

Simple Advanced Go to: NON-CATALOG ITEM | Favorites | Forms | Shop | Quick Order Browse: Categories | Contracts | Chemicals

Hide ECU Medical Storeroom

Search Results: 641 Compare BEST MATCH

By Category

- Absorbent Materials (1)
- Alkaline Batteries (5)
- Aluminum foil (2)
- Antagonists (3)
- Apparel and Promotional Items (2)
- Applicator swabs and cotton balls (4)
- Autoclave Bags (3)
- Autoclave Tape (3)
- Bandages and dressings and related products (42)
- Biohazard Bags (4)
- Biology resource or activity books (1)
- Blood administration and transfusion products (29)
- Bookcases (1)
- Carboxylic Acid Salts (2)
- Cardstock papers (1)

Medical Supplies Special Orders

ECU Medical Storeroom 0.00 USD View Form

TAG, NAME, GOLD ECU, FORMAL USE 50/PK, ADHESIVE BACK

ECU Medical Storeroom 3.36 USD Out of stock (Medical Supplies)
Part Number 505-13629 System Packaging 1/PK
Mfg. Part No. Add To Cart COMPARE

Liquid Nitrogen Medical Grade NF Dewar Refill

ECU Medical Storeroom 1.16 USD Out of stock (Medical Supplies)
Part Number 38125 System Packaging 1/L
Mfg. Part No. Add To Cart COMPARE

TISSUES, KLEENEX; 2 PLY 36BX/CSE 21400

ECU Medical Storeroom 1.13 USD In stock (Medical Supplies)
Part Number 190-27260 System Packaging 1/BX
Mfg. Part No. Sanitizing Wipes 9495-01 Add To Cart COMPARE

17. Within the **By Category** filter, you can scroll down until you find the desired category. We will use **Bandages and dressings and related products** for this example.

18. Select the **Bandages and dressings and related products** checkbox.

SHOPPING CART – HOSTED STOREROOM CATALOG

Last Updated on: 7/20/2021

19.

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

20.

20. 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: 7/20/2021

21.

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

22.

Shopping Cart • 3271866

Correct these issues.
You are unable to proceed until addressed.
Required: State Exempt

Item	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	5 BX	30.70

	66.77 USD
Subtotal	66.77
Shipping	0.00
Handling	0.00
Total	66.77 USD

22. This completes the steps for shopping the Medical Storeroom's hosted catalog and brings you to the **Shopping Cart** edit section. See the **Edit Cart Header** procedure to continue the review process.

SHOPPING CART – HOSTED CATALOG

Last Updated on: 7/20/2021

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.

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.

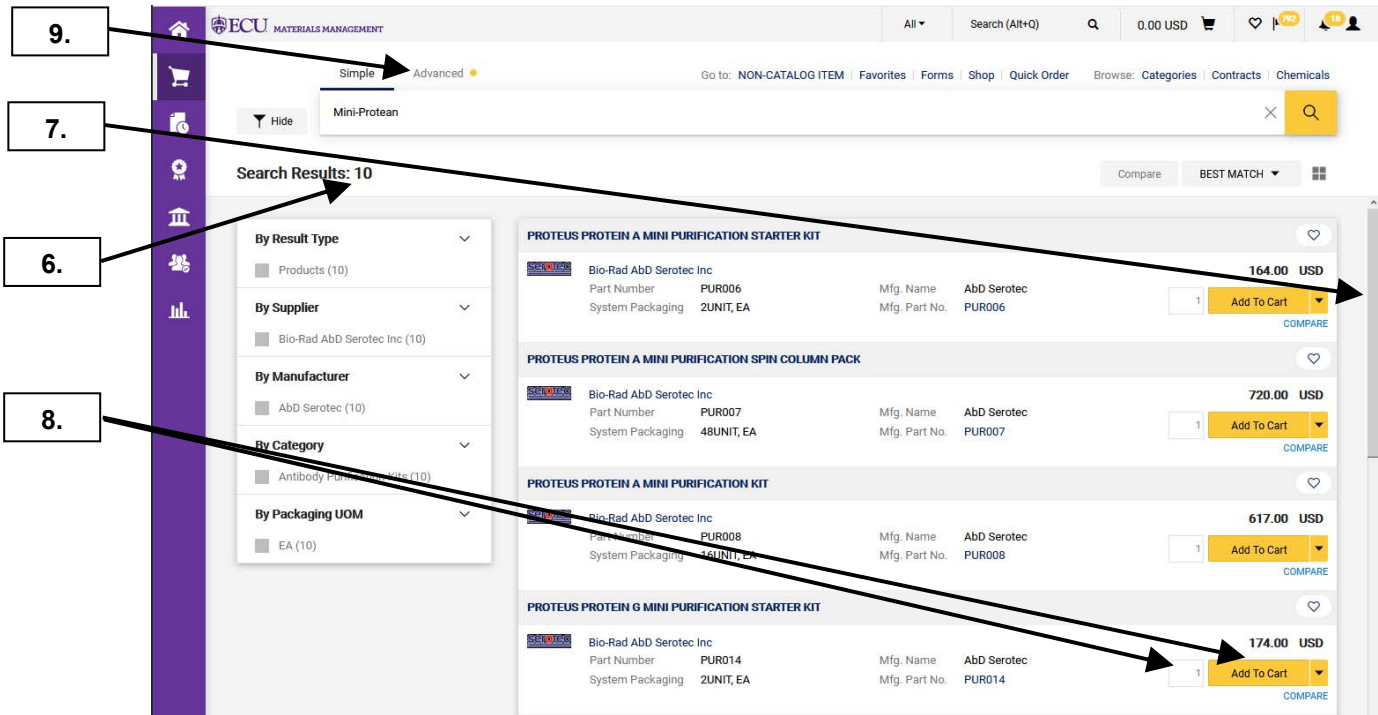
4. Enter vendor's name in **Supplier** field.

5. Click the **Search** button.

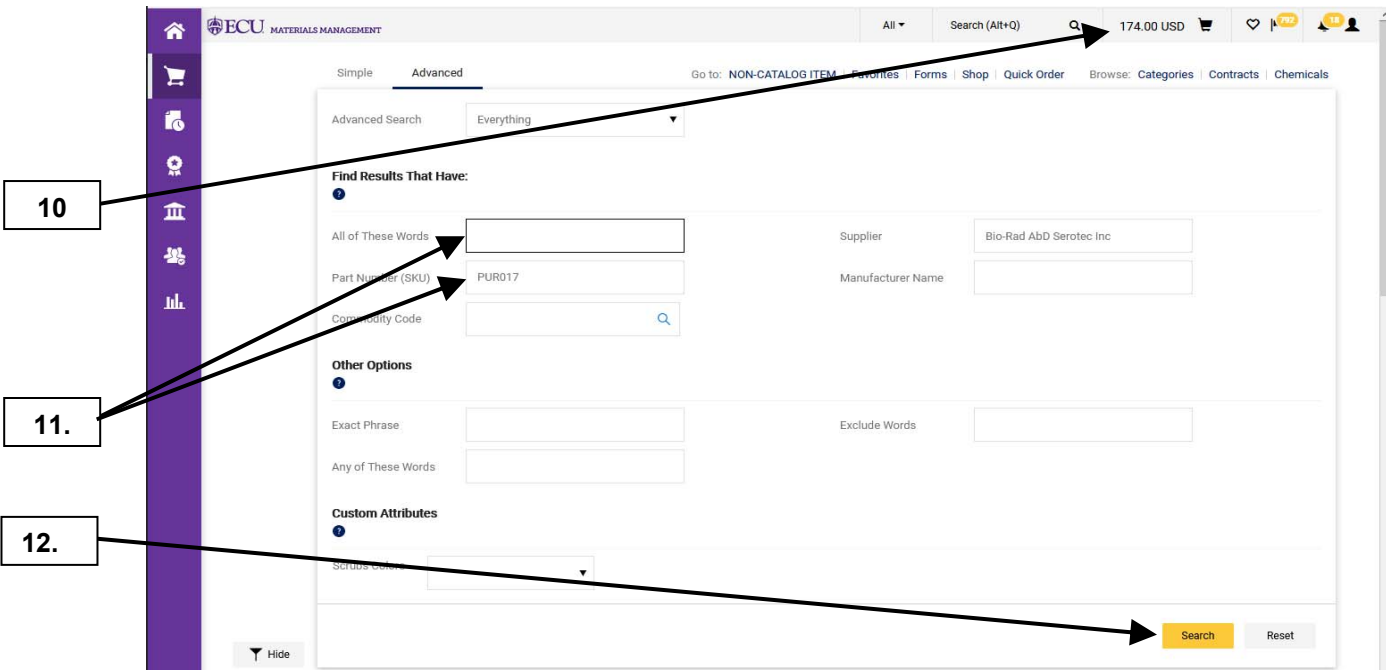
3. Enter desired description for item in **All of These Words** field.
4. Enter vendor's name in **Supplier** field.
5. Click the **Search** button.

SHOPPING CART – HOSTED CATALOG

Last Updated on: 7/20/2021



6. The # of items found will be displayed clearly in **Search Results**.
7. Scroll down the 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.
9. Click on **Advanced** tab to initiate another search.



10. Notice the item was added to the shopping cart.
11. 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.
12. Click on **Search** button.

SHOPPING CART – HOSTED CATALOG

Last Updated on: 7/20/2021

The screenshot shows the ECU Materials Management shopping cart interface. At the top, the header includes the ECU logo, 'MATERIALS MANAGEMENT', a search bar with 'Search (Alt+Q)', and a total price of '174.00 USD'. Below the header, there are navigation links for 'Go to: NON-CATALOG ITEM', 'Favorites', 'Forms', 'Shop', 'Quick Order', and 'Browse: Categories', 'Contracts', 'Chemicals'. A search bar with 'Search for products, forms, etc.' and a magnifying glass icon is present. The main content area shows 'Search Results: 1' for the item 'PROTEUS IMAC BUFFER PACK'. The item details include 'Bio-Rad AbD Serotec Inc', 'Part Number PUR017', 'System Packaging EA', 'Mfg. Name AbD Serotec', and 'Mfg. Part No. PUR017'. The price is '81.00 USD'. A quantity input field shows '4' and an 'Add To Cart' button. A 'COMPARE' button is also visible. On the left, there are filter options: 'By Result Type' (Products (1)), 'By Supplier' (Bio-Rad AbD Serotec Inc (1)), 'By Manufacturer' (AbD Serotec (1)), 'By Category' (Chemical Indicators (1)), and 'By Packaging UOM' (EA (1)). A box with the number '13.' has an arrow pointing to the 'Add To Cart' button.

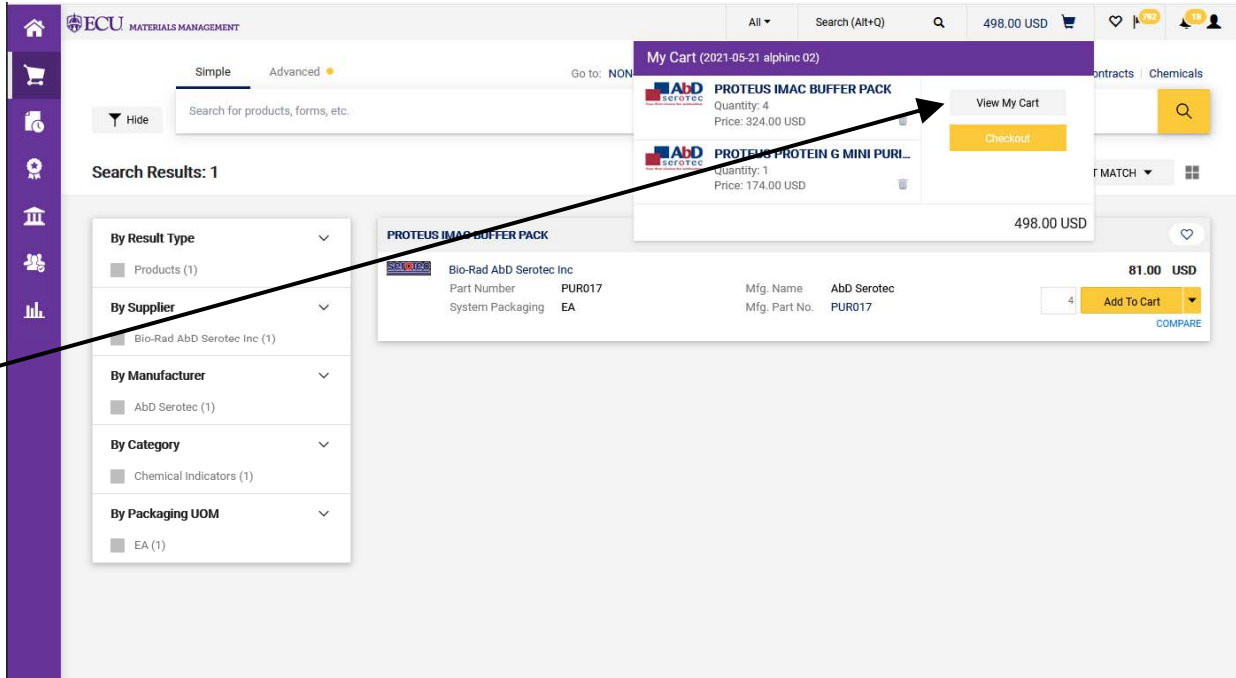
13. Change the quantity to the amount needed for the order and click **Add to Cart** button

The screenshot shows the ECU Materials Management shopping cart interface after the item has been added. The header now shows a total price of '498.00 USD'. A success message is displayed: 'SUCCESS 4 items has been added to your cart'. Below the message are 'View Cart' and 'Checkout' buttons. The main content area shows the same search results for 'PROTEUS IMAC BUFFER PACK' as in the previous screenshot. A box with the number '14.' has an arrow pointing to the shopping cart icon in the top right corner.

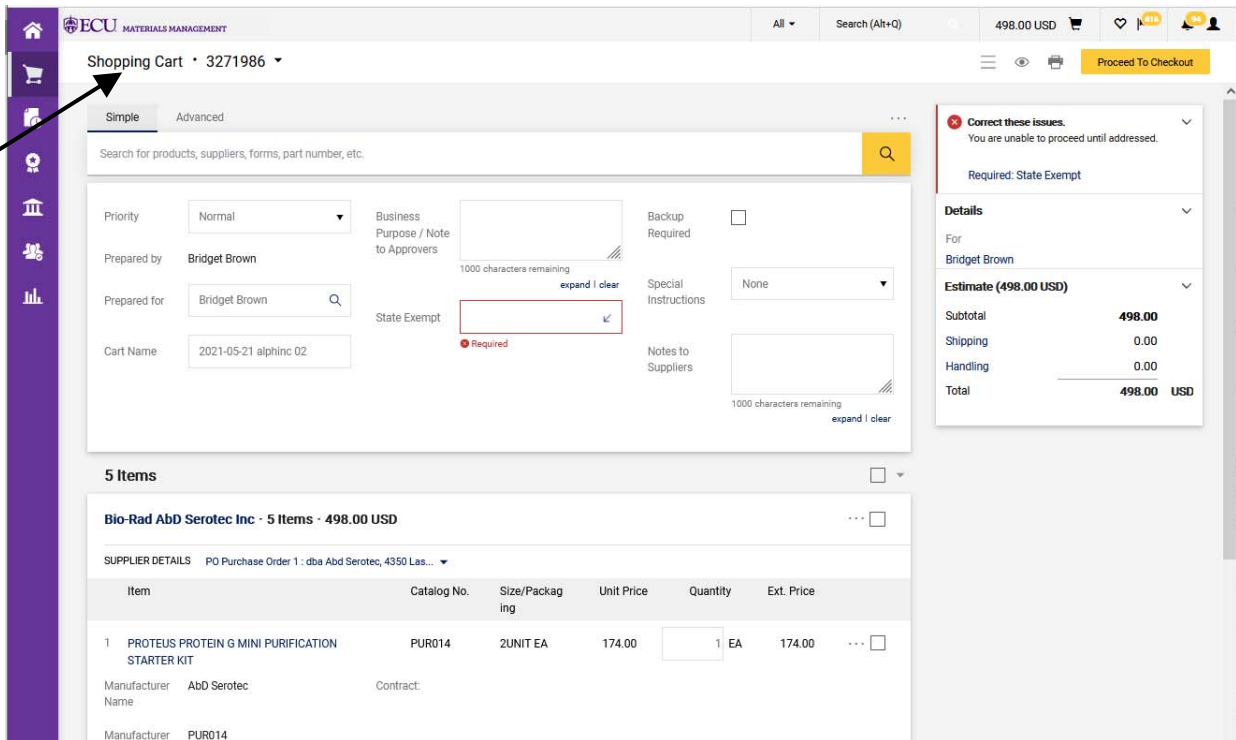
14. Notice that your shopping cart has been updated with the items that were just added. Click on the shopping cart after adding the final item to the order.

SHOPPING CART – HOSTED CATALOG

Last Updated on: 7/20/2021



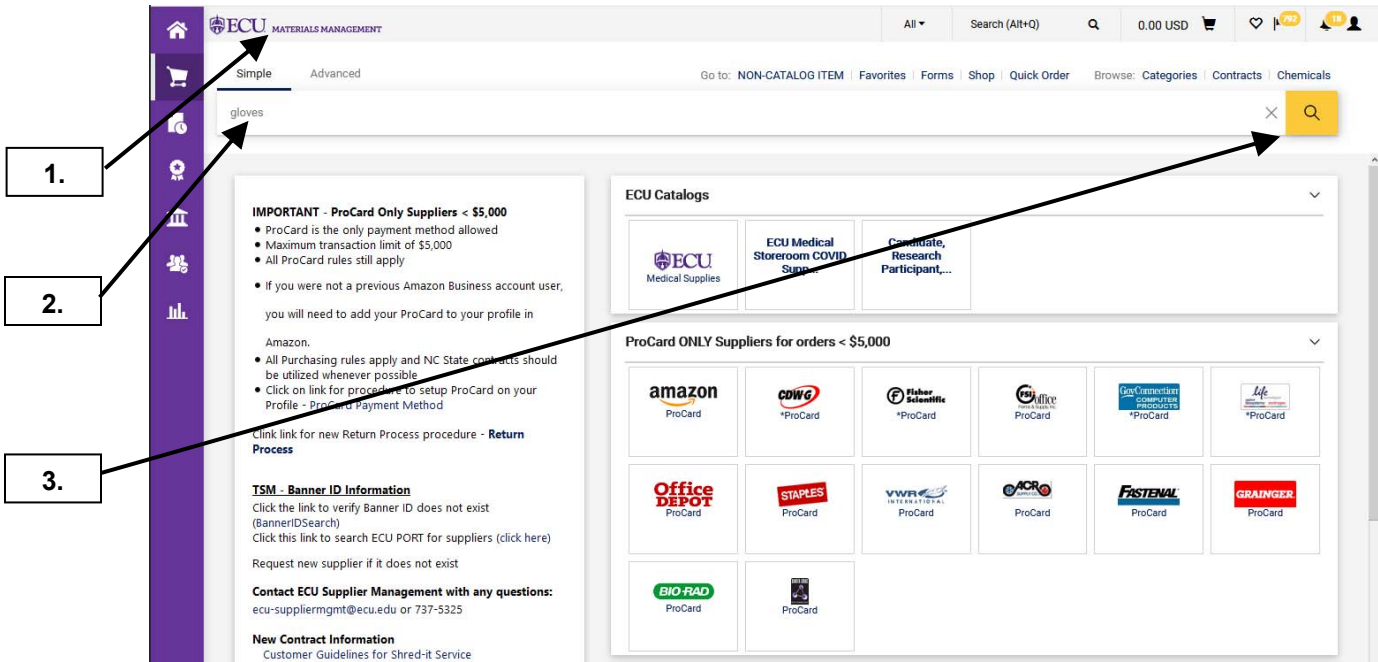
15. Click on **View My Cart** button.



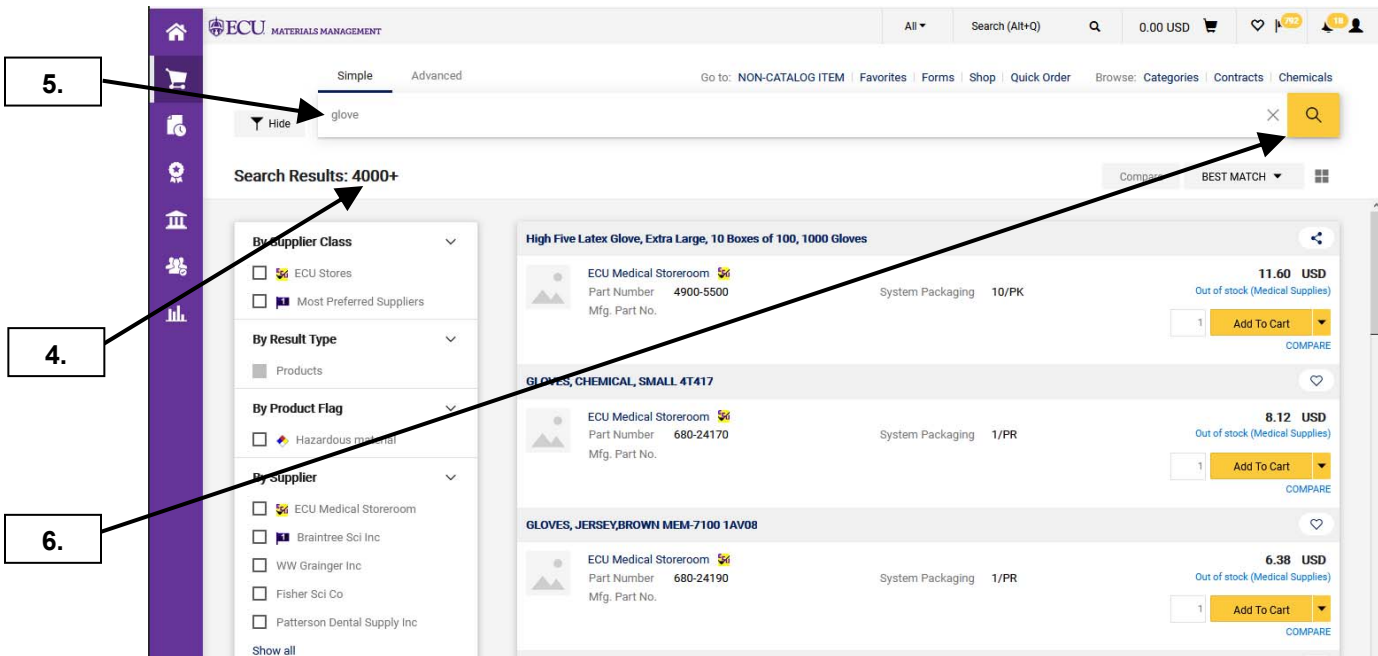
16. This brings you to **Shopping Cart** edit section. See the **Edit Cart Header** procedure to continue the review process.

SHOPPING CART – IMPROVED HOSTED CATALOG SEARCH

Last Updated on: 5/24/2021



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 **Search** button.



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 **Search** button.

SHOPPING CART – IMPROVED HOSTED CATALOG SEARCH

Last Updated on: 5/24/2021

The screenshot shows the ECU Materials Management shopping cart interface. The search bar contains the text 'glove'. The search results are displayed in a list format, showing various glove products with their prices and 'Add To Cart' buttons. A callout box with the number '7.' points to the search bar.

Product Name	Supplier	Part Number	System Packaging	Price
High Five Latex Glove, Extra Large, 10 Boxes of 100, 1000 Gloves	ECU Medical Storeroom	4900-5500	10/PK	11.60 USD
GLOVES, CHEMICAL, SMALL 4T417	ECU Medical Storeroom	680-24170	1/PR	8.12 USD
GLOVES, JERSEY,BROWN MEM-7100 1AV08	ECU Medical Storeroom	680-24190	1/PR	6.38 USD
KEVLAR HANDLING GLOVES	Braintree Sci Inc	KLV-LTH-X	PR	95.00 USD

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 the text '040-21000'. The search results are displayed in a list format, showing various glove products with their prices and 'Add To Cart' buttons. Callout boxes with the numbers '8.' and '9.' point to the search bar and the search button, respectively.

Product Name	Supplier	Part Number	System Packaging	Price
High Five Latex Glove, Extra Large, 10 Boxes of 100, 1000 Gloves	ECU Medical Storeroom	4900-5500	10/PK	11.60 USD
GLOVES, CHEMICAL, SMALL 4T417	ECU Medical Storeroom	680-24170	1/PR	8.12 USD
GLOVES, JERSEY,BROWN MEM-7100 1AV08	ECU Medical Storeroom	680-24190	1/PR	6.38 USD

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 **Search** button.

SHOPPING CART – IMPROVED HOSTED CATALOG SEARCH

Last Updated on: 5/24/2021

The screenshot shows the ECU Materials Management search interface. The search bar contains '040-21000'. The search results show one item: 'ISOPROPYL RUBBING ALCOHOL 16OZ EA/SWAN 1368992 CARDINAL70%'. The item details include 'ECU Medical Storeroom' as the supplier, 'Part Number 040-21000', 'System Packaging 1/BO', and 'Santizing Wipes 0.52'. The price is '1.30 USD' and it is 'In stock (Medical Supplies)'. There is an 'Add To Cart' button and a 'COMPARE' link. The search filters on the left include 'By Supplier Class', 'By Result Type', 'By Supplier', 'By Category', and 'By Packaging UOM'. A callout box labeled '11.' points to the search bar, '10.' points to the search results, and '12.' points to the search button.

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

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

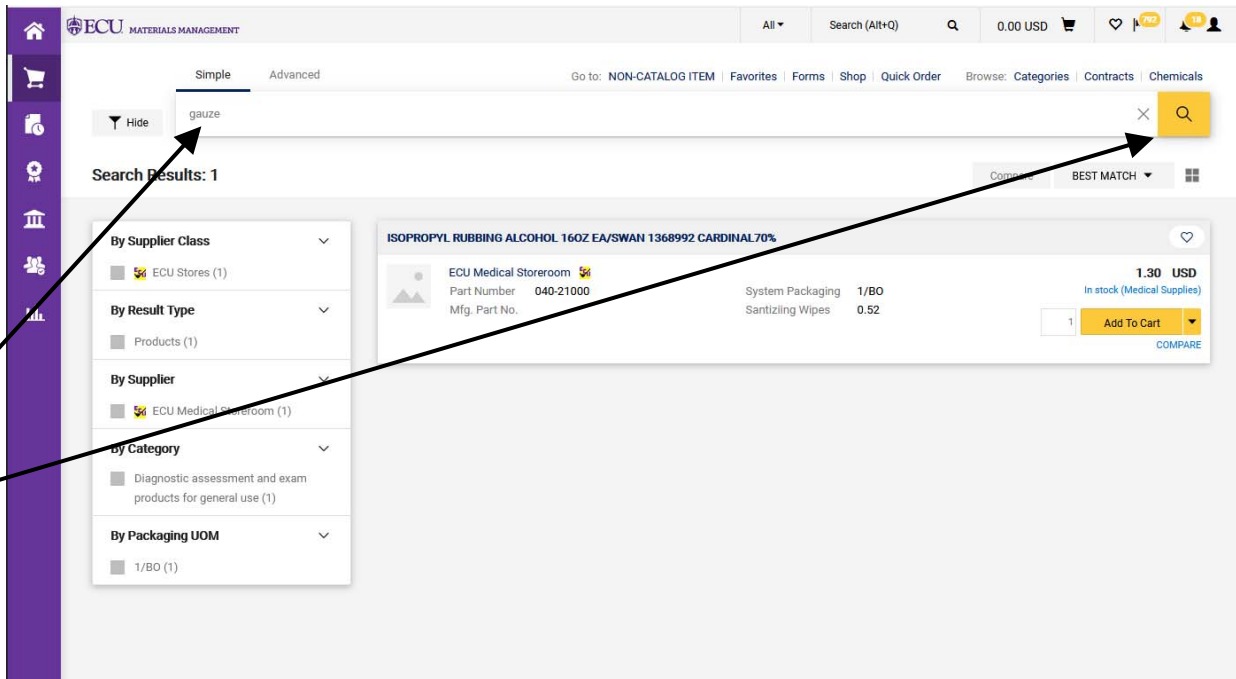
12. Click on the **Search** button.

The screenshot shows the ECU Materials Management search interface. The search bar contains '04021000'. The search results show one item: 'ISOPROPYL RUBBING ALCOHOL 16OZ EA/SWAN 1368992 CARDINAL70%'. The item details include 'ECU Medical Storeroom' as the supplier, 'Part Number 040-21000', 'System Packaging 1/BO', and 'Santizing Wipes 0.52'. The price is '1.30 USD' and it is 'In stock (Medical Supplies)'. There is an 'Add To Cart' button and a 'COMPARE' link. The search filters on the left include 'By Supplier Class', 'By Result Type', 'By Supplier', 'By Category', and 'By Packaging UOM'. A callout box labeled '13.' points to the search results.

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

SHOPPING CART – IMPROVED HOSTED CATALOG SEARCH

Last Updated on: 5/24/2021

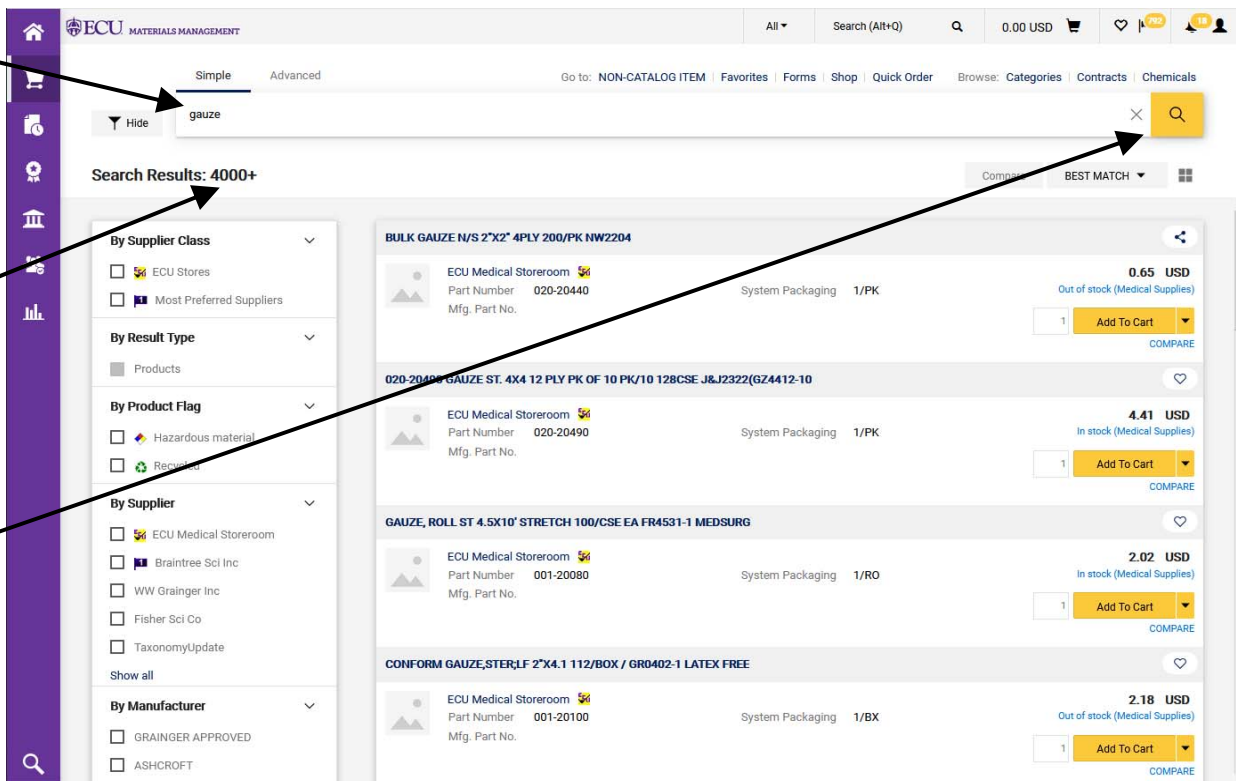


14.

15.

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

15. Click on the **Search** button.



17.

16.

18.

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 **Search** button.

SHOPPING CART – IMPROVED HOSTED CATALOG SEARCH

Last Updated on: 5/24/2021

The screenshot displays the ECU Materials Management shopping cart interface. At the top, the header includes the ECU logo, 'MATERIALS MANAGEMENT', and navigation options like 'All', 'Search (Alt+Q)', '0.00 USD', and user icons. Below the header, there are tabs for 'Simple' and 'Advanced' search, and a search bar containing the text 'gause'. The search results are displayed in a list format, showing various items such as 'Axial Probe, 4 in. for model 5170 gauss meter 2000130', 'Transverse Probe, 4 in. for model 5180 Gauss Meter 2000131', 'YA-111 ZERO GAUSS CHAMBER 2000132', and 'Magnetic Field Gauss Meter, 1/EA'. Each item listing includes details like Part Number, System Packaging, Mfg. Name, and Mfg. Part No. A sidebar on the left provides filtering options under categories like 'By Supplier Class', 'By Result Type', 'By Product Flag', and 'By Supplier'. A callout box with the number '19.' points to the search results area.

Search Results: 4000+

By Supplier Class

- ECU Stores
- Most Preferred Suppliers

By Result Type

- Products

By Product Flag

- Hazardous material
- Recycled

By Supplier

- ECU Medical Storeroom
- Braintree Sci Inc
- WW Grainger Inc
- Fisher Sci Co
- TaxonomyUpdate

Show all

Item Name	Part Number	System Packaging	Mfg. Name	Mfg. Part No.	Order From Supplier
Axial Probe, 4 in. for model 5170 gauss meter 2000130	50632937	EA	Cole Parmer 3P	2000130	Order From Supplier
Transverse Probe, 4 in. for model 5180 Gauss Meter 2000131	50632938	EA	Cole Parmer 3P	2000131	Order From Supplier
YA-111 ZERO GAUSS CHAMBER 2000132	50632941	EA	Cole-Parmer	2000132	Order From Supplier
Magnetic Field Gauss Meter, 1/EA	NC9023681	EA	Omega Engineering Inc	HHG191	Order From Supplier

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

SHOPPING CART – FILTER ON MULTIPLE VALUES FOR HOSTED CATALOG

Last Updated on: 5/24/2021

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

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

3. Click **Search** button.

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

4. Click on the **Show all** link to filter **By Supplier**.

4. Click on the **Show all** link to filter **By Supplier**.

SHOPPING CART – FILTER ON MULTIPLE VALUES FOR HOSTED CATALOG

Last Updated on: 5/24/2021

ECU MATERIALS MANAGEMENT

Search (Alt+Q) 0.00 USD

Simple Advanced

Go to: NON-CATALOG ITEM | Favorites | Forms | Shop | Quick Order | Browse: Categories | Contracts | Chemicals

Hide gauze

Search Results: 4000+

Compare BEST MATCH

By Supplier

- Beckman Coulter Inc
- Bio-Rad Labs
- Braintree Scientific
- Cardinal Health 200 Inc
- Chemglass Life Sci LLC
- ECU Medical Storeroom
- Fastenal Co
- Fisher Sci Co
- Office Depot
- Patterson Dental Supply Inc
- Pierce Biotechnology Inc
- Research Products Intl Corp
- Sigma-Aldrich Inc
- Staples Inc
- TaxonomyUpdate
- WW Graining Inc

Show less

BULK GAUZE N/S 2"X2" 4PLY 200/PK NW2204

ECU Medical Storeroom
Part Number 020-20440
Mfg. Part No.

System Packaging 1/PK

0.65 USD
Out of stock (Medical Supplies)

1 Add To Cart

020-20490 GAUZE ST. 4X4 12 PLY PK OF 10 PK/10 128CSE J&J2322(GZ4412-10)

ECU Medical Storeroom
Part Number 020-20490
Mfg. Part No.

System Packaging 1/PK

4.41 USD
In stock (Medical Supplies)

1 Add To Cart

GAUZE, ROLL ST 4.5X10' STRETCH 100/CSE EA FR4531-1 MEDSURG

ECU Medical Storeroom
Part Number 001-20080
Mfg. Part No.

System Packaging 1/RO

2.02 USD
In stock (Medical Supplies)

1 Add To Cart

CONFORM GAUZE,STER,LF 2"X4.1 112/BOX / GR0402-1 LATEX FREE

ECU Medical Storeroom
Part Number 001-20100
Mfg. Part No.

System Packaging 1/BX

2.18 USD
Out of stock (Medical Supplies)

5. Note that you will need to click in the Filter section to scroll down to see all the suppliers. For this example, we will select **Fisher Sci Co**.

ECU MATERIALS MANAGEMENT

Search (Alt+Q) 0.00 USD

Simple Advanced

Go to: NON-CATALOG ITEM | Favorites | Forms | Shop | Quick Order | Browse: Categories | Contracts | Chemicals

Hide gauze

Search Results: 4000+

Compare BEST MATCH

Fisher Sci Co

By Manufacturer

- Hamilton Company
- Restek Corporation
- Cole Parmer 3P
- BD Vacutainer Labware Medical
- Trajan Scientific Technologies Inc

Show all

By Category

- Disposable Syringes
- Hypodermic injection apparatus
- Physical Testing Equipment/Supplies
- First Aid Equipment
- Laboratory Tools

Show all

By Packaging UOM

Packing Retaining Gauzes for ATD 400, Pkg 100 L4071034

Fisher Sci Co
Part Number 509051880
System Packaging 1UNIT,PK

Mfg. Name Perkin Elmer Las Inc
Mfg. Part No. L4071034

Order From Supplier

Palladium Nickel gauze, 75x75mm 44698-FL 1/EA

Fisher Sci Co
Part Number AA44698FL
System Packaging 1UNIT, 1/EA

Mfg. Name Alfa Aesar
Mfg. Part No. 44698-FL

Order From Supplier

Palladium Nickel gauze, 150x150mm 44698-GT 1/EA

Fisher Sci Co
Part Number AA44698GT
System Packaging 1UNIT, 1/EA

Mfg. Name Alfa Aesar
Mfg. Part No. 44698-GT

Order From Supplier

Monel 400 gauze, 100 x 100mm 45063-GH 1/EA

Fisher Sci Co
Part Number AA45063GH
System Packaging 1UNIT, 1/EA

Mfg. Name Alfa Aesar
Mfg. Part No. 45063-GH

Order From Supplier

Monel 400 gauze, 150 x 150mm 45063-GT 1/EA

6. Notice that the total count includes results with the following filters: **gauze** and **Fisher Sci Co**.
7. Scroll down Filter section to filter **By Category**.
8. Click on **Show all** link.

SHOPPING CART – FILTER ON MULTIPLE VALUES FOR HOSTED CATALOG

Last Updated on: 5/24/2021

The screenshot shows the ECU Materials Management shopping cart interface. The search bar contains 'gauze' and the results show 4000+ items. The 'By Category' filter is expanded, and the 'Bandages and dressings and related products' checkbox is highlighted by a callout box labeled '9.'. The main product list includes items like 'Packing Retaining Gauzes for ATD 400, Pkg 100 L4071034', 'Palladium Nickel gauze, 75x75mm 44698-FL 1/EA', and 'Monel 400 gauze, 100 x 100mm 45063-GH 1/EA'.

9. Click on desired **By Category** check box. For this example, we will select **Bandages and dressings and related products**.

The screenshot shows the ECU Materials Management shopping cart interface with search results for 'gauze' filtered to 84 items. The 'Your Selections' filter section is expanded, showing 'By Supplier: Fisher Sci Co' and 'By Category: Bandages and related products' selected. The main product list includes items like 'Curity Gauze Sponges', 'Kendall Healthcare DERMACEA Gauze Fluff Rolls; Sterile; 4 in. x 4.1 yd. (10.2cm x 3.7m); 100/CS 441106', and '4inX4in GAUZE SQUARE, 500/PK, 10PKS/CS'.

10. Notice the results from the filtered criteria.

SHOPPING CART – FILTER ON MULTIPLE VALUES FOR HOSTED CATALOG

Last Updated on: 5/24/2021

11.

ECU MATERIALS MANAGEMENT

Search (Alt+Q) 0.00 USD

Simple Advanced

Go to: NON-CATALOG ITEM | Favorites | Forms | Shop | Quick Order | Browse: Categories | Contracts | Chemicals

Hide gauze

Search Results: 84

Compare BEST MATCH

Your Selections

- By Supplier: Fisher Sci Co
- By Category: Bandages and dr...
- By Result Type
 - Products (84)
- By Product Flag
 - Hazardous material (5)
- By Supplier
 - Fisher Sci Co (84)
- By Manufacturer
 - Honeywell Safety Products Usa Inc (34)
 - Covidien (11)
 - Butler Schein Animal Health (8)
 - Dynarex Corporation (8)
 - Jelliff Corporation (4)

Curity Gauze Sponges

Part Number	System Packaging	Mfg. Name	Mfg. Part No.	Order From Supplier
NC0021086	CS	Andwin Scientific	82004756	<input type="checkbox"/>

Kendall Healthcare DERMACEA Gauze Fluff Rolls; Sterile; 4 in. x 4.1 yd. (10.2cm x 3.7m); 100/CS 441106

Part Number	System Packaging	Mfg. Name	Mfg. Part No.	Order From Supplier
22037980	CS	Covidien	441106	<input type="checkbox"/>

4inX4in GAUZE SQUARE, 500/PK, 10PKS/CS

Part Number	System Packaging	Mfg. Name	Mfg. Part No.	Order From Supplier
NC9047792	CS	Shields Dina Corporation	J-44	<input type="checkbox"/>

Gauze Sponges Non-Sterile 200/bag exceeds USP Type VII gauze requirements 2634

Part Number	System Packaging	Mfg. Name	Mfg. Part No.	Order From Supplier
NC0304134	CS	Hannas Pharmaceutical Supply Co Inc	2634	<input type="checkbox"/>

North Gauze Pad; 2 x 2 in.; 4000/Cs.; 4000/CS 802212C

11. To remove a filter, click the “X” within **Your Selections**.

12.

ECU MATERIALS MANAGEMENT

Search (Alt+Q) 0.00 USD

Simple Advanced

Go to: NON-CATALOG ITEM | Favorites | Forms | Shop | Quick Order | Browse: Categories | Contracts | Chemicals

Hide gauze

Search Results: 242

Compare BEST MATCH

Your Selections

- By Category: Bandages and dr...
- By Supplier Class
 - ECU Stores (6)
- By Result Type
 - Products (242)
- By Product Flag
 - Hazardous material (17)
- By Supplier
 - ECU Medical Storeroom (6)
 - WW Grainger Inc (106)
 - Fisher Sci Co (84)
 - Fastenal Co (31)
 - Cardinal Health 200 Inc (10)
- By Manufacturer
 - Honeywell Safety Products Usa

BULK GAUZE 11/8 2"X2" 4PLY 200/PK NW2204

Part Number	System Packaging	Price	Availability
020-20440	1/PK	0.65 USD	Out of stock (Medical Supplies)

020-20490 GAUZE ST. 4X4 12 PLY PK OF 10 PK/10 128CSE J&J2322(GZ4412-10)

Part Number	System Packaging	Price	Availability
020-20490	1/PK	4.41 USD	In stock (Medical Supplies)

GAUZE, ROLL ST 4.5X10' STRETCH 100/CSE EA FR4531-1 MEDSURG

Part Number	System Packaging	Price	Availability
001-20080	1/RO	2.02 USD	In stock (Medical Supplies)

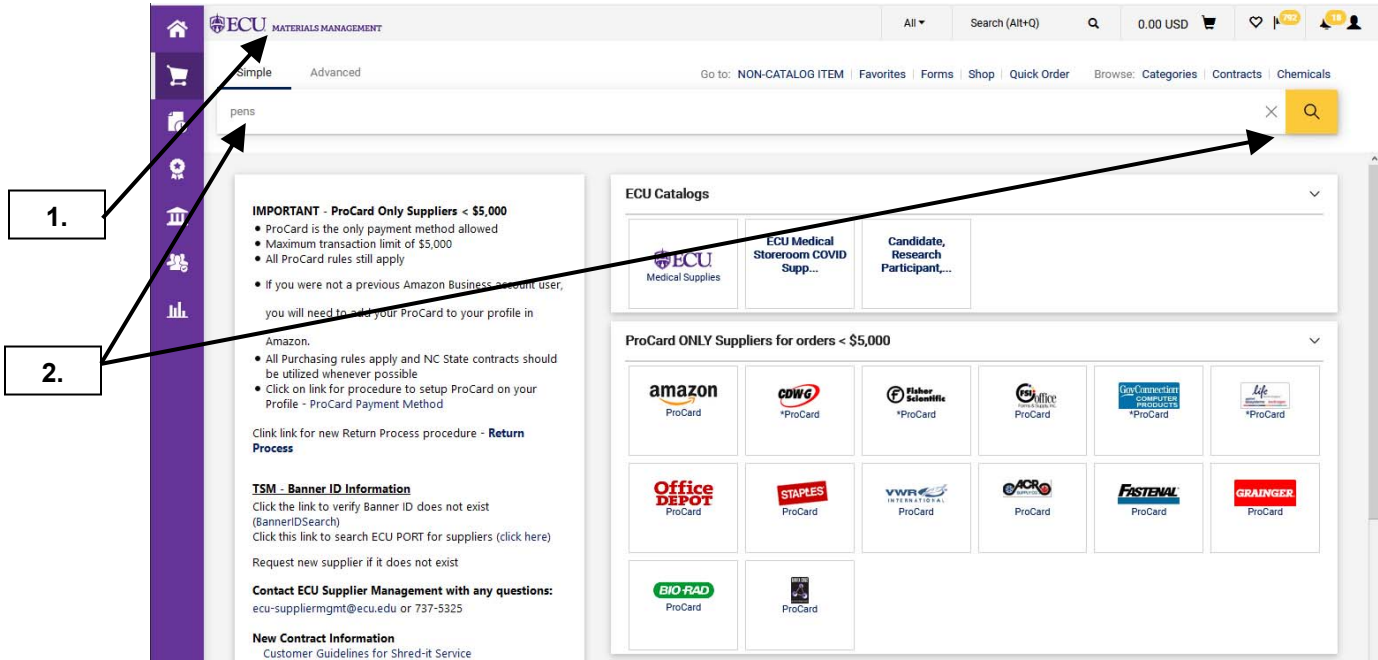
CONFORM GAUZE,STER,LF 2"X4.1 112/BOX / GR0402-1 LATEX FREE

Part Number	System Packaging	Price	Availability
001-20100	1/BX	2.18 USD	Out of stock (Medical Supplies)

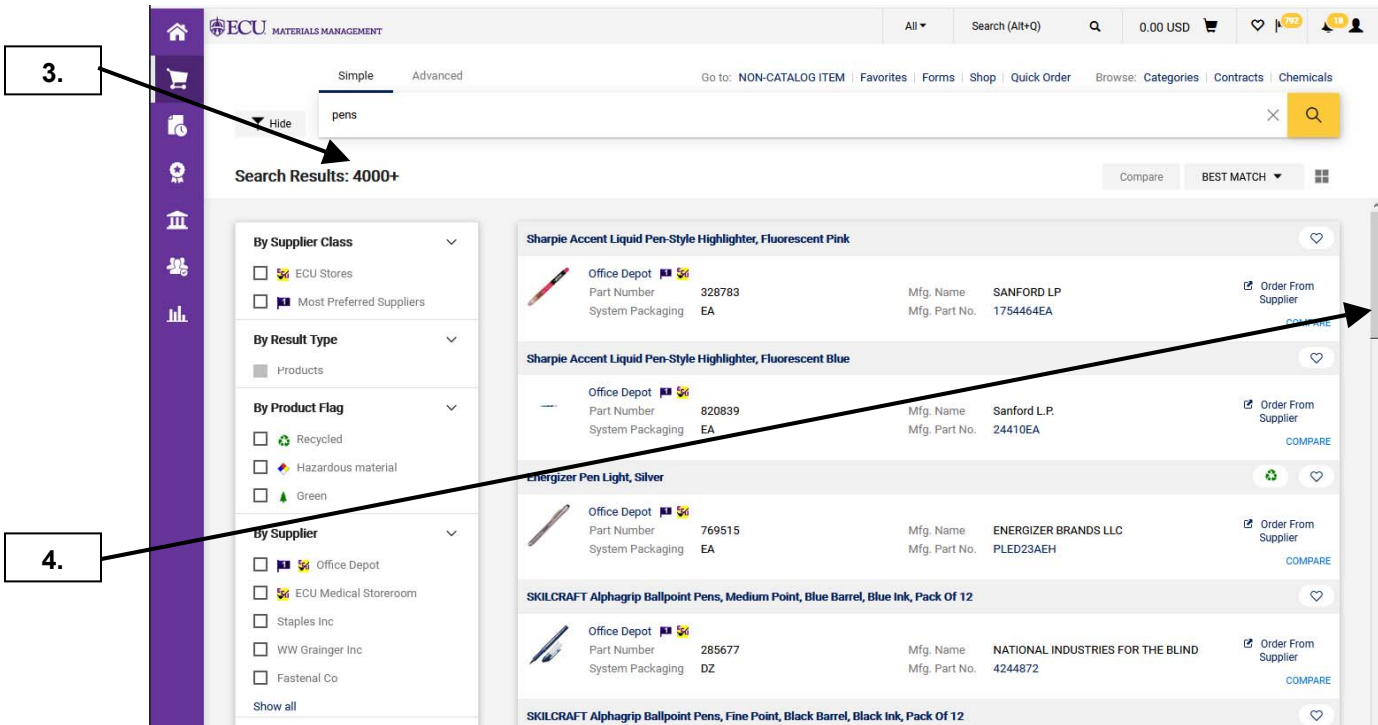
12. Notice the increase in results from removing the filter. **Note:** You can use the following filters: By Supplier Class, By Supplier, By Manufacture Name, By Category, By Product Flag, and By Packaging UOM. This completes the steps for **Filter on Multiple Values for Hosted Catalog Searches**.

SHOPPING CART – HOSTED CATALOG – LEVEL 2 PUNCH-OUT

Last Updated on: 5/24/2021



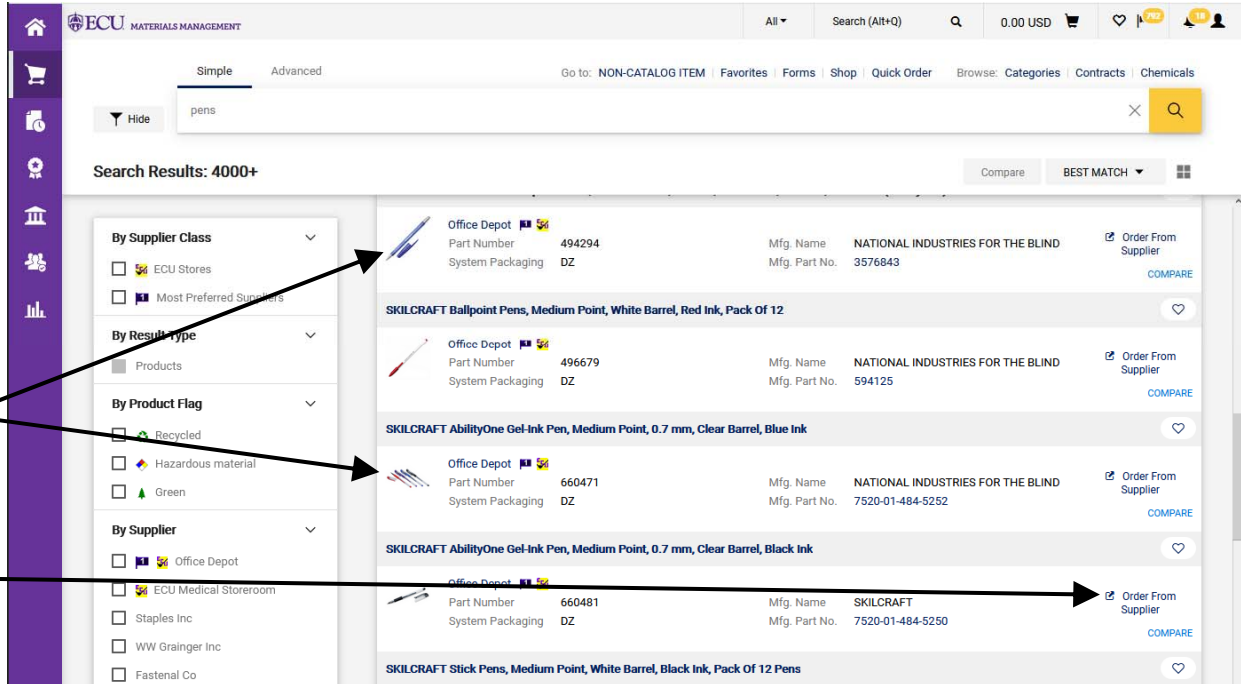
1. Ensure that you are on the **home/shop** tab.
2. Enter **pens** and click on the **Search** button. **Note:** Not all punch-out suppliers support SmartFind Level 2 feature that will display some of their catalog items in a PORT hosted catalog search.



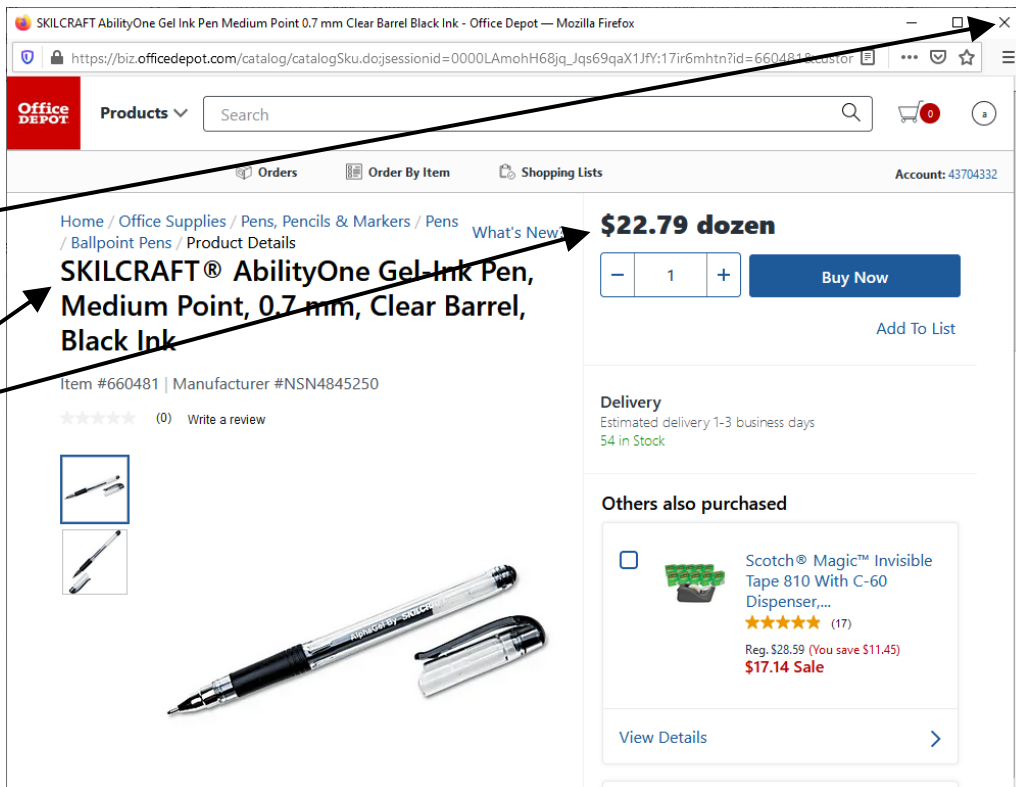
3. The # of items found will be displayed above the results.
4. Scroll down the page to find the desired item.

SHOPPING CART – HOSTED CATALOG – LEVEL 2 PUNCH-OUT

Last Updated on: 5/24/2021



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 **Buy Now** button.

SHOPPING CART – HOSTED CATALOG – LEVEL 2 PUNCH-OUT

Last Updated on: 5/24/2021

The screenshot displays the ECU Materials Management shopping cart interface. At the top, the header includes the ECU logo, 'MATERIALS MANAGEMENT', and navigation options like 'All', 'Search (Alt+Q)', '0.00 USD', and user icons. Below the header, there are tabs for 'Simple' and 'Advanced' search, and a search bar containing the text 'pens'. The search results show 'Search Results: 4000+' and a 'Compare' button. On the left, there are filter sections: 'By Supplier Class' (with options for ECU Stores and Most Preferred Suppliers), 'By Result Type' (with 'Products' selected), 'By Product Flag' (with 'Recycled', 'Hazardous material', and 'Green' options), and 'By Supplier' (with options for Office Depot, ECU Medical Storeroom, Staples Inc, WW Grainger Inc, and Fastenal Co). The main content area displays a list of search results for pens, including 'Office Depot' and 'SKILCRAFT' products, with details such as Part Number, System Packaging, Mfg. Name, and Mfg. Part No. An arrow points from a box containing the number '9.' to the search results area.

9.

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: 7/21/2021

Shopping Cart • Shopping Cart

Simple | Advanced

Search for products, suppliers, forms, part number, etc.

Priority: Normal

Prepared by: Bridget Brown

Prepared for: Bridget Brown

Cart Name: 2021-07-20 alphinc 01

Business Purpose / Note to Approvers: The grant for this order will expire on 8/30/2021

State Exempt: [Dropdown]

5 Items

Capital Ford Inc - 5 Items - 53,265.65 USD

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	2021 Ford Bronco	Car	EA	52,945.85	1 EA 52,945.85

Correct these issues. You are unable to proceed until addressed.

Required: State Exempt

Details

For: Bridget Brown

Estimate (53,265.65 USD)

Subtotal: 53,265.65

Shipping: 0.00

Handling: 0.00

Total: 53,265.65 USD

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 12 – 16.
3. **Optional:** Type in a meaningful name for **Cart Name** to find document in requisition searches.
4. Click the text box for **Business Purpose/Note to Approvers** if appropriate.
5. Click **arrow** for State Exempt field.

Shopping Cart • Shopping Cart

Simple | Advanced

Search for products, suppliers, forms, part number, etc.

Priority: Normal

Prepared by: Bridget Brown

Prepared for: Bridget Brown

Cart Name: 2021-07-20 alphinc 01

Business Purpose / Note to Approvers: The grant for this order will expire on 8/30/2021

State Exempt: [Dropdown]

5 Items

Capital Ford Inc - 5 Items - 53,265.65 USD

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	2021 Ford Bronco	Car	EA	52,945.85	1 EA 52,945.85

Correct these issues. You are unable to proceed until addressed.

Required: State Exempt

Details

For: Bridget Brown

Estimate (53,265.65 USD)

Subtotal: 53,265.65

Shipping: 0.00

Handling: 0.00

Total: 53,265.65 USD

Classroom Instruction -

Health Care -

Law Enforcement -

Maint of Campus Operations -

Non State Funds -

Public Safety -

Student Financial Aid -

* Existing Leases -

* Existing Maint Agreements -

* Existing Subscriptions -

None of the Above -

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.

EDIT CART HEADER

Last Updated on: 7/21/2021

The screenshot shows the 'Shopping Cart' header in the ECU Materials Management system. Callout 8 points to the 'Backup Required' checkbox, which is checked. Callout 9 points to the 'Special Instructions' dropdown menu, which is set to 'None'. Callout 10 points to the 'Notes to Suppliers' text box, which is empty. The header includes a search bar, a 'Business Purpose / Note to Approvers' field with a character count, and a 'Grant will expire on' date field. The cart contains 5 items from Hastings Ford Inc. with a total value of 53,265.65 USD. A 'Proceed To Checkout' button is visible in the top right corner.

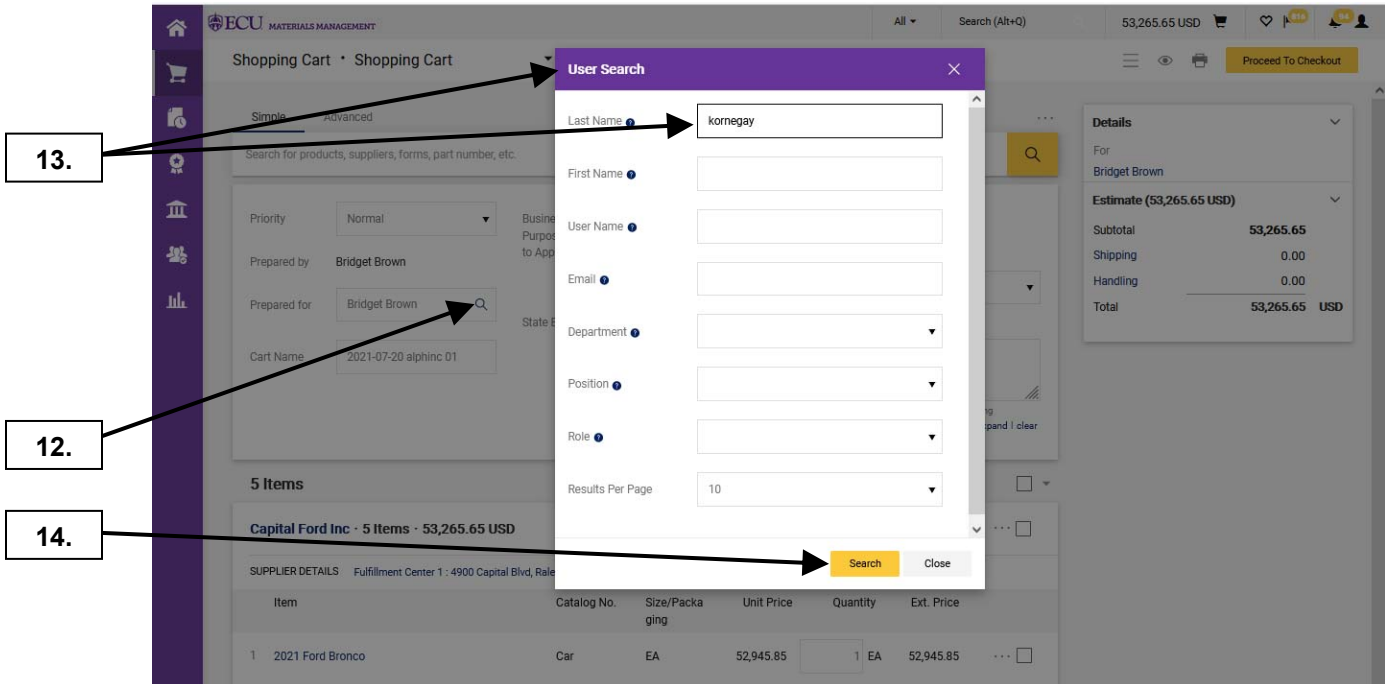
8. Select the **Backup Required** check box to indicate that the supplier will require backup with the PO.
9. Select the appropriate option for **Special Instructions**: Check Attached, Confirming Order - Do Not Send, or None.
10. If appropriate, enter comments in **Notes to Suppliers** text box

The screenshot shows the 'Shopping Cart' header after changes have been made. Callout 11 points to a green notification banner that says 'All changes saved'. The 'Business Purpose / Note to Approvers' field now contains the text 'The grant for this order will expire on 8/30/2021'. The 'Grant will expire on' date field is now 8/30/2021. The cart now contains 5 items from Capital Ford Inc. with a total value of 53,265.65 USD. The 'Proceed To Checkout' button is highlighted in yellow.

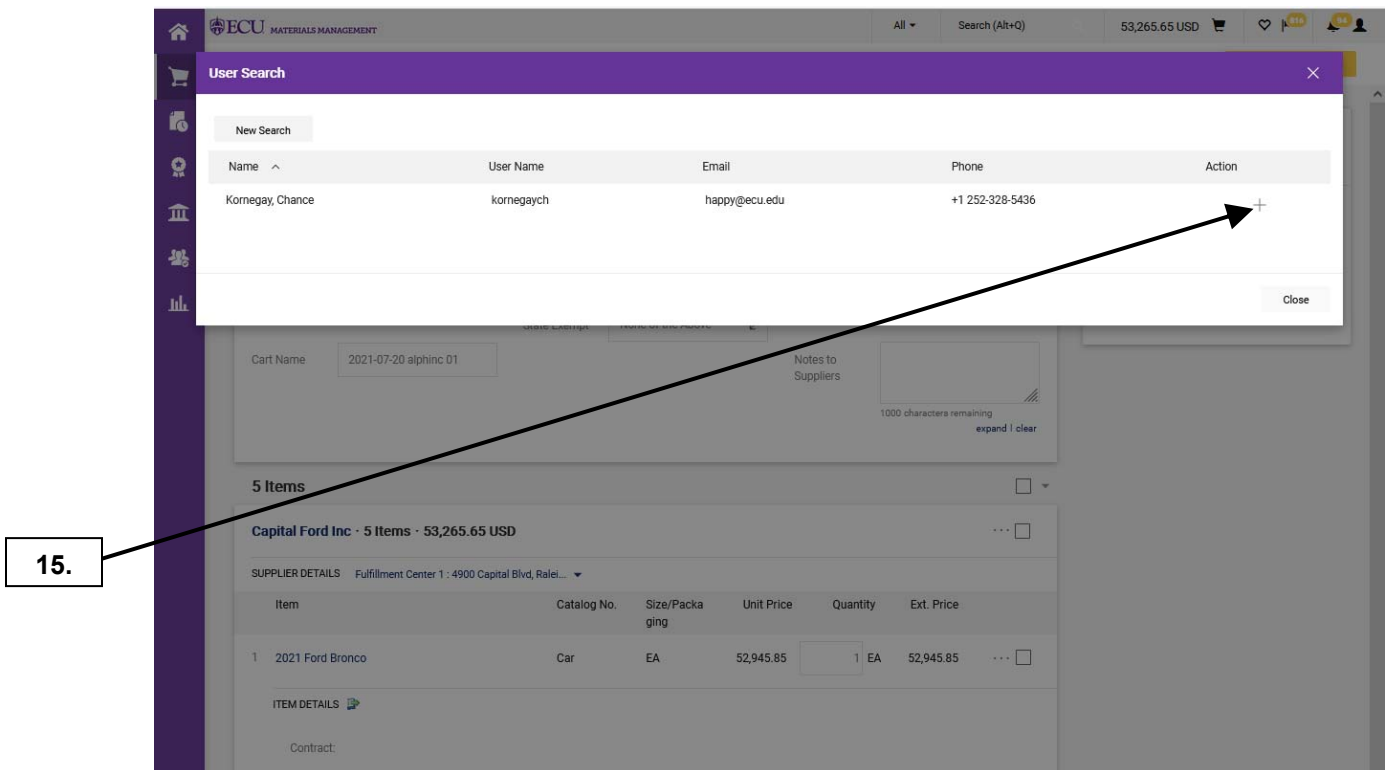
11. Note that any changes to the header are automatically saved See the **Edit Cart Items** procedure to continue the review process. **Steps 12 – 16** take you through the process of preparing a requisition for another requisitioner.

EDIT CART HEADER

Last Updated on: 7/21/2021



- 12. To prepare a requisition for another PORT user, click in **Prepared For** search icon.
- 13. In the **User Search** pop-up, type the PORT standard requisitioner's **Last Name**.
- 14. Click the **Search** button.



- 15. Click on **+** symbol under the **Action** column.

EDIT CART HEADER

Last Updated on: 7/21/2021

16.

Shopping Cart • Shopping Cart

Simple Advanced

Search for products, suppliers, forms, part number, etc.

Priority: Normal

Business Purpose / Note to Approvers: The grant for this order will expire on 8/30/2021

Backup Required:

Prepared by: Bridget Brown

Prepared for: Chance Kornegay

Special Instructions: None

State Exempt: None of the Above

Notes to Suppliers

5 Items

Capital Ford Inc - 5 Items - 53,265.65 USD

SUPPLIER DETAILS Fulfillment Center 1 : 4900 Capital Blvd, Ralel...

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 2021 Ford Bronco	Car	EA	52,945.85	1 EA	52,945.85
2 WeatherTech Floor mats - grey	Mats	EA	79.95	4 EA	319.80

Estimate (53,265.65 USD)

Subtotal: 53,265.65

Shipping: 0.00

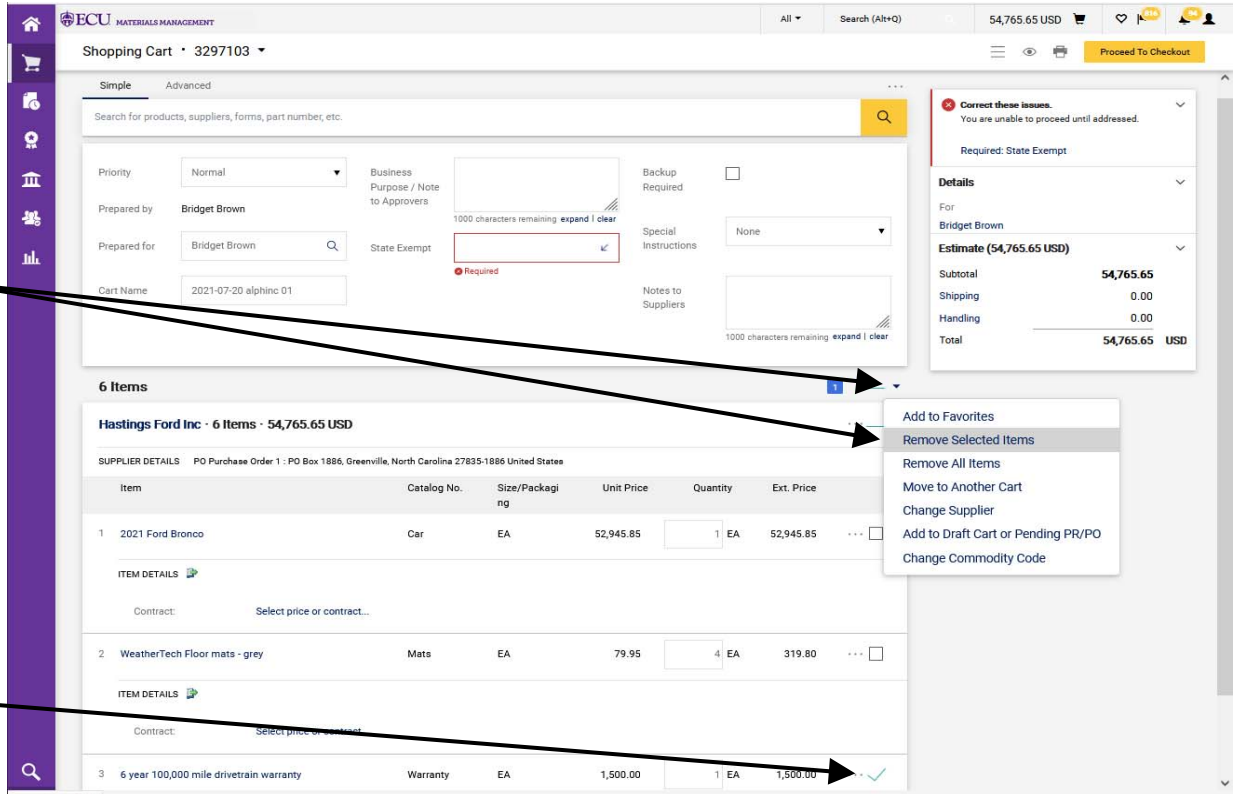
Handling: 0.00

Total: 53,265.65 USD

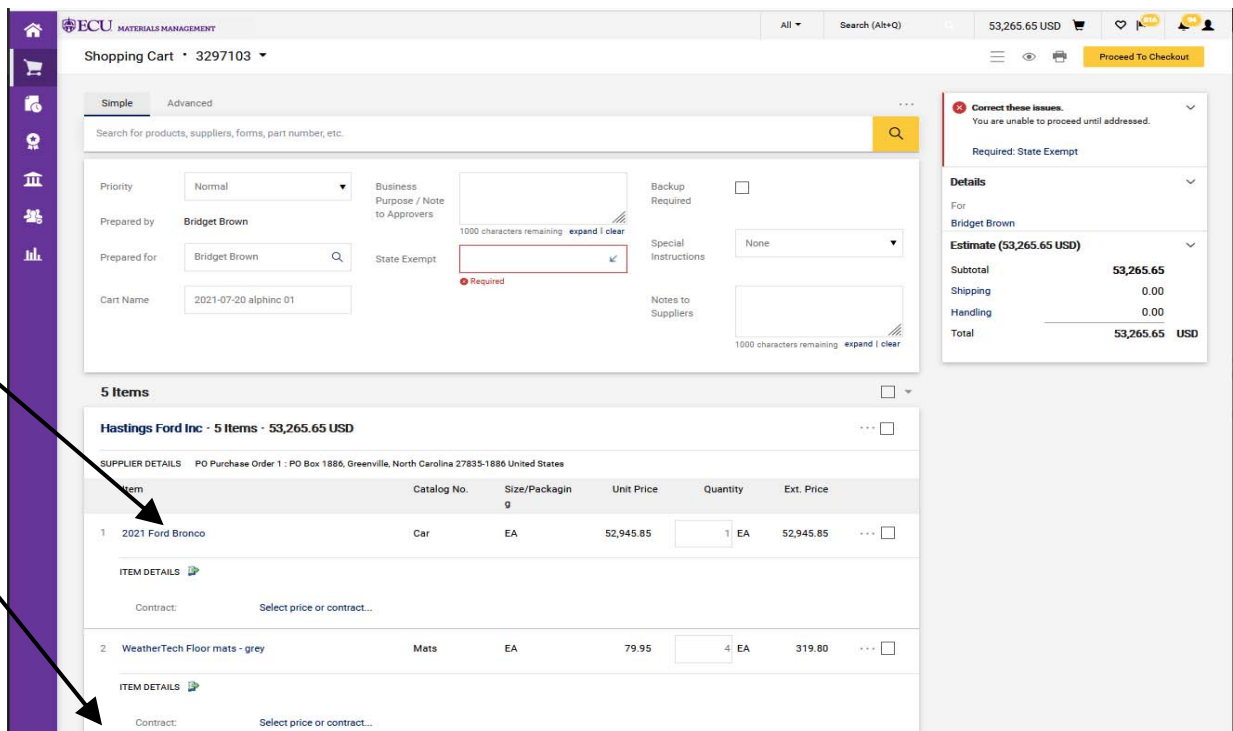
16. The **Prepared for** now indicates the user you selected. **Important Note:** Banner Security will validate Org access against the Prepared for user and they will be responsible for tracking order and completing receiving. See the **Edit Cart Items** procedure to continue the review process.

EDIT CART ITEMS

Last Updated on: 7/21/2021



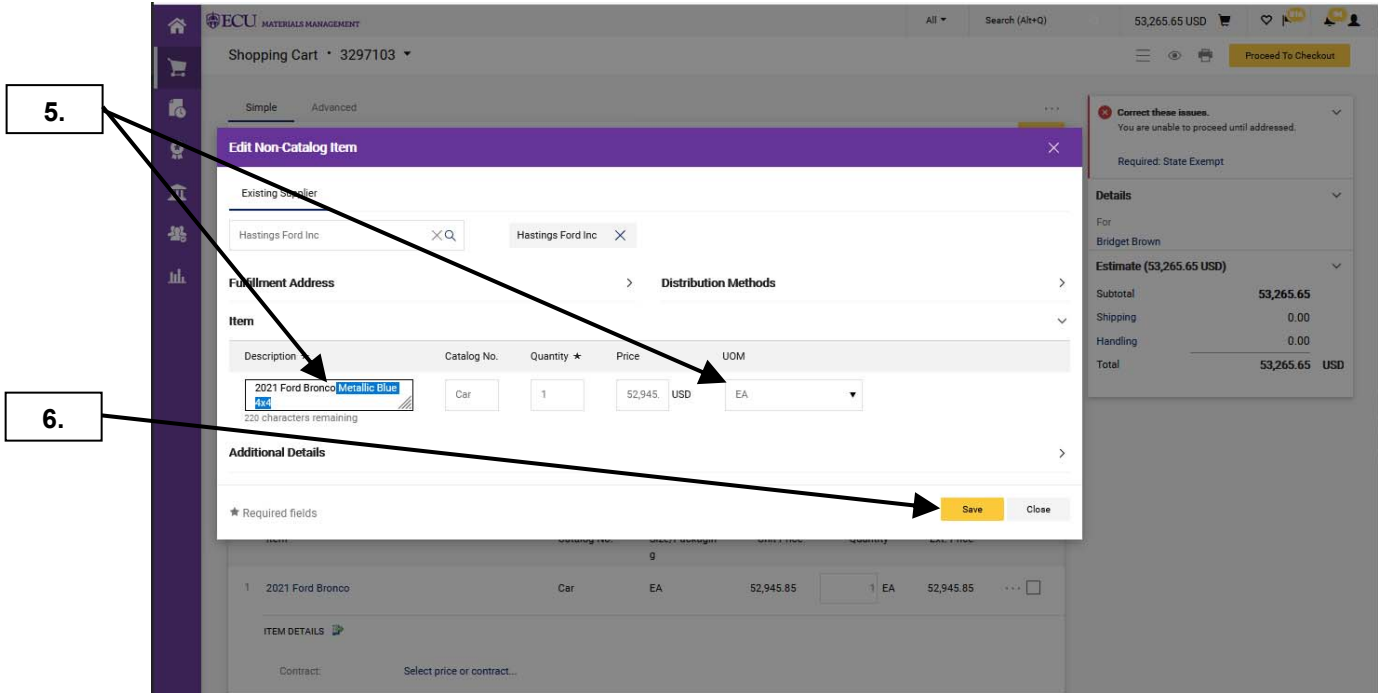
1. To delete an item from a cart, select the check box that corresponds with that item.
2. Click the dropdown triangle and select **Remove Selected Items** option.



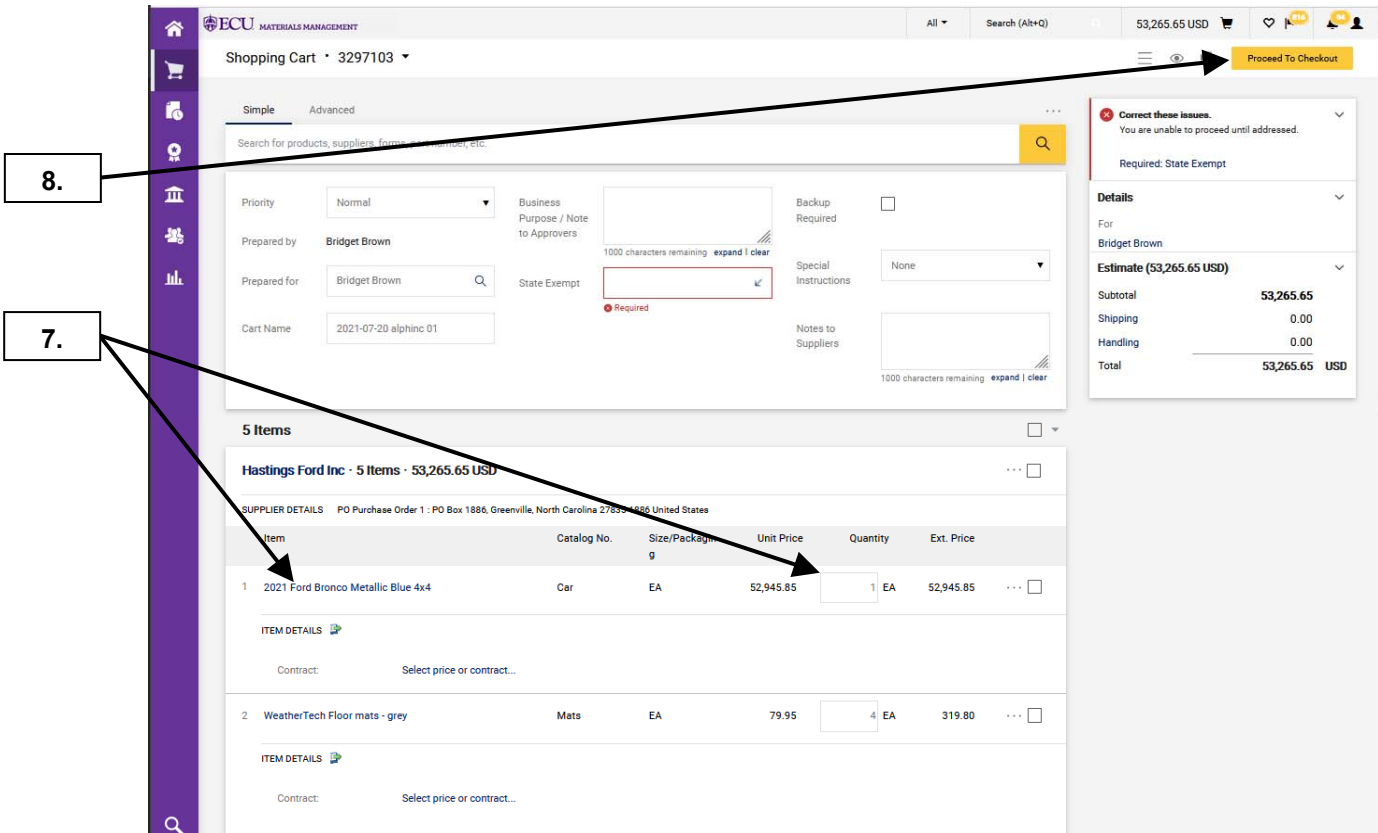
3. **Note:** The line item has been removed from the cart.
4. To edit the line item description, price, quantity, or unit of measure, click on the **Item Description**.
Note: You can **ONLY** change the product description and pricing for **Non-Catalog** orders.

EDIT CART ITEMS

Last Updated on: 7/21/2021



5. Make the appropriate changes to the **Item Description, Catalog No., Quantity, Price, or UOM.**
6. Click on the **Save** button to save the changes to the shopping cart.



7. Note that any changes to **Item Description, Catalog No, UOM, Unit Price, or Quantity** have been updated in the shopping cart.
8. Click on the **Proceed to Checkout** button.

EDIT CART ITEMS

Last Updated on: 7/21/2021

Requisition 3297103

General

Priority: Normal

Department: AF Materials Management (AF Materials Management)

Prepared by: Bridget Brown

Prepared for: Bridget Brown

Cart Name: 2021-07-20 alphinc 01

Accounting Date: no value

Accruals: no value

Internal Note

Internal Info

Business Purpose / Note to Approvers: no value

State Exempt: no value **Required**

Internal Attachments: Add

Order Info

Order Info

Backup Required: **X**

Pricing Ref #: no value

Special Instructions: None

Notes to Suppliers: no value

Attachments for all suppliers: Add

PO Clauses: **3** View details

Bill To

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

FOAPAL / Ship Codes

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

Ship To

Contact Name Bridget Brown
 Phone +1 (252) 328-1013
 Email brown@ecu.edu
 East Carolina University
 Materials Mgmt

Draft

Correct these issues.
 You are unable to proceed until addressed.
 Required: State Exempt

Total (53,265.65 USD)

Subtotal: 53,265.65
 Shipping: 0.00
 Handling: 0.00
53,265.65

What's next for my order?

Next Step: Org (Division) Approval

Approvers: Boulineau, Charles
 Carraway, Kevin
 Steinmetz, Debbie

Workflow

- Draft** (Active) - Bridget Brown
- Banner System Validation** (Future)
- Org (Division) Approval** (Future)
- Banner System Revalidation** (Future)
- Sent to MM - above SK** (Future)

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

CHANGE SUPPLIER ACTION

Last Updated on: 7/21/2021

The screenshot shows the ECU Materials Management interface for a requisition (3297103). The main table lists 5 items from Hastings Ford Inc. with a total value of 53,265.65 USD. A dropdown menu is open over the first item, showing options: Add to Favorites, Remove Selected Items, Remove All Items, Move to Another Cart, Change Supplier (highlighted), Add to Draft Cart or Pending PR/PO, and Change Commodity Code. A 'Draft' sidebar on the right shows a warning: 'Correct these issues. You are unable to proceed until addressed. Required: State Exempt'. A workflow section shows 'Draft' as the active step.

1.

2.

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 the **line items action** drop down arrow and select **Change Supplier**.

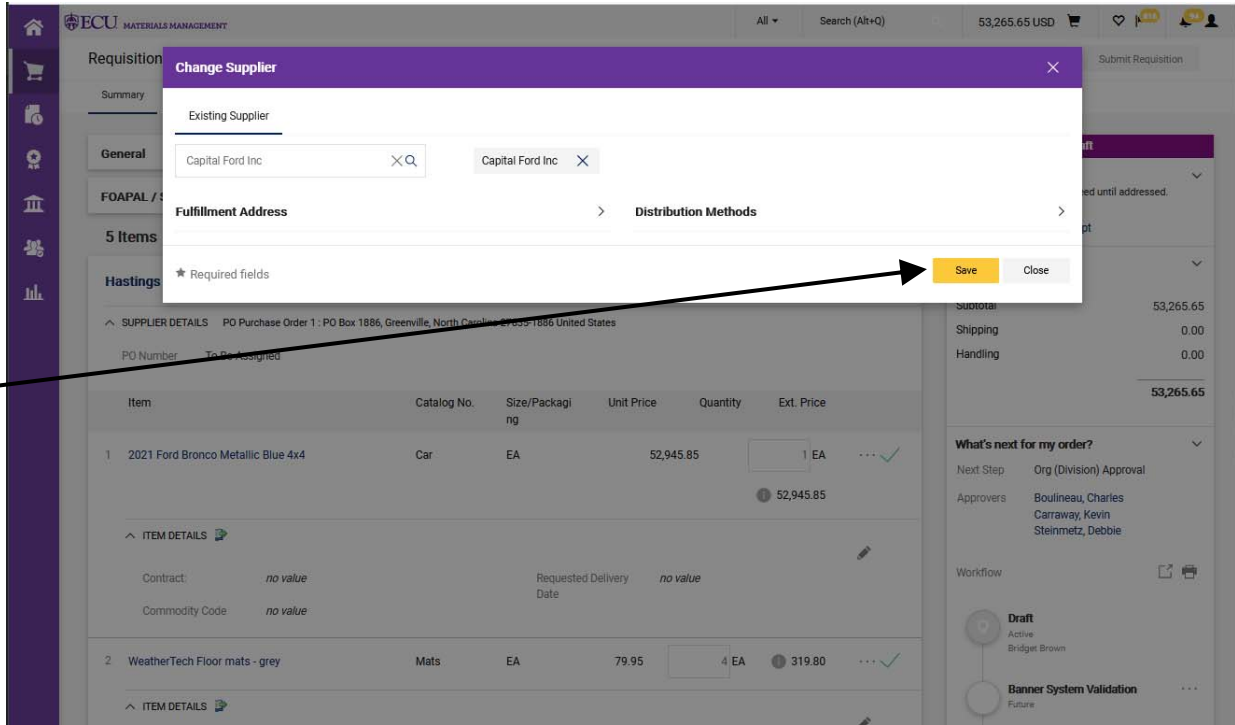
The screenshot shows the 'Change Supplier' pop-up dialog. The search field contains 'Capital Ford Inc'. A dropdown menu shows 'Capital Ford Inc' as the selected option. The dialog has 'Save' and 'Close' buttons. The background shows the same requisition as the previous screenshot, but dimmed.

3.

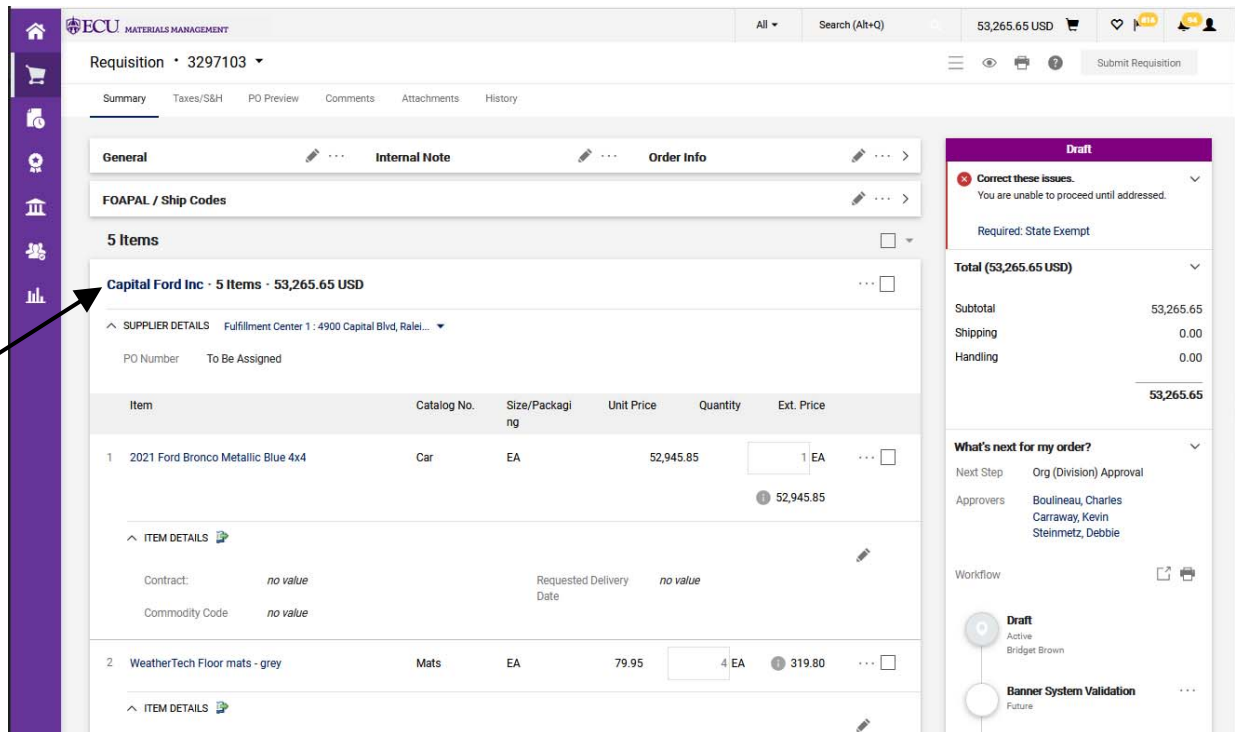
3. Enter the name of the new supplier in the **Exiting Supplier** search field of the **Change Supplier** pop up. Select the desired supplier name.

CHANGE SUPPLIER ACTION

Last Updated on: 7/21/2021



4. Click the **Save** button.



5. The new supplier name is now displayed on the cart / requisition.

6. 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: 7/21/2021

1. To make changes in the Header, click on the corresponding **edit** icon in the following sections: **General**, **Internal Note**, or **Order Info**.

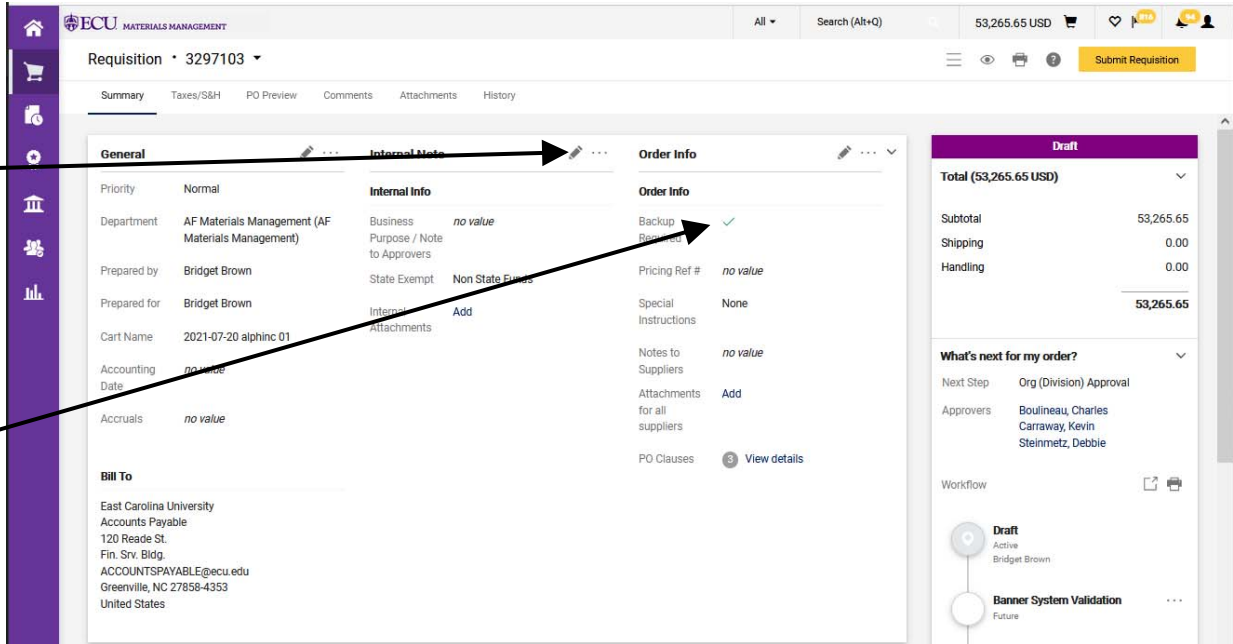
2. In this example, we will change the **Backup Required** flag to Yes by clicking on the **edit** icon in the Order Info section. **Note:** The red **X** indicates that no backup is required for this order.

3. Click on the **Backup Required** check box to indicate that backup documentation is required by the supplier.

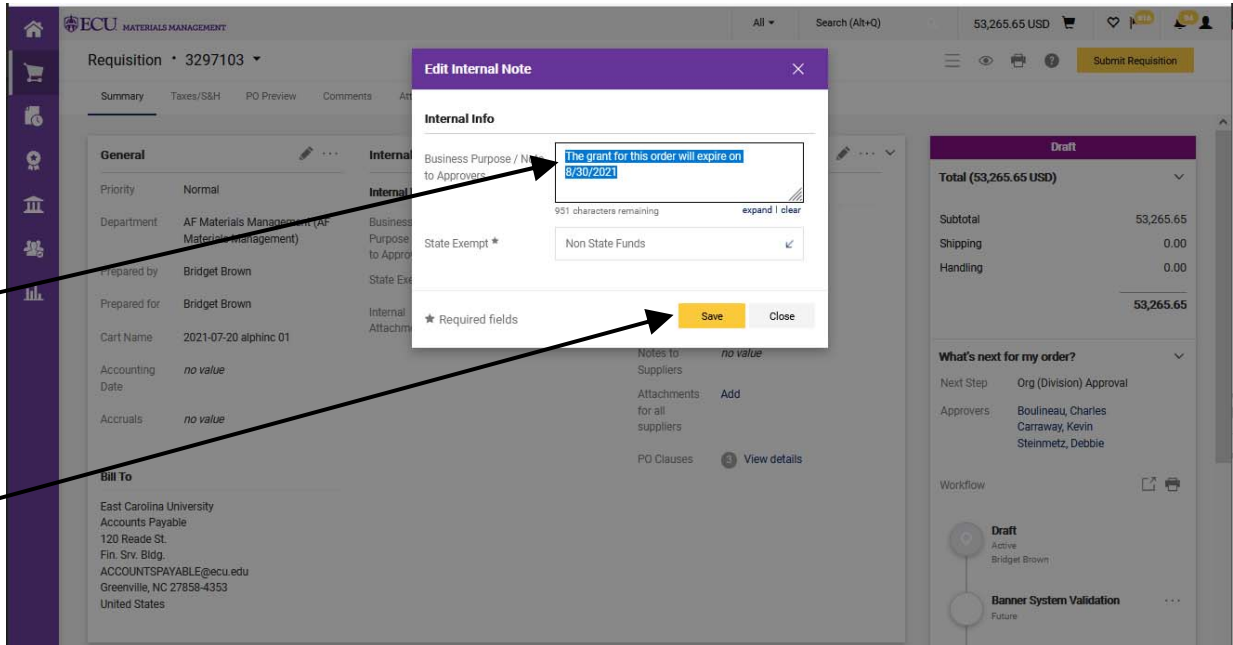
4. Click on the **Save Changes** button to save your change.

REVIEW CART HEADER

Last Updated on: 7/21/2021



- 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** icon.



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

REVIEW CART HEADER

Last Updated on: 7/21/2021

ECU MATERIALS MANAGEMENT | All | Search (Alt+Q) | 53,265.65 USD | Submit Requisition

Requisition 3297103

Summary | Taxes/S&H | PO Preview | Comments | Attachments | History

General	Internal Note	Order Info
Priority: Normal	Internal Info Business Purpose / to Approve: The grant for this order will expire on 8/30/2021	Backup Required: <input checked="" type="checkbox"/>
Department: AF Materials Management (AF Materials Management)	State Exempt: Non State Funds	Pricing Ref #: no value
Prepared by: Bridget Brown	Internal Attachments: Add	Special Instructions: None
Prepared for: Bridget Brown		Notes to Suppliers: no value
Cart Name: 2021-07-20 skmmc 01		Attachments for all suppliers: Add
Accounting Date: no value		PO Clauses: View details
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

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		

Ship To

Draft
Total (53,265.65 USD)
Subtotal: 53,265.65
Shipping: 0.00
Handling: 0.00
Total: 53,265.65

What's next for my order?
Next Step: Org (Division) Approval
Approvers: Bouineau, Charles; Carraway, Kevin; Steinmetz, Debbie

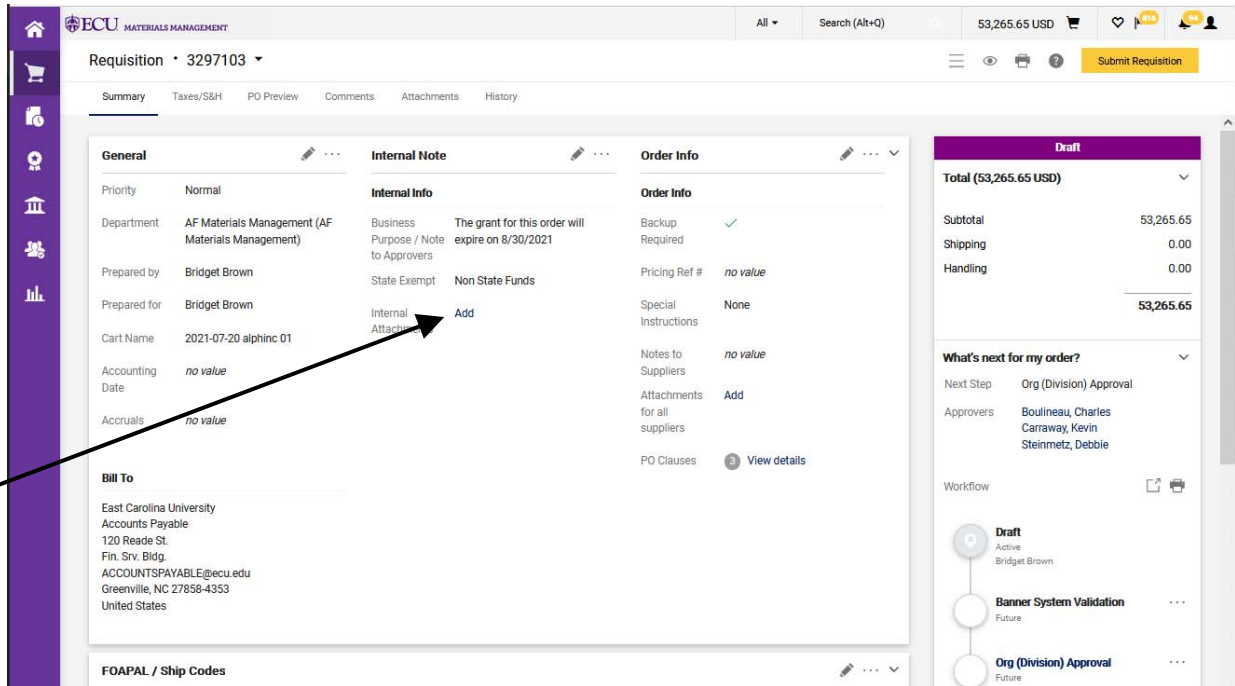
Workflow:
Draft (Active) - Bridget Brown
Banner System Validation (Future)
Org (Division) Approval (Future)
Banner System Revalidation (Future)
Sent to MM - above 5K (Future)

9.

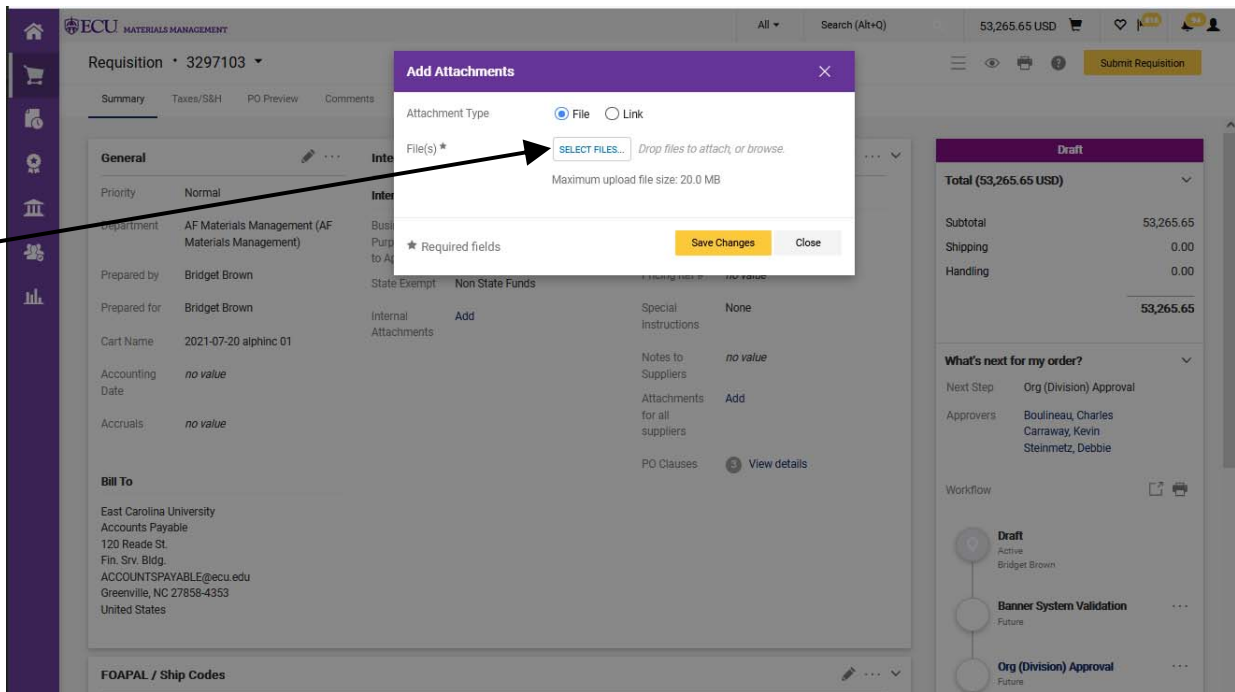
- 9. The Note to Approvers has been updated.
- 10. To edit the FOAPAL at the Header continue to the **FOAPAL EDIT AT HEADER** procedure.

ATTACHMENTS

Last Updated on: 7/21/2021



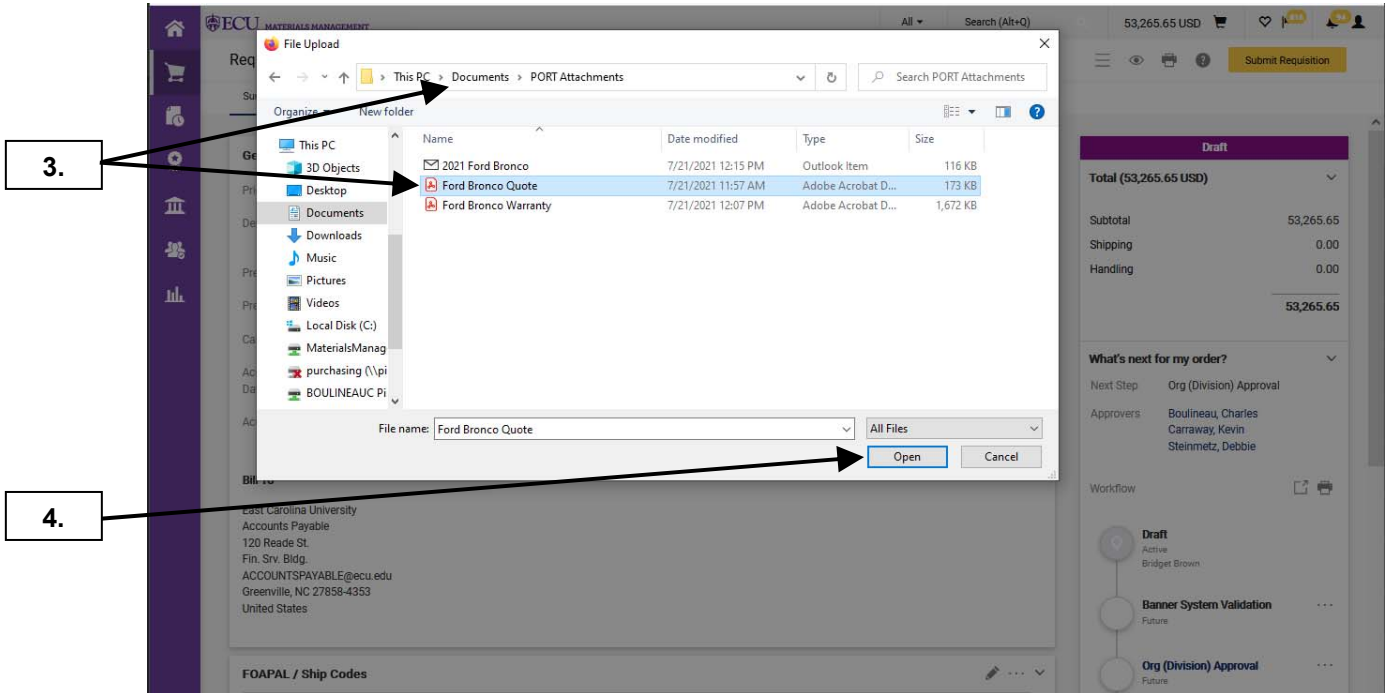
1. To add an attachment, click the **Add** attachment link in the Internal Note section.
Note: These steps are the same for **Attachments for all suppliers**.



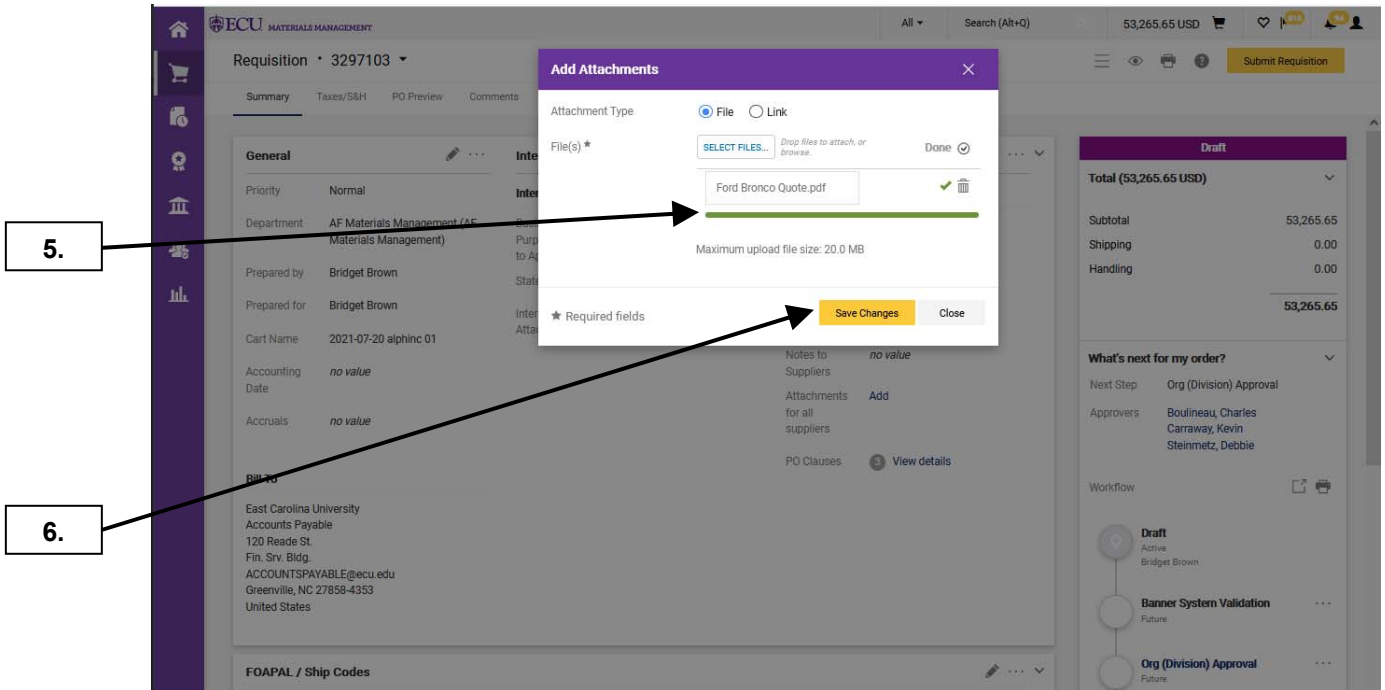
2. Click **Select files** button to navigate to an electronic file on your computer or network drive.
Note: You can attach a file in any of the following formats: Word, Excel, Note Pad, PDF, JPG, TIFF, and email MSG.

ATTACHMENTS

Last Updated on: 7/21/2021



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: 7/21/2021

The screenshot shows the 'Attachments' tab of a requisition. A table lists an attachment: 'Ford Bronco Quote.pdf' with a date of '7/21/2021'. A dropdown menu is open over the attachment, showing options: 'Edit', 'Remove', and 'Move to External Attachments'. A callout box labeled '7.' points to the attachment row, and another callout box labeled '8.' points to the dropdown menu.

Internal Attachments	Date	Add
Ford Bronco Quote.pdf	7/21/2021	...

7. Notice that Internal document has been successfully attached.
8. Click on **Attachment Actions** drop down for a listing of options.
Note: You can either **Remove** or **Move to External Attachments** with one click.

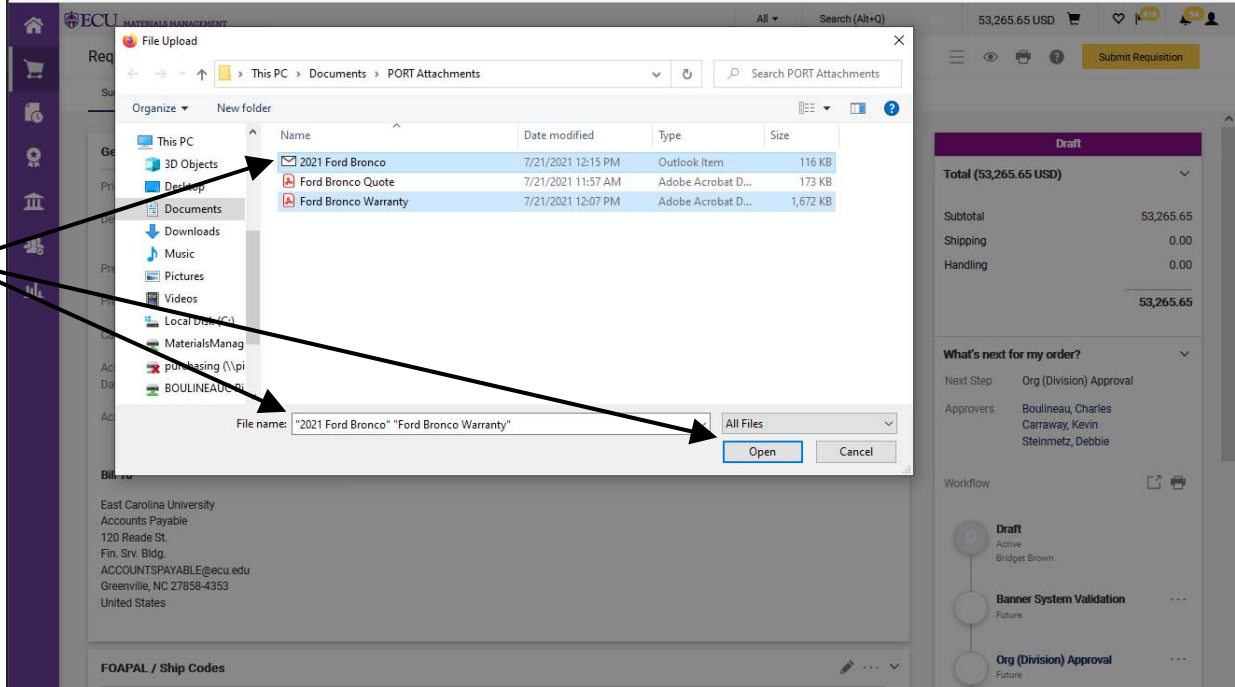
This screenshot is similar to the previous one but shows the 'Add' button in the attachment table. A callout box labeled '9.' points to the 'Add' button.

Internal Attachments	Date	Add
Ford Bronco Quote.pdf	7/21/2021	Add

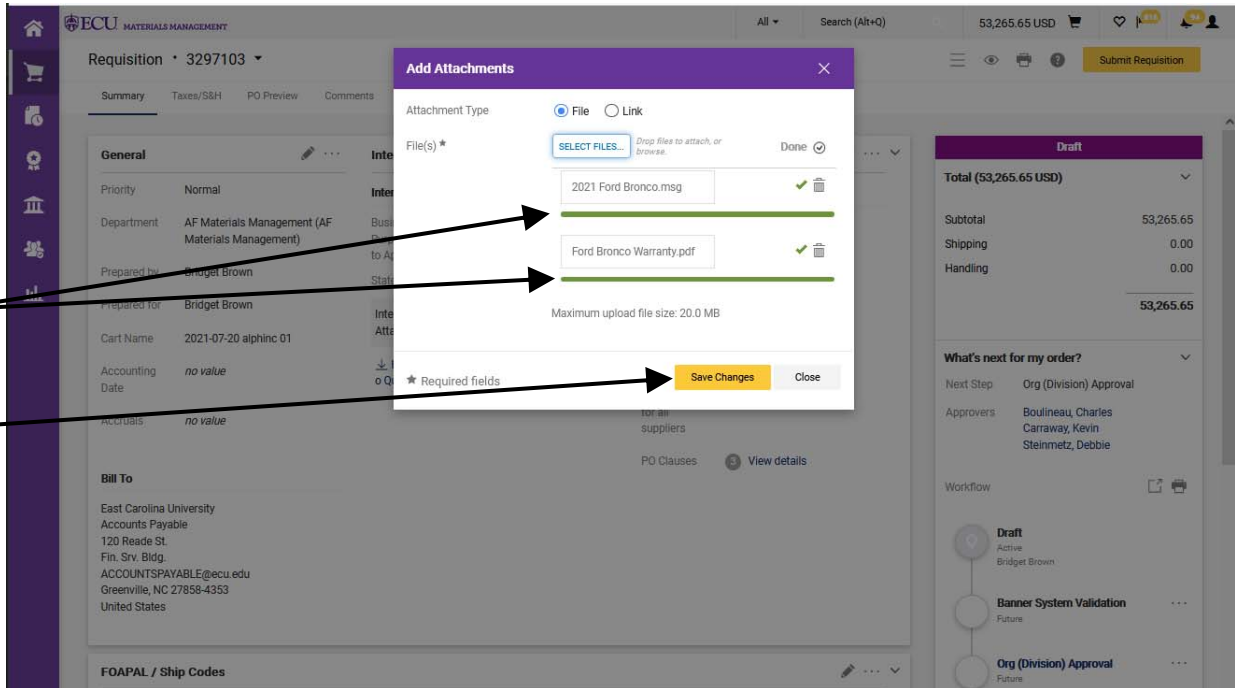
9. To add multiple documents at one time, repeat steps 1 - 2 by clicking on **Add** attachments then **Select files** buttons.

ATTACHMENTS

Last Updated on: 7/21/2021



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



11. Notice status of files uploaded to PORT.
12. Click on the **Save Changes** button.

ATTACHMENTS

Last Updated on: 7/21/2021

The screenshot displays a requisition system interface for 'ECU MATERIALS MANAGEMENT'. The main header shows 'Requisition 3297103' and a 'Submit Requisition' button. The interface is divided into several sections: 'General', 'Internal Note', 'Order Info', and a 'Draft' summary on the right. The 'Internal Note' section contains an 'Internal Info' block with business purpose and state exempt information, and an 'Internal Attachments' table. Two arrows from a box labeled '13.' point to the first two rows of the 'Internal Attachments' table. The 'Draft' summary on the right shows a total of 53,265.65 USD and lists the next steps for the order.

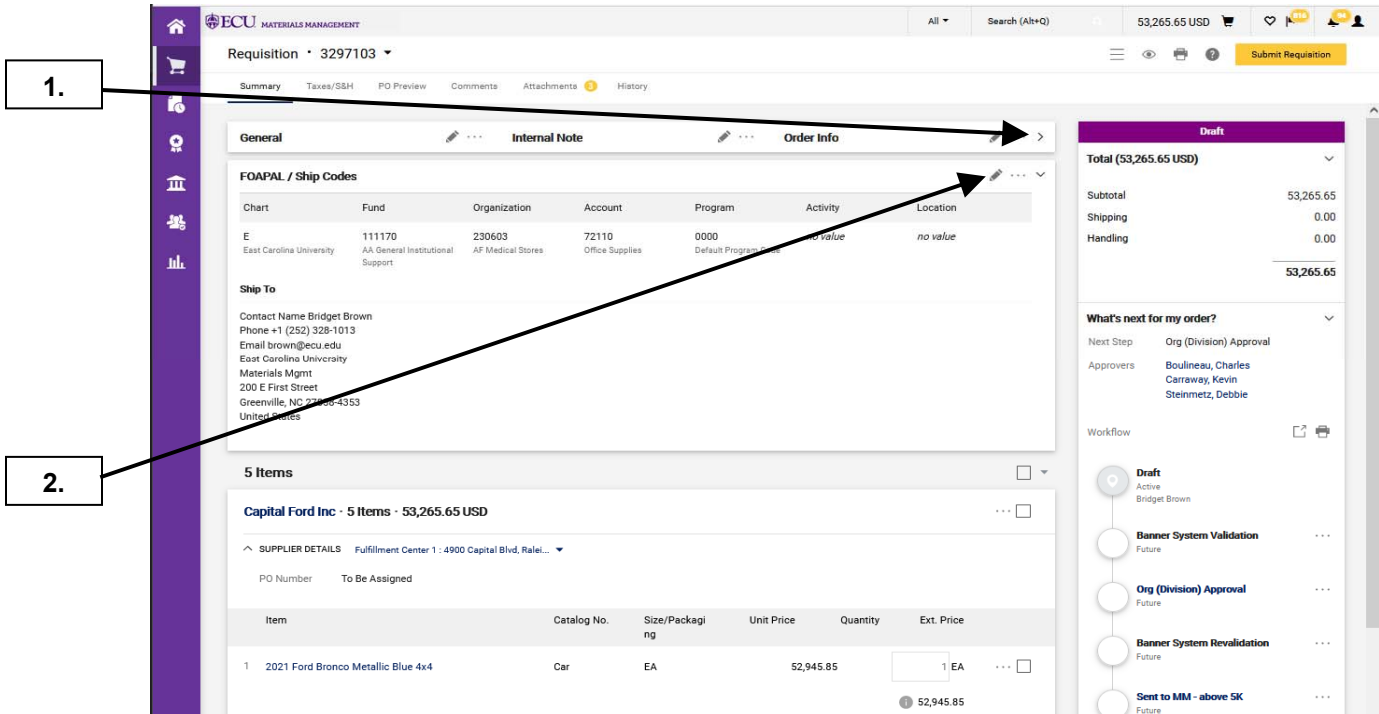
Internal Attachments	Date	Add
Ford Bronco Warranty.pdf	7/21/2021	...
2021 Ford Bronco.msg	7/21/2021	...
Ford Bronco Quote.pdf	7/21/2021	...

13.

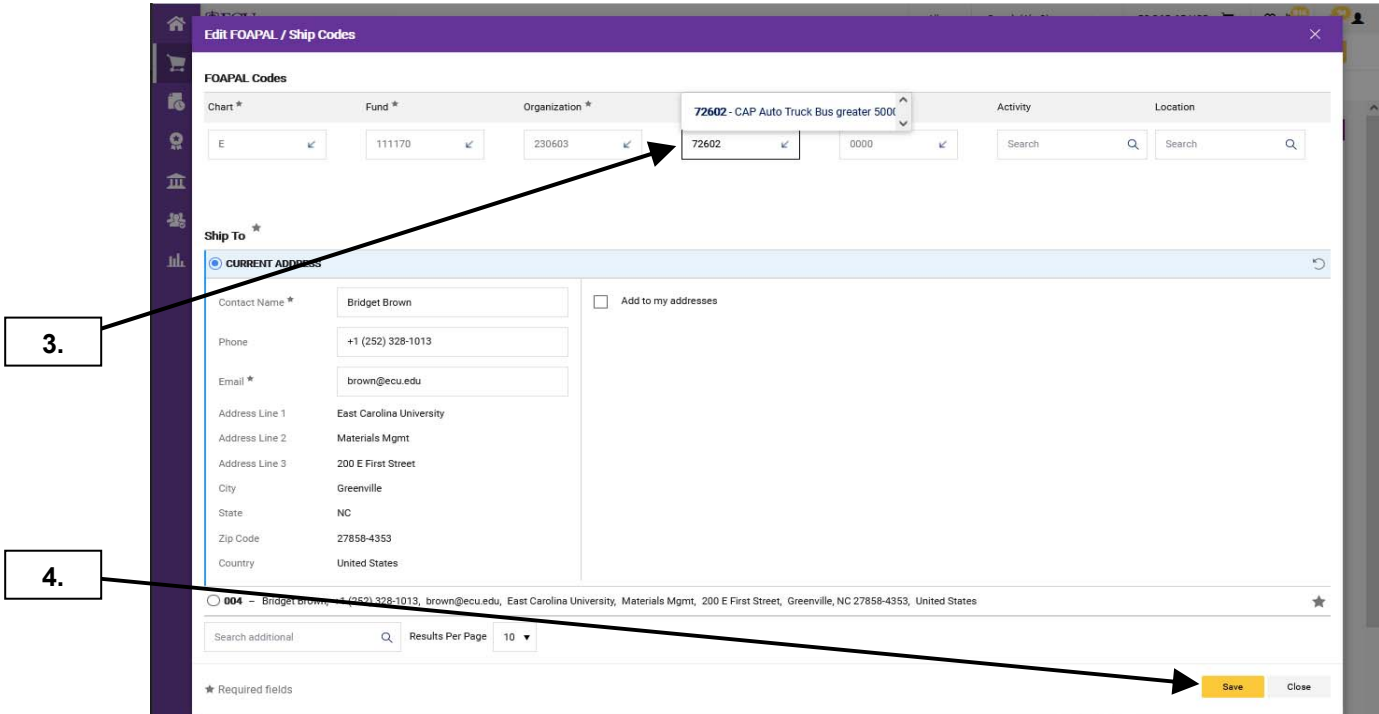
- 13. Notice the attachments are added to the shopping cart.
- 14. This completes all attachment edits. See the **Review Cart Items** procedure to continue the review process.

FOAPAL EDIT AT HEADER

Last Updated on: 7/21/2021



1. Collapse the **General** section of your draft requisition or scroll down the document to the **FOAPAL / Ship Codes** section to make document level changes for FOAPAL codes.
2. To make FOAPAL changes at the document level (every line item), click the **edit** icon.



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: 7/21/2021

Requisition 3297103

Summary Taxes/SSH PO Preview Comments Attachments History

General Internal Note Order Info

FOAPAL / Ship Codes

Chart	Fund	Organization	Account	Program	Activity	Location
E	111170	230603	72602	0000	no value	no value

Ship To

Contact Name Bridget Brown
Phone +1 (252) 328-1013
Email brown@ecu.edu
East Carolina University
Materials Mgmt
200 E First Street
Greenville, NC 27858-4353
United States

5 Items

Capital Ford Inc - 5 Items - 53,265.65 USD

SUPPLIER DETAILS Fulfillment Center 1 : 4900 Capital Blvd, Raleigh, NC

PO Number To Be Assigned

Item Catalog No. Size/Packaging Unit Price Quantity Ext. Price

Draft

Total (53,265.65 USD)

Subtotal 53,265.65
Shipping 0.00
Handling 0.00
53,265.65

What's next for my order?

Next Step Org (Division) Approval

Approvers Boulineau, Charles
Carraway, Kevin
Steinmetz, Debbie

Workflow

Draft Active Bridget Brown

Banner System Validation Future

Org (Division) Approval Future

Banner System Revalidation Future

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** icon.

Edit FOAPAL / Ship Codes

FOAPAL Codes

Chart *	Fund *	Organization *	Account *	Program *	Activity	Location
E	111170	230603	72602	0000	Search	Search

Ship To *

CURRENT ADDRESS

Contact Name * Bridget Brown Add to my addresses

Phone +1 (252) 328-1013

Email * brown@ecu.edu

Address Line 1 East Carolina University

Address Line 2 Materials Mgmt

Address Line 3 200 E First Street

City Greenville

State NC

Zip Code 27858-4353

Country United States

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

Search additional Results Per Page 10

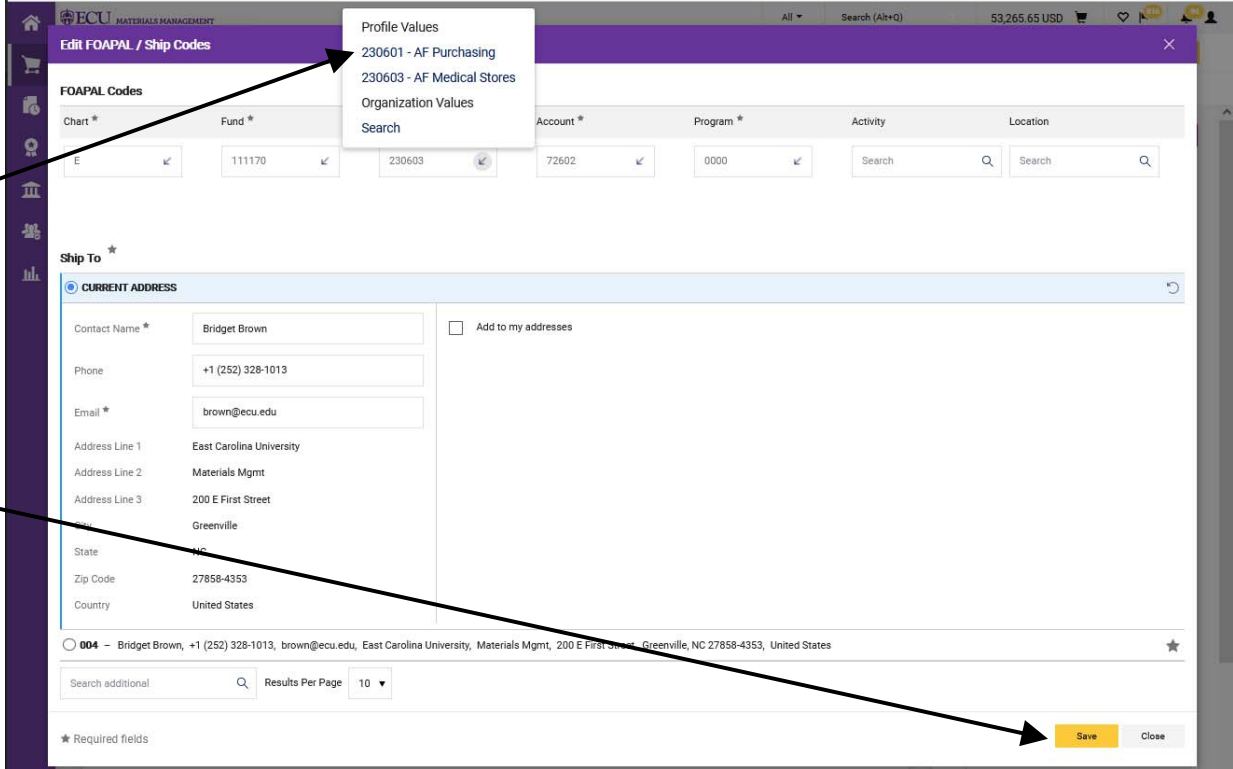
* Required fields

Save Close

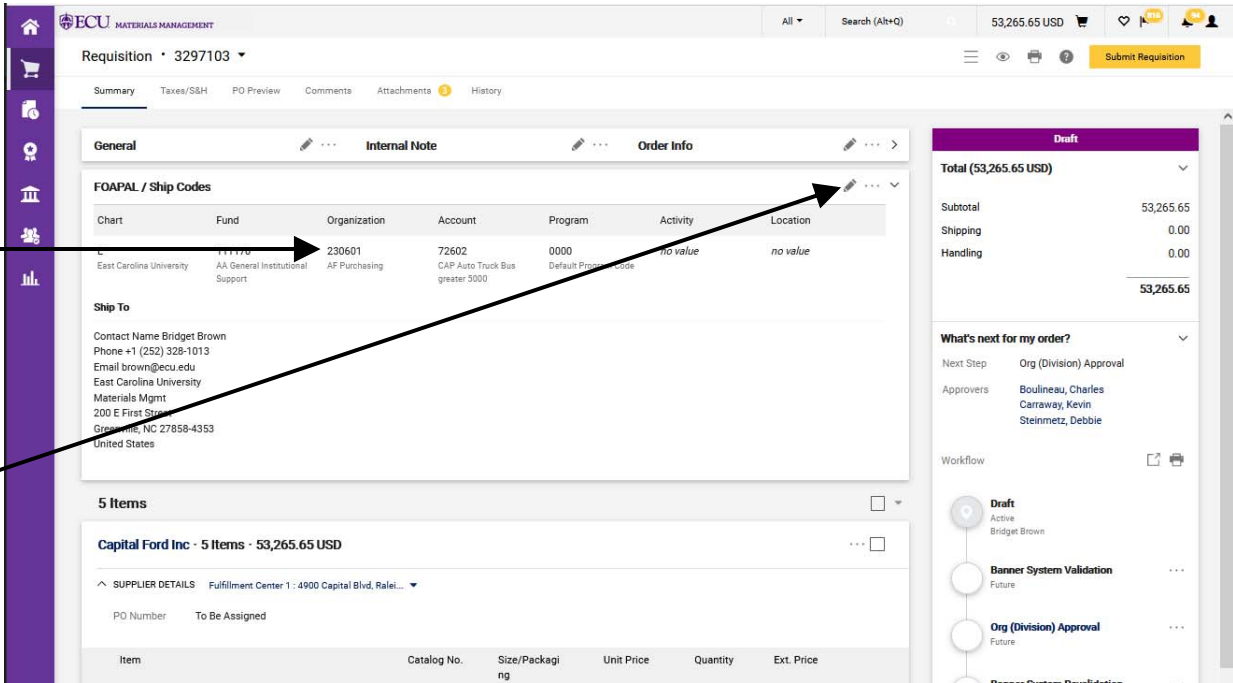
7. Click the **search values** icon to display a list of previously saved values from your profile.

FOAPAL EDIT AT HEADER

Last Updated on: 7/21/2021



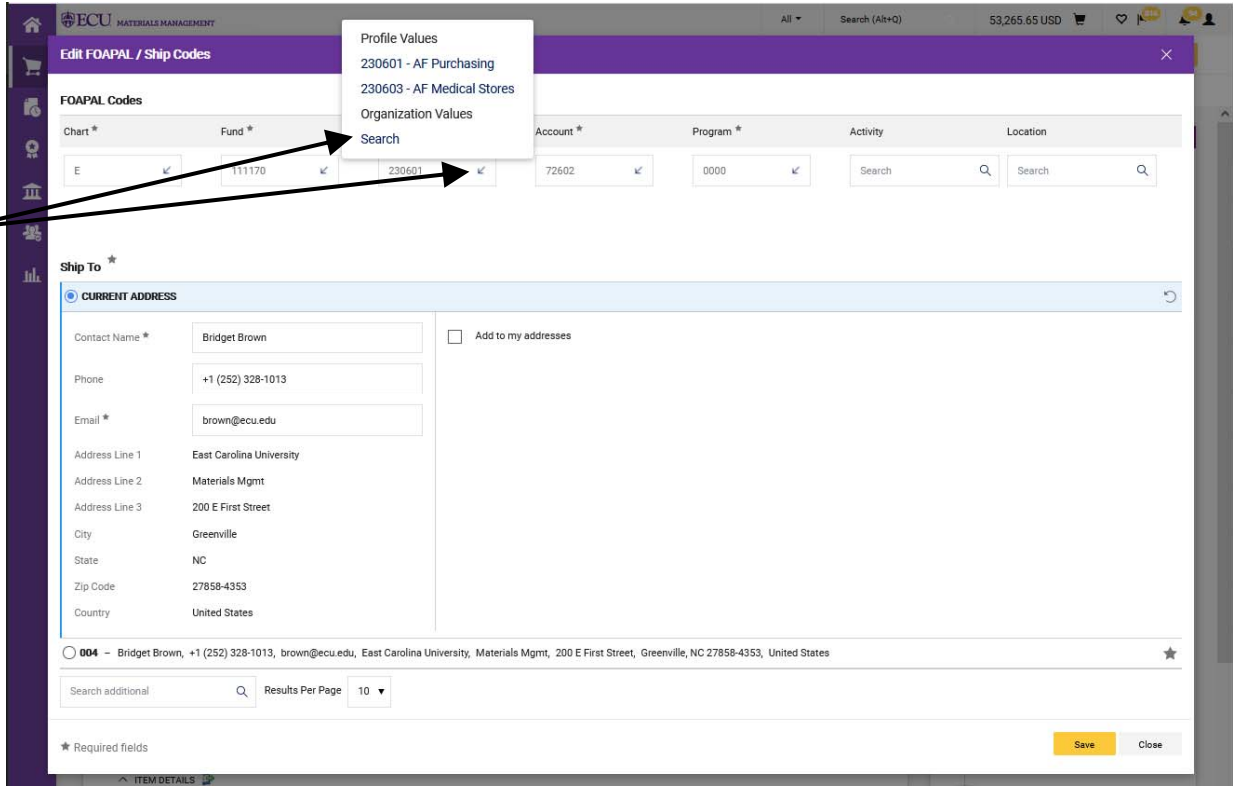
- 8. Click the appropriate value from your profile.
- 9. Click the **Save** button to make your change.



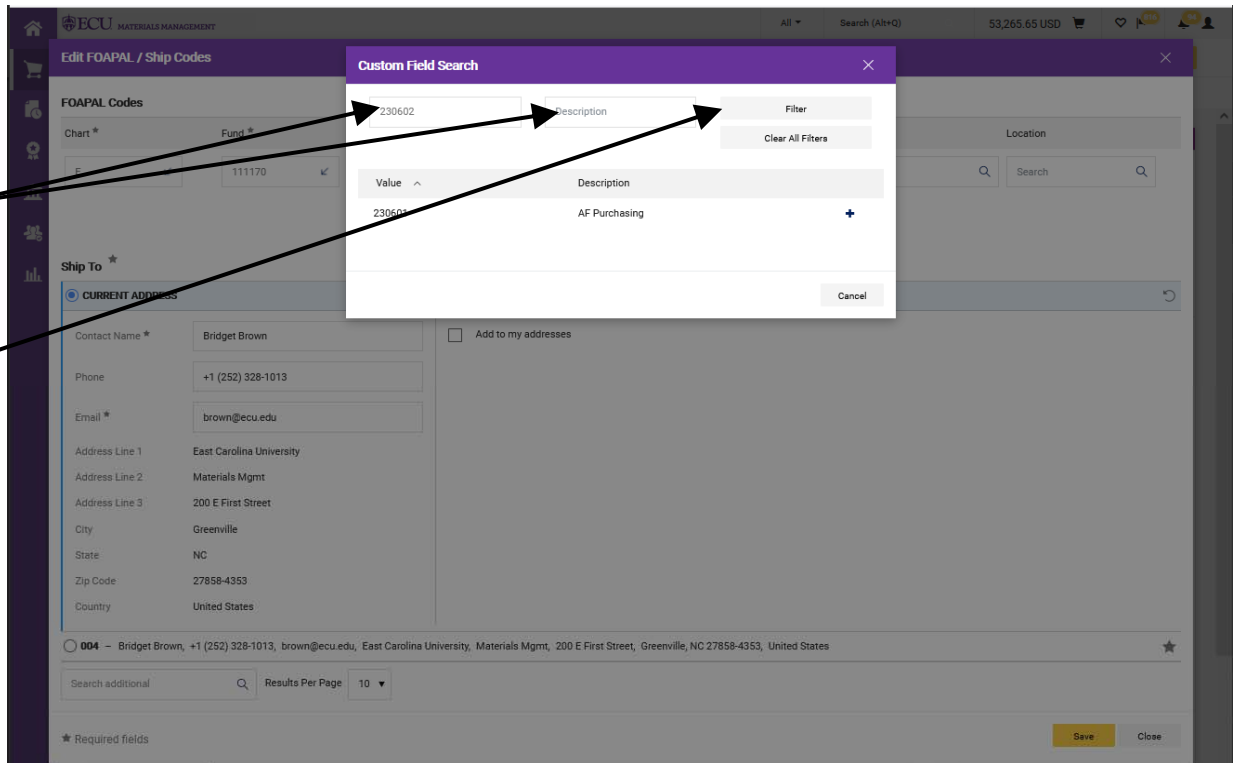
- 10. Notice the Organization value and description have been updated.
- 11. The change that was just completed demonstrates how to search for a value on your profile. Now we are going to search for all Organization values to find one that does not exist on your profile. Click on the **edit** icon.

FOAPAL EDIT AT HEADER

Last Updated on: 7/21/2021



12. From the search values fly-out list click on the **Search** option.

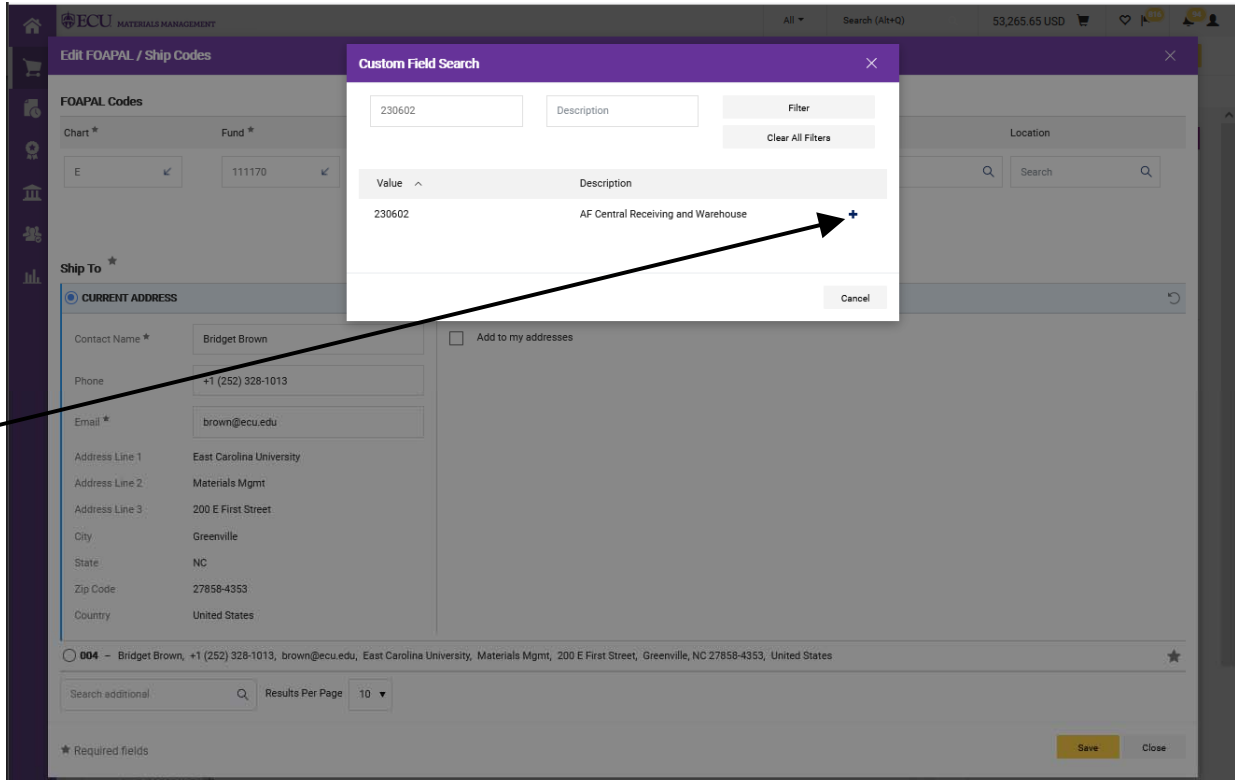


13. This brings up the **Custom Field Search** window. Type in an Organization value or description that does not exist on your profile.

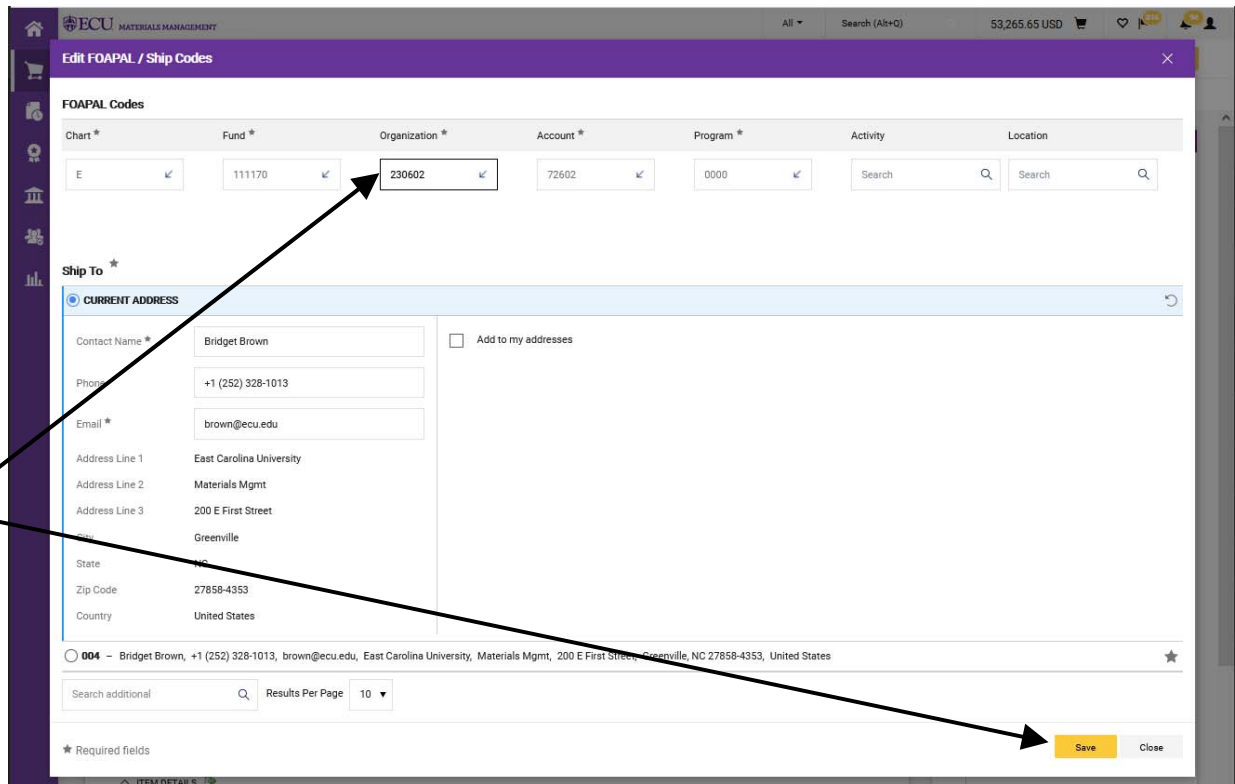
14. Click the **Filter** button.

FOAPAL EDIT AT HEADER

Last Updated on: 7/21/2021



15. Click the add (+) link.



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

FOAPAL EDIT AT HEADER

Last Updated on: 7/21/2021

17.

Chart	Fund	Organization	Account	Program	Activity	Location
E East Carolina University	111170 AA Research and Support	230602 AF Central Receiving and Warehouse	72602 CAP Auto Truck Bus greater 5000	0000 Default Program Code	no value	no value

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	2021 Ford Bronco Metallic Blue 4x4	Car	EA	52,945.85	1 EA 52,945.85

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

FOAPAL SPLIT – % OF PRICE AT HEADER

Last Updated on: 7/21/2021

Shopping Cart • 3297103

Proceed To Checkout

Details

For Bridget Brown

Estimate (53,265.65 USD)

Subtotal	53,265.65
Shipping	0.00
Handling	0.00
Total	53,265.65 USD

5 Items

Capital Ford Inc • 5 Items • 53,265.65 USD

SUPPLIER DETAILS Fulfillment Center 1 : 4900 Capital Blvd, Raleigh...

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 2021 Ford Bronco Metallic Blue 4x4	Car	EA	52,945.85	1 EA	52,945.85
2 WeatherTech Floor mats - grey	Mats	EA	79.95	4 EA	319.80

ITEM DETAILS

Contract:

1.

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

Requisition • 3297103

Submit Requisition

Summary Taxes/SSH PO Preview Comments Attachments History

General

Priority Normal

Department AF Materials Management (AF Materials Management)

Prepared by Bridget Brown

Prepared for Bridget Brown

Cart Name 2021-07-20 alphinc 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

Internal Note

Internal Info

Business Purpose / Note to Approvers Show more

State Exempt Non State Funds

Internal Attachments

Attachments	Date	Add
↓ Ford Bronco Warranty.pdf	7/21/2021	...
↓ 2021 Ford Bronco.msg	7/21/2021	...
↓ Ford Bronco Quote.pdf	7/21/2021	...

Order Info

Order Info

Backup Required ✓

Pricing Ref # no value

Special Instructions None

Notes to Suppliers no value

Attachments for all suppliers Add

PO Clauses 3 View details

Draft

Total (53,265.65 USD)

Subtotal	53,265.65
Shipping	0.00
Handling	0.00
	53,265.65

What's next for my order?

Next Step Org (Division) Approval

Approvers Boulineau, Charles
Carraway, Kevin
Steinmetz, Debbie

Workflow

- Draft Active Bridget Brown
- Banner System Validation Future
- Org (Division) Approval Future
- Banner System Revalidation Future
- Sent to MM - above SK Future

FOAPAL / Ship Codes

Chart	Fund	Organization	Account	Program	Activity	Location
E	111170	230602	72602	0000	no value	no value
East Carolina University	AA General Institutional Support	AF Central Receiving and Warehouse	CAP Auto Truck Bus greater 5000	Default Program Code		

Ship To

2.

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

FOAPAL SPLIT – % OF PRICE AT HEADER

Last Updated on: 7/21/2021

3.

- Click **add split** icon (+) for each FOAPAL string needed for the header split. In this example, we will have 4 splits.

4.

Chart *	Fund *	Organization *	Account *	Program *	Activity	Location	% of Price
E	111170	230602	72602	0000	Search	Search	25 (13,316.41 USD)
E	111170	230601	72602	0000	Search	Search	15 (7,989.85 USD)
E	111170	230603	72602	0000	Search	Search	40 (21,306.26 USD)
E	111170	230604	72602	0000	Search	Search	20 (10,653.13 USD)
							Split Total 100% (53,265.65 USD)

5.

6.

- Make the appropriate changes to each FOAPAL string for the % of Price Split.
- Enter the % for each line FOAPAL split.
Note: Total % must equal 100% and the total for each split is indicated in parentheses.
- Click **Save Changes** button to return to your **Summary – Draft Cart**.

FOAPAL SPLIT – % OF PRICE AT HEADER

Last Updated on: 7/21/2021

Requisition · 3297103

Summary Taxes/S&H PO Preview Comments Attachments 5 History

General Internal Note Order Info

FOAPAL / Ship Codes

Chart	Fund	Organization	Account	Program	Activity	Location	% of Price
E East Carolina University	111170 AA General Institutional Support	230602 AF Central Receiving and Warehouse	72602 CAP Auto Truck Bus greater 3000	0000 Default Program Code	no value	no value	25%
E East Carolina University	111170 AA General Institutional Support	230601 AF Purchasing	72602 CAP Auto Truck Bus greater 3000	0000 Default Program Code	no value	no value	15%
E East Carolina University	111170 AA General Institutional Support	230603 AF Medical Stores	72602 CAP Auto Truck Bus greater 3000	0000 Default Program Code	no value	no value	40%
E East Carolina University	111170 AA General Institutional Support	230604 AF Fixed Assets	72602 CAP Auto Truck Bus greater 3000	0000 Default Program Code	no value	no value	20%

Ship To

Contact Name Bridget Brown
Phone +1 (252) 328-1013
Email brown@ecu.edu
East Carolina University
Materials Mgmt
200 E First Street
Greenville, NC 27858-4353
United States

5 Items

Capital Ford Inc · 5 Items · 53,265.65 USD

SUPPLIER DETAILS Fulfillment Center 1: 4900 Capital Blvd, Raleigh, NC

PO Number To Be Assigned

Item Catalog No. Size/Packag Unit Price Quantity Ext. Price

Draft

Total (53,265.65 USD)

Subtotal 53,265.65
Shipping 0.00
Handling 0.00
53,265.65

What's next for my order?

Next Step Org (Division) Approval

Approvers Boulineau, Charles
Carraway, Kevin
Steinmetz, Debbie

Workflow

Draft Active Bridget Brown

Banner System Validation Future

Org (Division) Approval Future

Banner System Revalidation Future

Sent to MM - above 5K Future

Purchase Transaction Approval Future

7. 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: 7/21/2021

Requisition · 3297103

Summary Taxes/SSH PO Preview Comments Attachments History

General Internal Note Order Info

FOAPAL / Ship Codes

Chart	Fund	Organization	Account	Program	Activity	Location
E	111170	230602	72602	0000	no value	no value
East Carolina University	AA General Institutional Support	AF Central Receiving and Warehouse	CAP Auto Truck Bus greater 3000	Default Program Code		

Ship To

Contact Name Bridget Brown
Phone +1 (252) 328-1013
Email brown@ecu.edu
East Carolina University
Materials Mgmt
200 E First Street
Greenville, NC 27858-4353
United States

Items

Capital Ford Inc - 5 Items · 53,265.65 USD

SUPPLIER DETAILS Fulfillment Center 1: 4900 Capital Blvd, Raleigh, NC

PO Number To Be Assigned

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 2021 Ford Bronco Metallic Blue 4x4	Car	EA	52,945.85	1 EA	52,945.85

Draft

Total (53,265.65 USD)

Subtotal 53,265.65
Shipping 0.00
Handling 0.00
53,265.65

What's next for my order?

Next Step Org (Division) Approval

Approvers Boulineau, Charles
Carraway, Kevin
Steinmetz, Debbie

Workflow

Draft Active Bridget Brown

Banner System Validation Future

Org (Division) Approval Future

Banner System Revalidation Future

Sent to MM - above SK Future

1. Navigate to the FOAPAL / Ship Codes section of your draft requisition. Click on the **edit** icon to change the **Ship To** code at the Header level (for every line item).

Edit FOAPAL / Ship Codes

FOAPAL Codes

Chart *	Fund *	Organization *	Account *	Program *	Activity	Location
E	111170	230602	72602	0000	Search	Search

Ship To *

CURRENT ADDRESS

Contact Name * Bridget Brown Add to my addresses

Phone +1 (252) 328-1013

Email * brown@ecu.edu

Address Line 1 East Carolina University

Address Line 2 Materials Mgmt

Address Line 3 200 E First Street

City Greenville

State NC

Zip Code 27858-4353

Country United States

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

000 - Bridget Brown, +1 252-328-1013, happymail@ecu.edu, East Carolina University, One Card System, Greenville, NC 278584353, United States

Search additional Results Per Page 10

Save Close

2. The default ship code on your profile will be used as the Current Address unless changed. For the 1st example, we will select an alternate address from our profile values by checking the **Radio** button.

EDIT SHIP TO – CART HEADER

Last Updated on: 7/21/2021

Edit FOAPAL / Ship Codes

FOAPAL Codes

Chart *	Fund *	Organization *	Account *	Program *	Activity	Location
E	111170	230602	72602	0000	Search	Search

Ship To *

Current Address – Bridget Brown, +1 (252) 328-1013, brown@ecu.edu, East Carolina University, Materials Mgmt, 200 E First Street, Greenville, NC 27858-4353, United States

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

642

Attention: * Bridget Brown Nickname * 642

Phone: * +1 252-328-1013 Make default

Email: * happymail@ecu.edu

Address Line 1 East Carolina University

Address Line 2 One Card System

City Greenville

State NC

Zip Code 278584353

Country United States

Search additional Results Per Page 10

★ Required fields Save Close

3. Modify the contact information if necessary.
4. Click the **Save** button to update the Ship To.

Requisition • 3297103

Summary Taxes/S&H PO Preview Comments Attachments History

General **Internal Note** **Order Info**

FOAPAL / Ship Codes

Chart	Fund	Organization	Account	Program	Activity	Location
E	111170	230602	72602	0000	no value	no value
East Carolina University	AA General Institutional Support	AF Central Receiving and Warehouse	CAP Auto Truck Bus greater 5000	Default Program Code		

Ship To

Attention: Bridget Brown
Phone: +1 252-328-1013
Email: happymail@ecu.edu
East Carolina University
One Card System
Greenville, NC 278584353
United States

5 Items

Capital Ford Inc - 5 Items - 53,265.65 USD

SUPPLIER DETAILS Fulfillment Center 1: 4900 Capital Blvd, Raleigh, NC 27606

PO Number To Be Assigned

Draft

Total (53,265.65 USD)

Subtotal	53,265.65
Shipping	0.00
Handling	0.00
Total	53,265.65

What's next for my order?

Next Step Org (Division) Approval

Approvers Boulineau, Charles
Brown, Bridget
Carraway, Kevin
Kornegay, Chance

Workflow

Draft
Active
Bridget Brown

Banner System Validation
Future

5. Notice the **Ship To** address has been updated.
6. **Note:** The change just completed demonstrates how to select a ship code from your profile values. Now we are going to search for all ship codes to find one that does not exist on your profile. Click on **edit** icon.

EDIT SHIP TO – CART HEADER

Last Updated on: 7/21/2021

FOAPAL Codes

Chart *	Fund *	Organization *	Account *	Program *	Activity	Location
E	111170	230602	72602	0000	Search	Search

Ship To *

CURRENT ADDRESS

Attention: * Bridget Brown Add to my addresses

Phone: * +1 252-328-1013

Email: * happymail@ecu.edu

Address Line 1: East Carolina University

Address Line 2: One Card System

City: Greenville

State: NC

005 - Bridget Brown, +1 252-328-1013, happymail@ecu.edu, East Carolina University, VC-Business Affairs, Whi...

1002 - , +1 252-328-1013, happymail@ecu.edu, East Carolina University, Biochemistry Molecular Science, 500...

672 - Bridget Brown, +1 252-328-1013, happymail@ecu.edu, East Carolina University, ITCS, HB Bate, 2005-200...

642 - Bridget Brown, +1 252-328-1013, happymail@ecu.edu, East Carolina University, One Card System, Greenville, NC 278584353, United States

005 Results Per Page 10

★ Required fields Save Close

8.

7.

7. Enter the ship code value in the **Nickname / Address** text box for the 2nd example.
8. Select the appropriate **Ship To Address** from the auto-search suggestions.

Ship To *

Current Address - Bridget Brown, +1 252-328-1013, happymail@ecu.edu, East Carolina University, One Card System, Greenville, NC 278584353, United States

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

642 - Bridget Brown, +1 252-328-1013, happymail@ecu.edu, East Carolina University, One Card System, Greenville, NC 278584353, United States

005 Add to my addresses

Attention: * Bridget Brown

Phone: * +1 252-328-1013

Email: * happymail@ecu.edu

Address Line 1: East Carolina University

Address Line 2: VC-Business Affairs

Address Line 4: Whichard Annex

Room: 217

City: Greenville

State: NC

Zip Code: 278584353

Country: United States

★ Required fields Save Close

9.

10.

11.

9. Change the contact information if appropriate.
10. If you want to add this address to your profile, check the **Add to my addresses** for future use.
11. Click **Save Changes**.

EDIT SHIP TO – CART HEADER

Last Updated on: 7/21/2021

Requisition 3297103

Summary Taxes/SSH PO Preview Comments Attachments History

General Internal Note Order Info

FOAPAL / Ship Codes

Chart	Fund	Organization	Account	Program	Activity	Location
E	111170	230602	72602	0000	no value	no value

Ship To

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

5 Items

Capital Ford Inc - 5 Items - 53,265.65 USD

SUPPLIER DETAILS Fulfillment Center 1: 4900 Capital Blvd, Raleigh, NC 27606

PO Number To Be Assigned

Draft

Total (53,265.65 USD)

Subtotal 53,265.65
Shipping 0.00
Handling 0.00
53,265.65

What's next for my order?

Next Step Org (Division) Approval

Approvers Boulineau, Charles
Brown, Bridget
Carraway, Kevin
Kornegay, Chance

Workflow

Draft Active Bridget Brown

Banner System Validation Future

Org (Division) Approval Future

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

13. Click the **edit** icon.

Note: The final ship code edit will demonstrate steps for finding a ship code with Dept Name criteria.

Edit FOAPAL / Ship Codes

FOAPAL Codes

Chart *	Fund *	Organization *	Account *	Program *	Activity	Location
E	111170	230602	72602	0000	Search	Search

Ship To *

CURRENT ADDRESS

Attention: * Bridget Brown Add to my addresses

Phone: * +1 252-328-1013

Email: * happymail@ecu.edu

Address Line 1 East Carolina University

Address Line 2 VC-Business Affairs

Address Line 4 Whichard Annex

020 - +1 252-328-1013, happymail@ecu.edu, East Carolina University, ITCS, 600 Moye Blvd, Brody, Rm 5...

026 - +1 252-328-1013, happymail@ecu.edu, East Carolina University, Pediatrics, 600 Moye Blvd, Brody, ...

076 - +1 252-328-1013, happymail@ecu.edu, East Carolina University, ITCS, 600 Moye Blvd, Brody, Rm 4...

079 - +1 252-328-1013, happymail@ecu.edu, East Carolina University, Dean's Office, 600 Moye Blvd, Brod...

086 - Bridget Brown, +1 252-328-1013, happymail@ecu.edu, East Carolina University, Student Admissio...

087 - Bridget Brown, +1 252-328-1013, happymail@ecu.edu, East Carolina University, ASCC, 600 Moye Blvd...

088 - Bridget Brown, +1 252-328-1013, happymail@ecu.edu, East Carolina University, CHSC, 600 Moye Blvd...

Brody

Results Per Page 10

Save Close

14. 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.

15. Select the Address from the auto-search result or click the **Search** button to see all results.

EDIT SHIP TO – CART HEADER

Last Updated on: 7/21/2021

17. [Radio button for ship code 026]

16. [Results Per Page dropdown and right arrow navigation icon]

16. You can change the **Results per page** to have more results on each page or advance through the pages by selecting the page navigation icon (>).

17. Check the **Radio button** for the desired ship code.

18. [Contact Name field]

19. [Add to my addresses checkbox]

20. [Save button]

18. Change your contact information if appropriate.

19. If you want to add this address to your profile, check the **Save this address for future use** box.

20. Click the **Save** button.

EDIT SHIP TO – CART HEADER

Last Updated on: 7/21/2021

The screenshot displays the ECU Materials Management interface for a requisition with ID 3297103. The total value is 53,265.65 USD. The 'Ship To' address is highlighted by a callout box labeled '21.'. Below the address, there are 5 items from Capital Ford Inc. with a total value of 53,265.65 USD. The first item is a 2021 Ford Bronco Metallic Blue 4x4, priced at 52,945.85. The right sidebar shows the order status as 'Draft' and lists the next steps, including 'Org (Division) Approval' and 'Banner System Validation'.

21.

General Internal Note Order Info

FOAPAL / Ship Codes

Chart	Fund	Organization	Account	Program	Activity	Location
E	111170	230602	72602	0000	no value	no value
East Carolina University	AA General Institutional Support	AF Central Receiving and Warehouse	CAP Auto Truck Bus greater 5000	Default Program Code		

Ship To

Contact Name Bridget Brown
Phone +1 252-328-1013
Email happymail@ecu.edu
East Carolina University
Pediatrics
600 Moye Blvd
Brody
Rm 3N-44
Greenville, NC 27834
United States

5 Items

Capital Ford Inc - 5 Items - 53,265.65 USD

^ SUPPLIER DETAILS Fulfillment Center 1 : 4900 Capital Blvd, Raleigh, NC 27606

PO Number To Be Assigned

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	2021 Ford Bronco Metallic Blue 4x4	Car	EA	52,945.85	1 EA 52,945.85

Draft

Total (53,265.65 USD)

Subtotal 53,265.65
Shipping 0.00
Handling 0.00
53,265.65

What's next for my order?

Next Step Org (Division) Approval

Approvers Boulineau, Charles
Brown, Bridget
Carraway, Kevin
Kornegay, Chance

Workflow

- Draft Active Bridget Brown
- Banner System Validation Future
- Org (Division) Approval Future
- Banner System Revalidation Future
- Sent to MM - above 5K Future

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

22. 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: 7/20/2021

The screenshot shows the requisition details for requisition 3296928. The 'General' section includes information such as Priority (Normal), Department (AF Materials Management), and Prepared by (Charles Boulineau). The 'FOAPAL / Ship Codes' section is a table with columns for Chart, Fund, Organization, Account, Program, Activity, and Location. A box labeled '1.' has arrows pointing to the expand/collapse icons for the 'General' and 'FOAPAL / Ship Codes' sections.

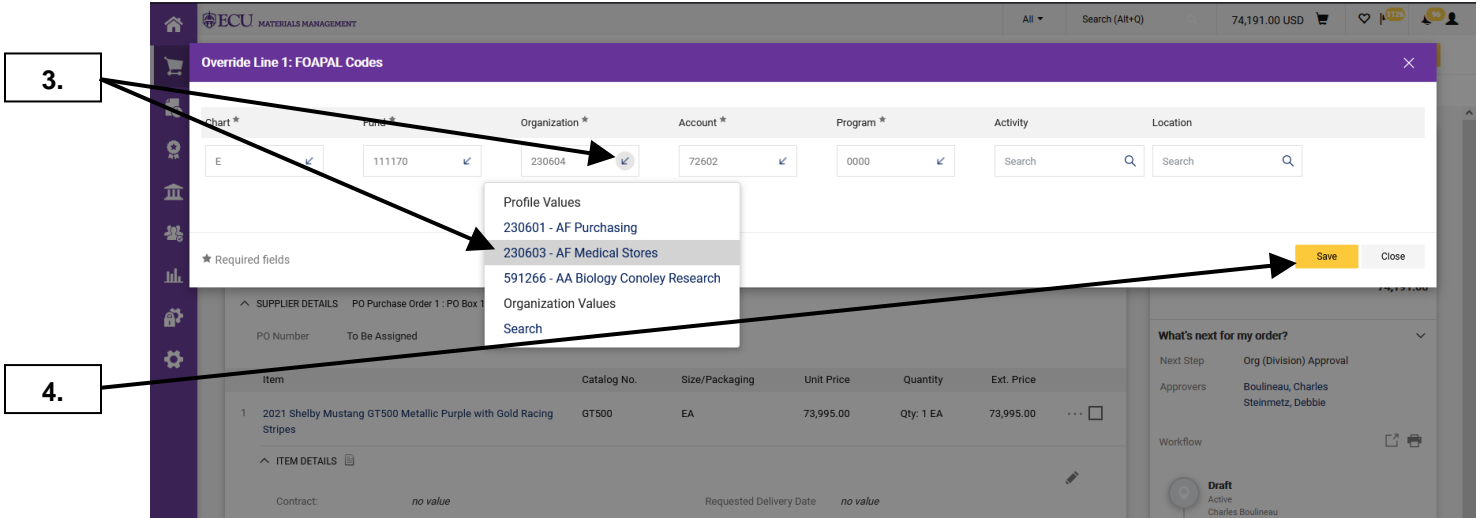
1. To make FOAPAL line item changes, collapse the **General** and **FOAPAL / Ship Codes** sections or scroll down the document to view the **Items** section.

The screenshot shows the 'Items' section of the requisition. The first item is '2021 Shelby Mustang GT500 Metallic Purple with Gold Racing Stripes' with a unit price of 73,995.00. A box labeled '2.' has an arrow pointing to the 'Item Actions' button for this item, which has opened a flyout menu with 'FOAPAL Codes' selected.

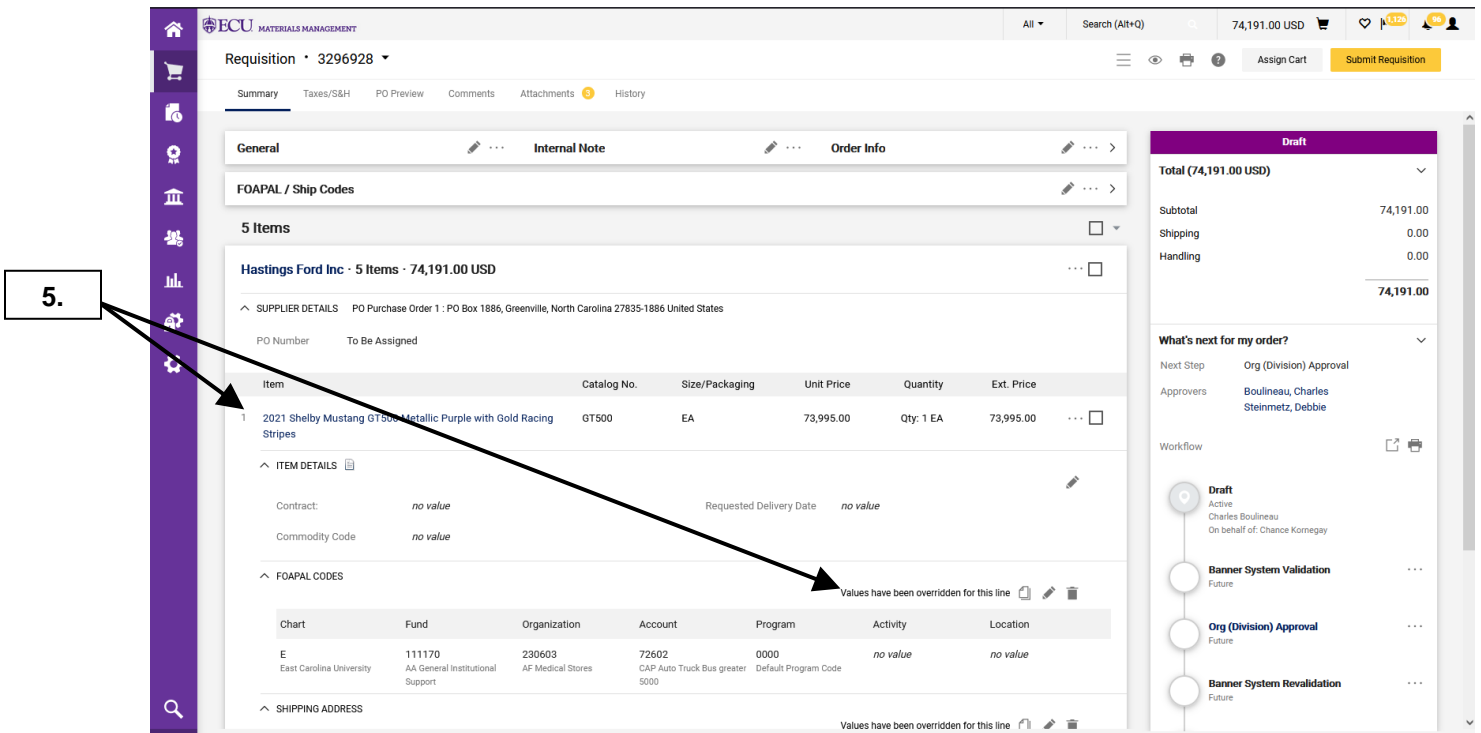
2. Click the **Item Actions** button corresponding to the appropriate line item to and select **FOAPAL Codes** from the fly out list.

FOAPAL EDIT BY LINE ITEM

Last Updated on: 7/20/2021



3. For a quick change, input the value for the FOAPAL element needing change or select a value from the search option.
4. Click the **Save** button.



5. A change to the FOAPAL Code has been indicated at the line item.
Note: Line items may be split by percentage or price. 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: 7/20/2021

Requisition 3296928

Summary Taxes/S&H PO Preview Comments Attachments History

General Internal Note Order Info

Priority Normal

Department AF Materials Management (AF Materials Management)

Prepared by Charles Boulineau

Prepared for Chance Kornegay

Cart Name 2021-07-20 brownb 01

Accounting Data no value

Accruals no value

Internal Note

Internal Info

Business Purpose / Note to Approvers no value

State Exempt Non State Funds

Internal Attachments

Attachment	Date	Action
Warranty_Information.pdf	5/24/2021	...
Vehicle_Options.pdf	5/24/2021	...
Mustang+Quote.pdf	5/24/2021	...

Order Info

Business Required

Pricing Ref # no value

Special Instructions None

Attachments for all suppliers Add

PO Clauses View details

Draft

Total (74,191.00 USD)

Subtotal 74,191.00

Shipping 0.00

Handling 0.00

74,191.00

What's next for my order?

Next Step Org (Division) Approval

Approvers Boulineau, Charles Steinmetz, Debbie

Workflow

Draft Active Charles Boulineau On behalf of: Chance Kornegay

Banner System Validation Future

1.

1. To make FOAPAL line item changes, collapse the **General** and **FOAPAL / Ship Codes** header sections or scroll down to the **Items** section of your document.
Note: Splitting the FOAPAL codes for payment by exact dollar amount can only be done at the line item level.

Requisition 3296928

Summary Taxes/S&H PO Preview Comments Attachments History

General Internal Note Order Info

FOAPAL / Ship Codes

5 Items

Hastings Ford Inc - 5 Items - 74,191.00 USD

SUPPLIER DETAILS - PO Purchase Order 1 : PO Box 1886, Greenville, North Carolina 27835-1886 United States

PO Number To Be Assigned

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	Actions
2021 Shelby Mustang GT500 Metallic Purple with Gold Racing Stripes	GT500	EA	73,995.00	Qty: 1 EA	73,995.00	...
ITEM DETAILS						
Contract:	no value	Requested Delivery Date	no value			
Commodity Code	no value					
2 WeatherProof Black Rugged Floor Mats	MATS	EA	49.00	Qty: 4 EA	196.00	...
ITEM DETAILS						
Contract:	no value	Requested Delivery Date	no value			
Commodity Code	no value					

Draft

Total (74,191.00 USD)

Subtotal 74,191.00

Shipping 0.00

Handling 0.00

74,191.00

What's next for my order?

Next Step Org (Division) Approval

Approvers Boulineau, Charles Steinmetz, Debbie

Workflow

Draft Active Charles Boulineau On behalf of: Chance Kornegay

Banner System Validation Future

Org (Division) Approval Future

Banner System Revalidation Future

2.

2. From the Items section, click the **Line Item Actions** ellipses for a list of actions.

FOAPAL SPLIT BY AMOUNT AT LINE ITEM

Last Updated on: 7/20/2021

The screenshot shows the 'Requisition' page for requisition 3296928. The main content area displays a table of 5 items from 'Hastings Ford Inc'. The first item is '2021 Shelby Mustang GT500 Metallic Purple with Gold Racing Stripes' with a unit price of 73,995.00 and a quantity of 1 EA. A fly-out menu is open over the first item, listing options: 'Override', 'General', 'FOAPAL Codes', 'Ship To', 'Remove', 'Add to Favorites', 'Move to Another Cart', and 'Add to Draft Cart or Pending PR/PO'. A box with the number '3.' has an arrow pointing to the 'FOAPAL Codes' option in the menu.

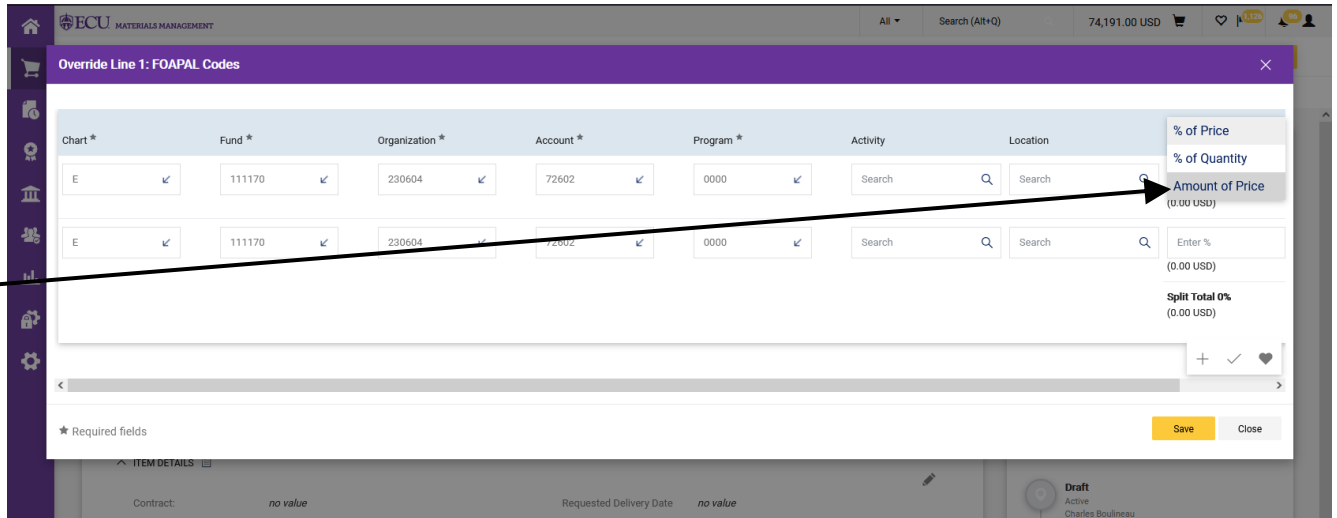
3. Select the **FOAPAL Codes** option from the fly-out item actions list.

The screenshot shows the 'Override Line 1: FOAPAL Codes' dialog box. It contains a table with columns for 'Chart *', 'Fund *', 'Organization *', 'Account *', 'Program *', 'Activity', and 'Location'. The 'Chart' field is set to 'E', 'Fund' to '111170', 'Organization' to '230604', and 'Account' to '72602'. The 'Program' field is set to '0000'. There are search boxes for 'Activity' and 'Location'. A box with the number '4.' has an arrow pointing to a plus sign icon (+) located at the bottom right of the dialog box, next to the 'Save' and 'Close' buttons.

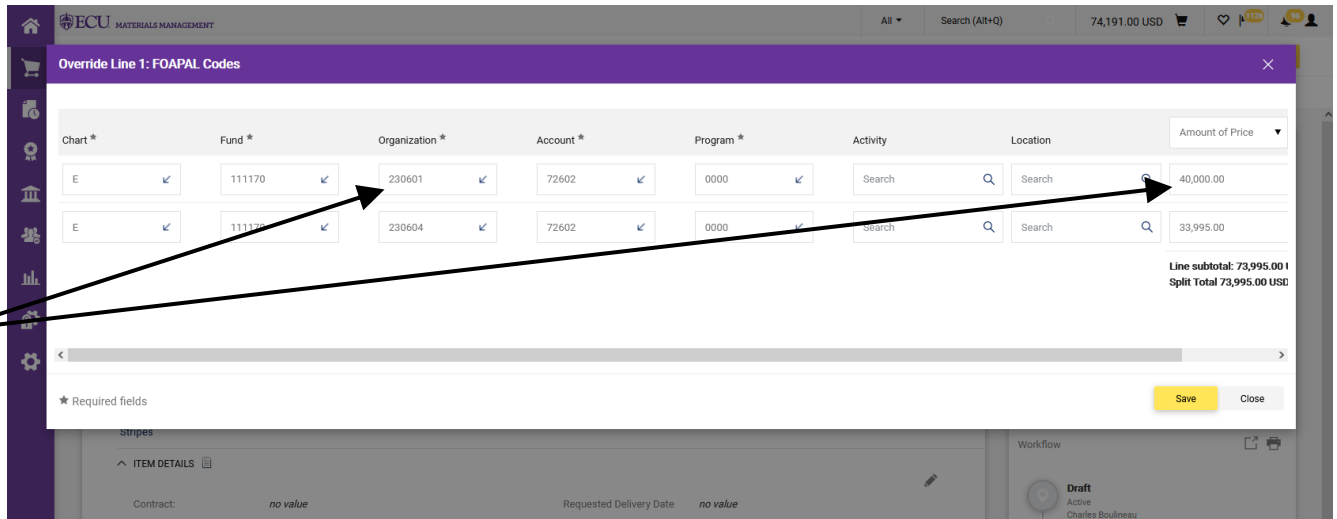
4. To add one or more FOAPAL split to a line item, hover over the FOAPAL values to reveal the options. Click the **add split (+)** icon.

FOAPAL SPLIT BY AMOUNT AT LINE ITEM

Last Updated on: 7/20/2021



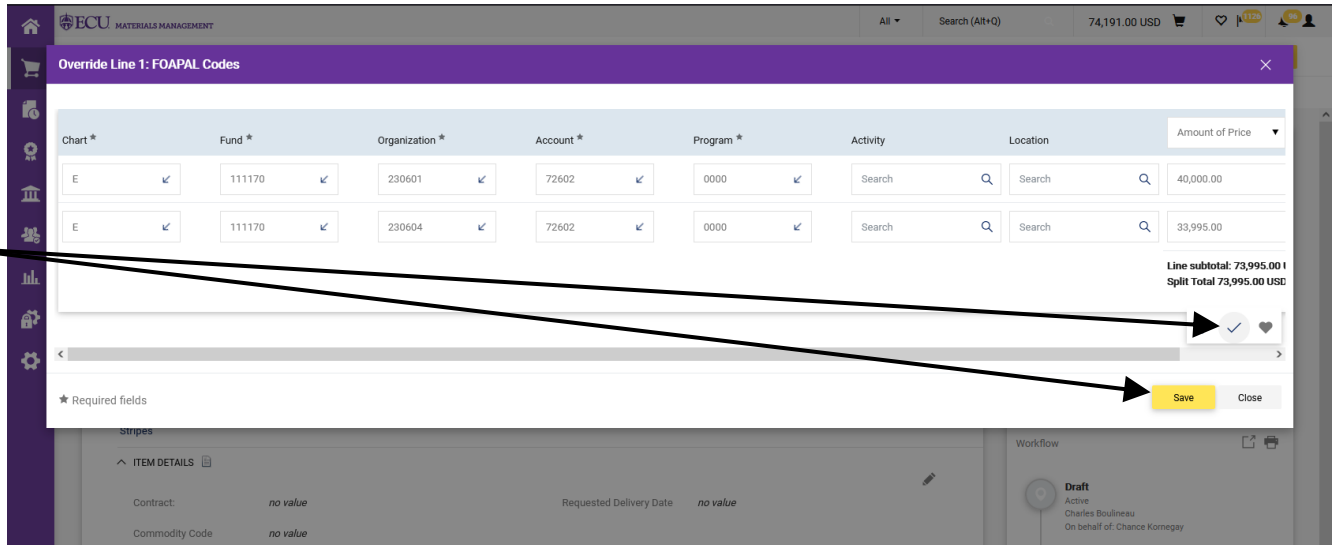
5. Click the split type dropdown to select **Amount of Price**.
Note: Line items may be split by percentage or price.



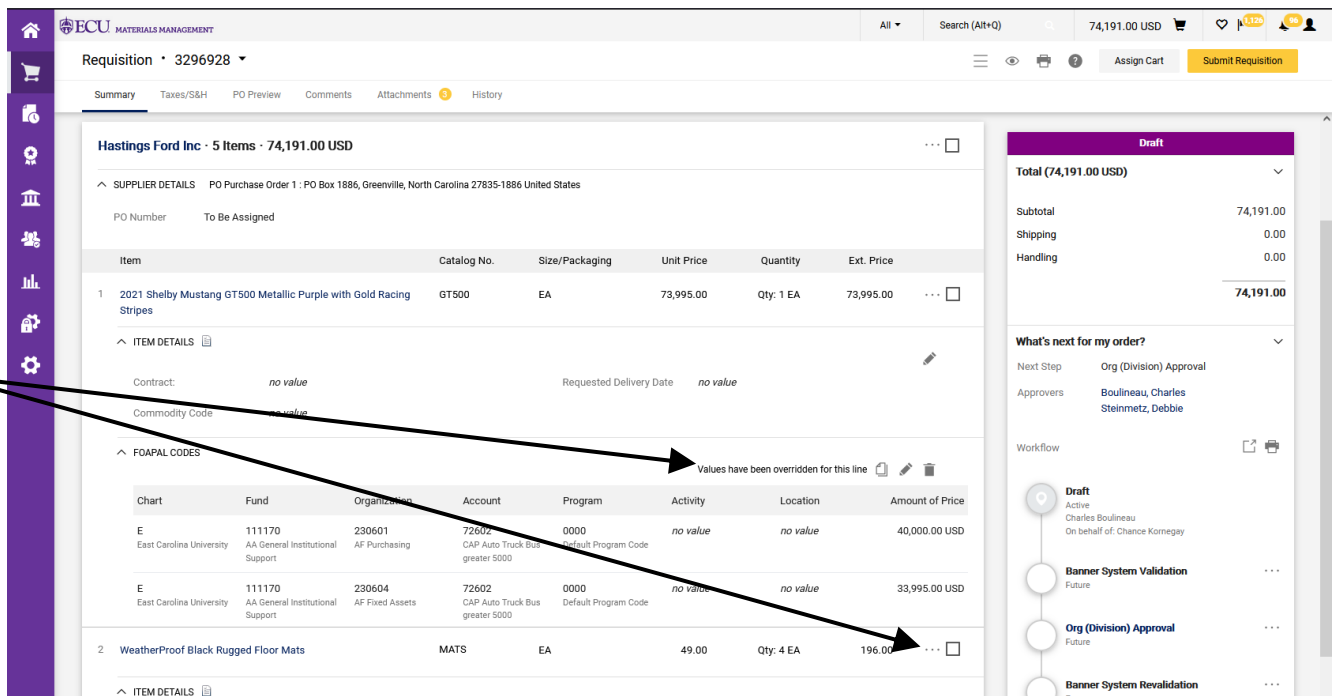
6. Make the change to your FOAPAL value and input the corresponding dollar value.

FOAPAL SPLIT BY AMOUNT AT LINE ITEM

Last Updated on: 7/20/2021



- Use the recalculate / validate tool by clicking the (✓) icon to ensure your line subtotal matches the split total. Click **Save**.



- Notice the information bulletin indicating **Values have been overridden for this line** being displayed because of the FOAPAL 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: 7/20/2021

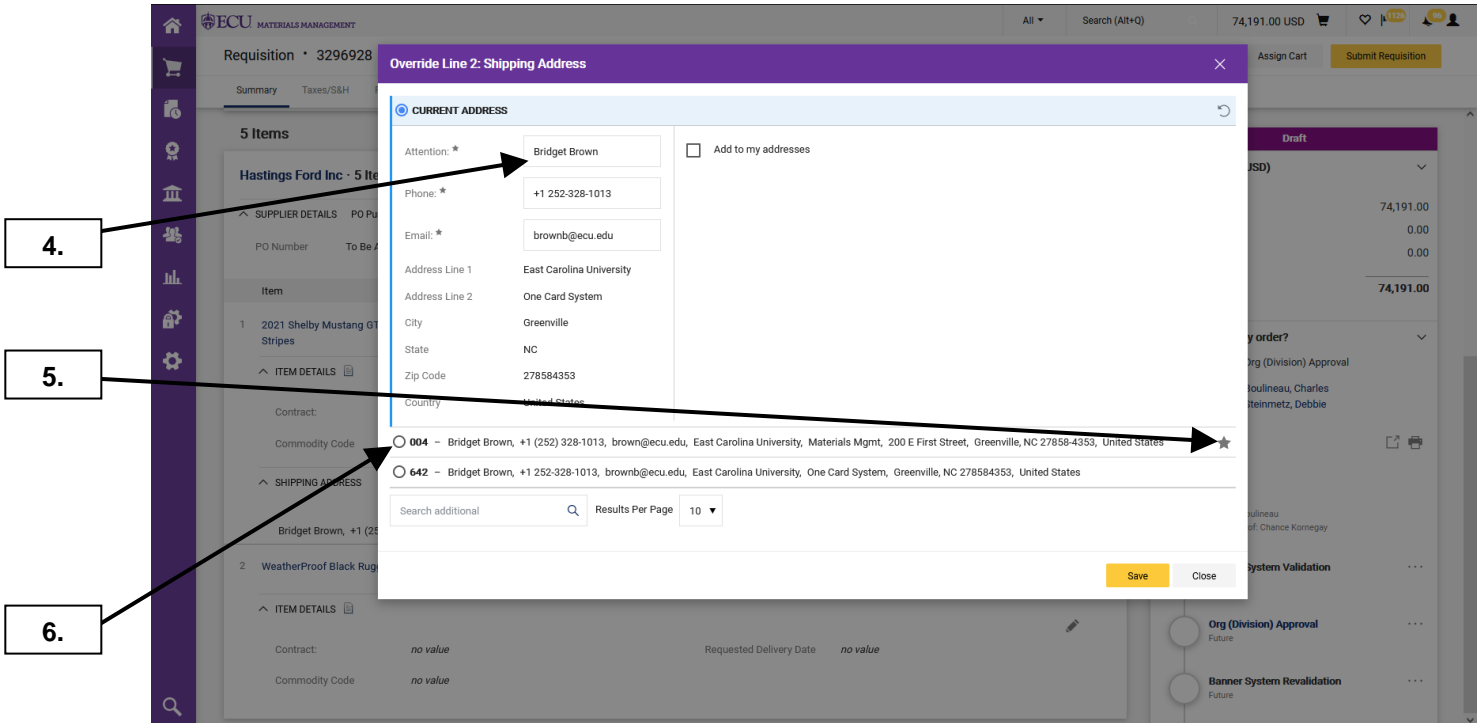
1. Scroll to the **FOAPAL / Ship Codes** section to view details on the current shipping address. **Note:** The Ship To address displayed at the header will apply to all line items unless overridden.

2. Scroll down to the **Items** section of the document to change the ship to address for each appropriate line.

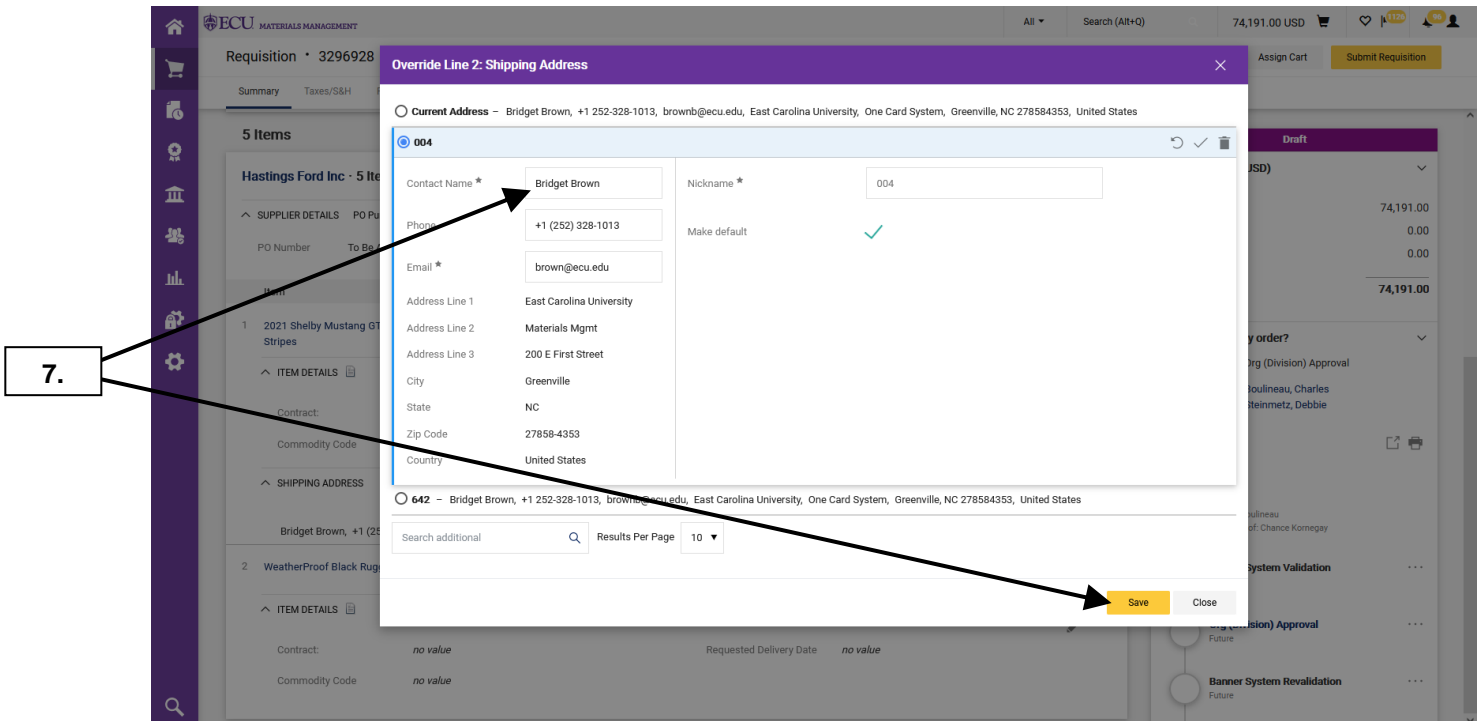
3. Click the **item actions** ellipses and select **Ship To** from the fly-out options list corresponding with the appropriate line item.

SHIP TO EDIT BY LINE ITEM

Last Updated on: 7/20/2021



4. 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.
5. The default Ship To code on your profile is indicated by a star icon.
6. Click the **Radio Button** for the desired ship code on your profile.



7. Make any edit to the ship to contact information necessary then click **Save**.

SHIP TO EDIT BY LINE ITEM

Last Updated on: 7/20/2021

Requisition · 3296928

Summary Taxes/S&H PO Preview Comments Attachments 5 History

5 Items

Hastings Ford Inc - 5 Items - 74,191.00 USD

SUPPLIER DETAILS PO Purchase Order 1 : PO Box 1886, Greenville, North Carolina 27835-1886 United States

PO Number To Be Assigned

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	2021 Shelby Mustang GT500 Metallic Purple with Gold Racing Stripes	GT500 EA	73,995.00	Qty: 1 EA	73,995.00
2	WeatherProof Black Rugged Floor Mats	MATS EA	49.00	Qty: 4 EA	196.00

ITEM DETAILS

Contract: no value Requested Delivery Date: no value

Commodity Code: no value

SHIPPING ADDRESS

Bridget Brown, +1 (252) 328-1013, brown@ecu.edu, East Carolina University, Materials Mgmt, 200 E First Street, Greenville, NC 27858-4353, United States

Values have been overridden for this line

Workflow

- Draft Active Charles Boulineau On behalf of: Chance Kornegay
- Banner System Validation Future
- Org (Division) Approval Future
- Banner System Revalidation Future

- 8. The Ship To address has been updated for line item 1 indicated by the message: **Values have been overridden for this line.**
Note: Other line items retain the Ship To record from the header.
- 9. Click to view the **PO Preview** tab.

SHIP TO EDIT BY LINE ITEM

Last Updated on: 7/20/2021

11. Summary

10. Preview PO 1

10. Preview PO 2

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1 2021 Shelby Mustang GT500 Metallic Purple with Gold Racing Stripes	GT500	EA	73,995.00	1 EA	73,995.00	
					Shipping	0.00
					Handling	0.00
					Total	73,995.00 USD

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
2 WeatherProof Black Rugged Floor Mats	MATS	EA	49.00	4 EA	196.00	
					Shipping	0.00
					Handling	0.00
					Total	196.00 USD

10. 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.
11. Click the **Summary** tab to continue cart review and submit requisition.

12. Submit Requisition

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 CBP - Truck Bus greater 5000 Default Program Code						

5 Items

Hastings Ford Inc - 5 Items - 74,191.00 USD

SUPPLIER DETAILS PO Purchase Order 1 : PO Box 1886, Greenville, North Carolina 27835-1886 United States

PO Number To Be Assigned

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 2021 Shelby Mustang GT500 Metallic Purple with Gold Racing Stripes	GT500	EA	73,995.00	Qty: 1 EA	73,995.00

12. Click the **Submit Requisition** button to complete the cart and create the requisition.
 This completes the procedure.

PRINT REQUISITION DETAIL

Last Updated on: 7/20/2021

Requisition 3296928

Summary Taxes/S&H PO Preview Comments Attachments History

General

Priority Normal

Department AF Materials Management (AF Materials Management)

Prepared by Charles Boulineau

Prepared for Charles Komegay

Cart Name 2021-07-20 brownb 01

Accounting Date no value

Accruals no value

Internal Note

Internal Info

Business no value

Purpose / Note to Approvers

State Exempt Non State Funds

Internal Attachments

Attachment	Date	Action
Warranty_Information.pdf	5/24/2021	...
Vehicle_Options.pdf	5/24/2021	...
Mustang+Quote.pdf	5/24/2021	...

Order Info

Backup Required

Pricing Ref # no value

Special Instructions None

Notes to Suppliers no value

Attachments for all suppliers Add

PO Clauses [View details](#)

Bill To

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

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		

Draft

Total (74,191.00 USD)

Subtotal 74,191.00

Shipping 0.00

Handling 0.00

74,191.00

What's next for my order?

Next Step Org (Division) Approval

Approvers Boulineau, Charles
Steinmetz, Debbie

Workflow

- Draft Active Charles Boulineau On behalf of: Chance Komegay
- Banner System Validation Future
- Org (Division) Approval Future
- Banner System Revalidation Future

1. Click **Submit Requisition** button to complete the cart and create the requisition.

Simple Advanced Go to: NON-CATALOG ITEM Favorites Forms Shop Quick Order Browse: Categories Contracts Chemicals

Search for products, suppliers, forms, part number, etc.

Requisition 3296928 Submitted

Summary

Requisition number	3296928
Requisition status	Pending
Cart name	2021-07-20 brownb 01
Requisition date	7/20/2021
Requisition total	74,191.00 USD
Number of line items	2

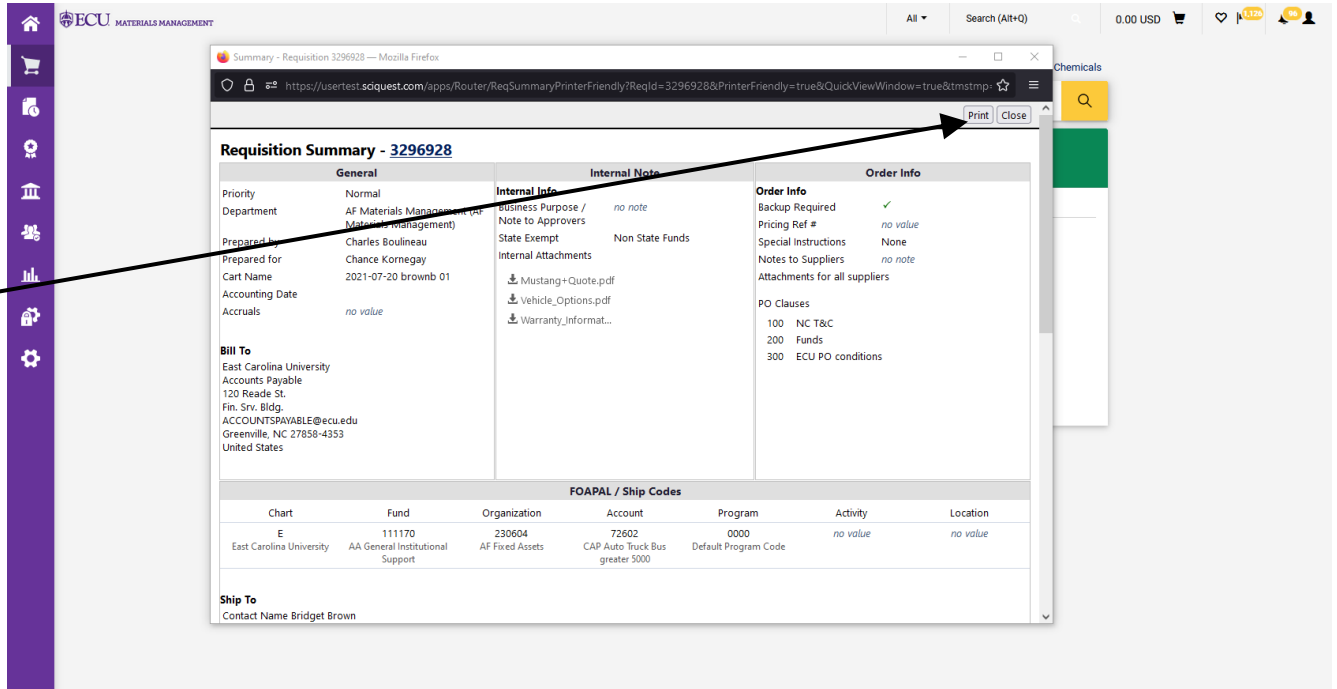
Options

- [Print](#)
- [Recent orders](#)
- [Return to your home page](#)

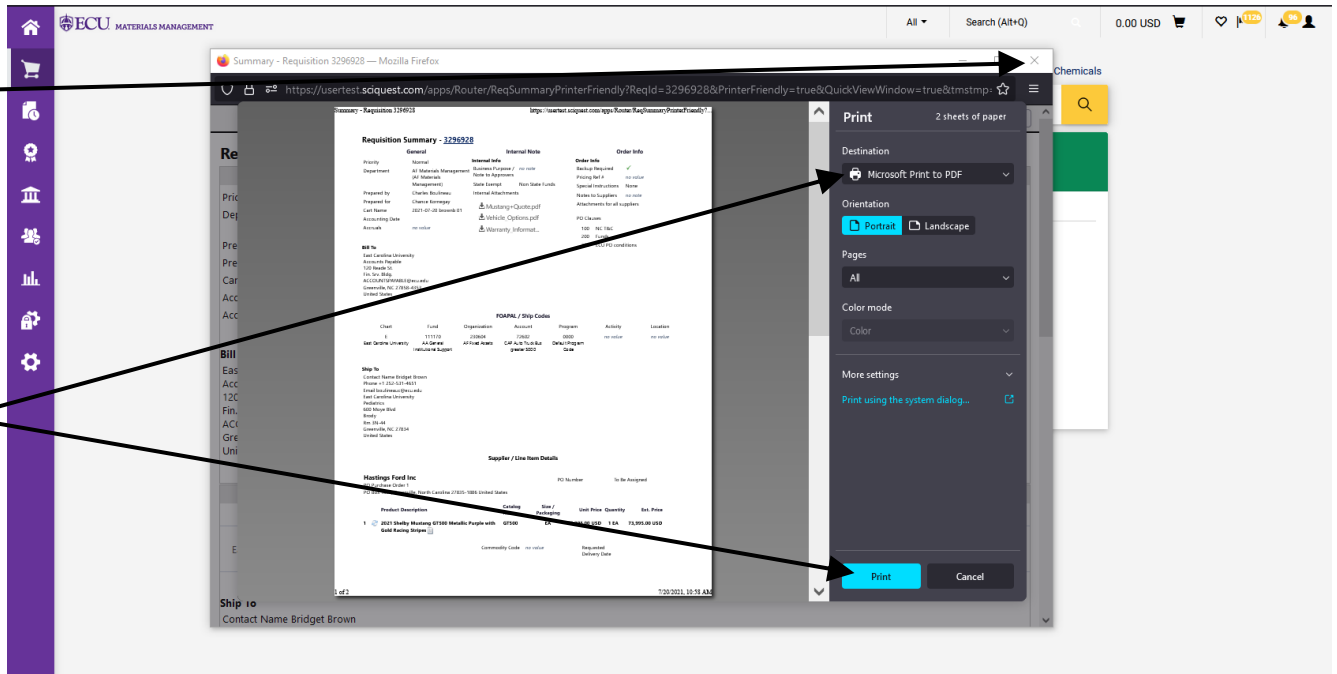
2. To print a copy of the requisition, click on the **Print preview** link.

PRINT REQUISITION DETAIL

Last Updated on: 7/20/2021



3. Click on the **Print** button from the Quick View overlay window.

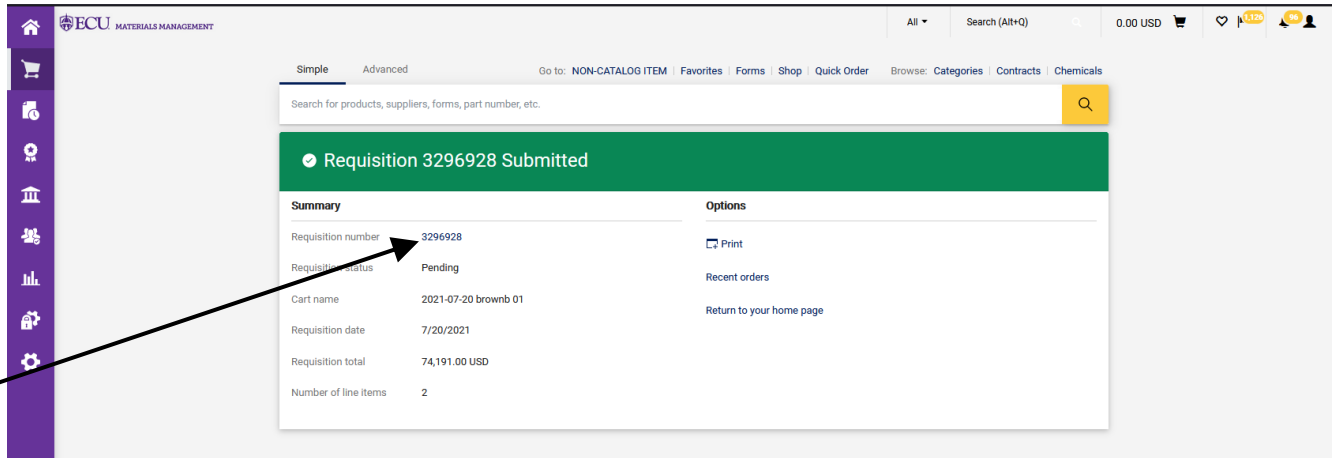


4. After selecting the appropriate printer, click the **Print** or **Save** button.

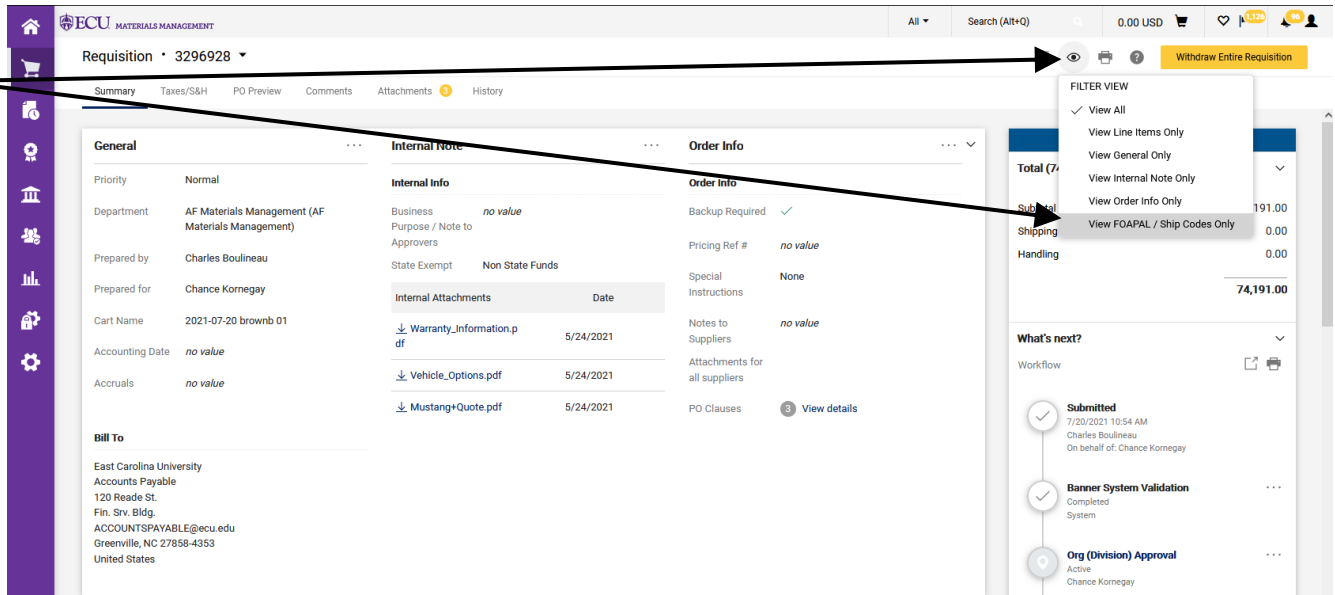
5. Click the **Close** button for the Print preview overlay window.

PRINT REQUISITION DETAIL

Last Updated on: 7/20/2021



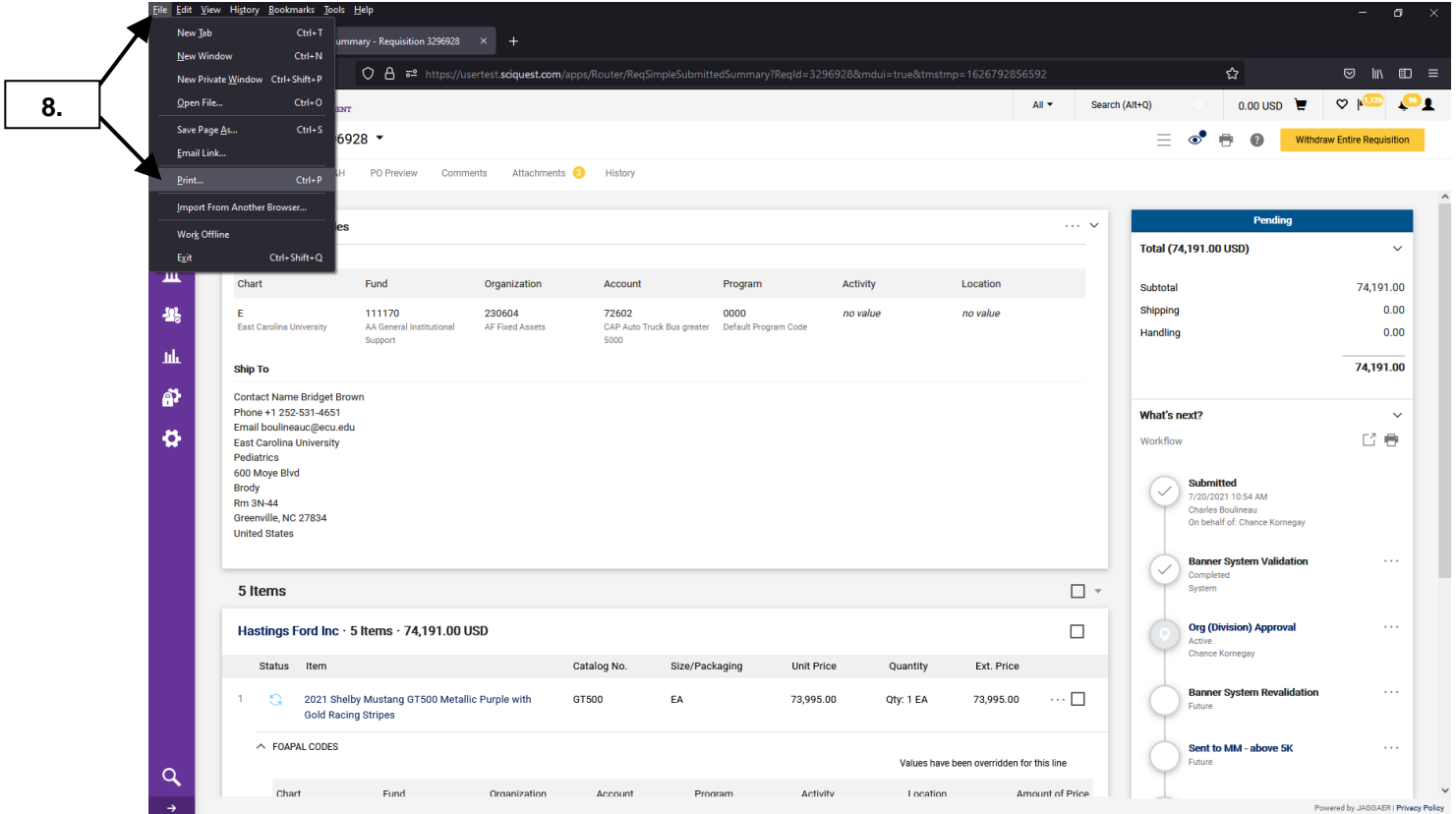
6. To see additional information on the document, click on the **requisition #**.



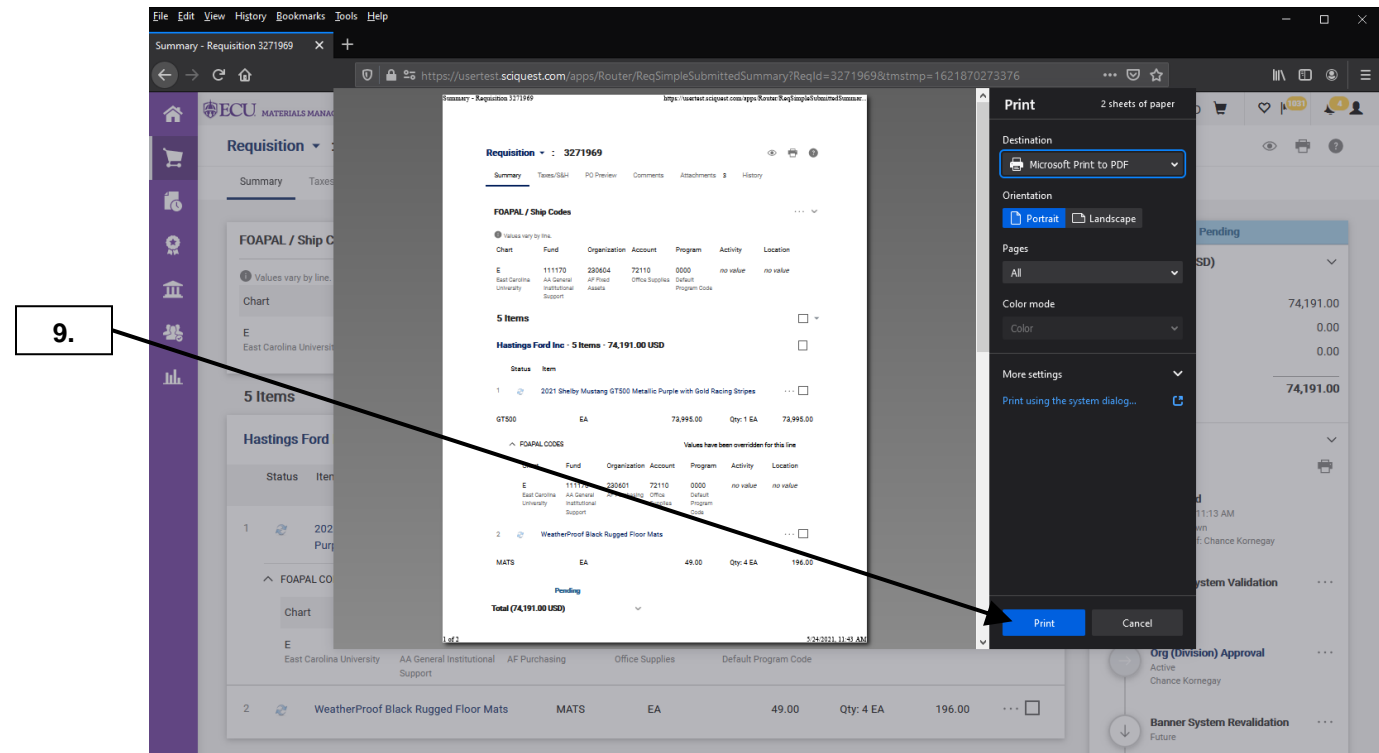
7. To view accounting details of the requisition, click on the **Filter View** icon and select **View FOAPAL / Ship Codes Only**.

PRINT REQUISITION DETAIL

Last Updated on: 7/20/2021



8. Use your browser print function to print the accounting details for the entire document.



9. This brings up a printer friendly view of the requisition accounting details. After selecting the appropriate printer, click on the **Print** button.

PRINT REQUISITION DETAIL

Last Updated on: 7/20/2021

10.

ECU MATERIALS MANAGEMENT

Requisition 3296928

Summary Taxes/SSH PO Preview Comments Attachments History

General

Priority Normal

Department AF Materials Management (AF Materials Management)

Prepared by Charles Boulineau

Prepared for Chance Kornegay

Cart Name 2021-07-20 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

Internal Note

Internal Info

Business no value

Purpose / Note to Approvers

State Exempt Non State Funds

Internal Attachments

Attachment	Date
Warranty_Information.pdf	5/24/2021
Vehicle_Options.pdf	5/24/2021
Mustang+Quote.pdf	5/24/2021

Order Info

Order Info

Backup Required

Pricing Ref # no value

Special Instructions None

Notes to Suppliers no value

Attachments for all suppliers

PO Clauses [View details](#)

Pending

Total (74,191.00 USD)

Subtotal	74,191.00
Shipping	0.00
Handling	0.00
Total	74,191.00

What's next?

Workflow

- Submitted
7/20/2021 10:54 AM
Charles Boulineau
On behalf of: Chance Kornegay
- Banner System Validation
Completed
System
- Org (Division) Approval
Active
Chance Kornegay
- Banner System Revalidation
Future
- Sent to MM - above 5K
Future

FOAPAL / Ship Codes

Values vary by line.

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

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

MOVE TO NEW CART

Last Updated on: 7/20/2021

Shopping Cart • 3297124

Search for products, suppliers, forms, part number, etc.

Priority: Normal

Prepared by: Bridget Brown

Prepared for: Bridget Brown

Cart Name: 2021-07-20 brownb 02

Business Purpose / Note to Approvers: 1000 characters remaining

Special Instructions: None

Notes to Suppliers: 1000 characters remaining

Backup Required:

State Exempt: Required

Correct these issues. You are unable to proceed until addressed.

Requirement can only contain one supplier. Remove or Move the items to another draft cart.

Required: State Exempt

Details

For: Bridget Brown

Estimate (4,873.04 USD)

Subtotal	4,873.04
Shipping	0.00
Handling	0.00
Total	4,873.04 USD

48 Items

Dell Marketing LP - 12 Items - 3,407.36 USD

SUPPLIER DETAILS PO Purchase Order 1: One Dell Way, Bldg R9B, R...

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
OptiPlex 7051	54891	EA	695.89	4 EA	2,783.56

ITEM DETAILS

Contract: Select price or contract...

1. PORT restricts requisitions to one supplier only. Scroll down to the Items details for your cart.

Shopping Cart • 3297124

48 Items

Dell Marketing LP - 12 Items - 3,407.36 USD

SUPPLIER DETAILS PO Purchase Order 1: One Dell Way, Bldg R9B, R...

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 OptiPlex 7051	54891	EA	695.89	4 EA	2,783.56
2 Wireless Keyboard/Mouse Kit	11012	EA	36.95	4 EA	147.80
3 4yr Complete Service	111247	EA	119.00	4 EA	476.00

ITEM DETAILS

Contract: Select price or contract...

ECU Medical Storeroom - 36 Items - 1,465.68 USD

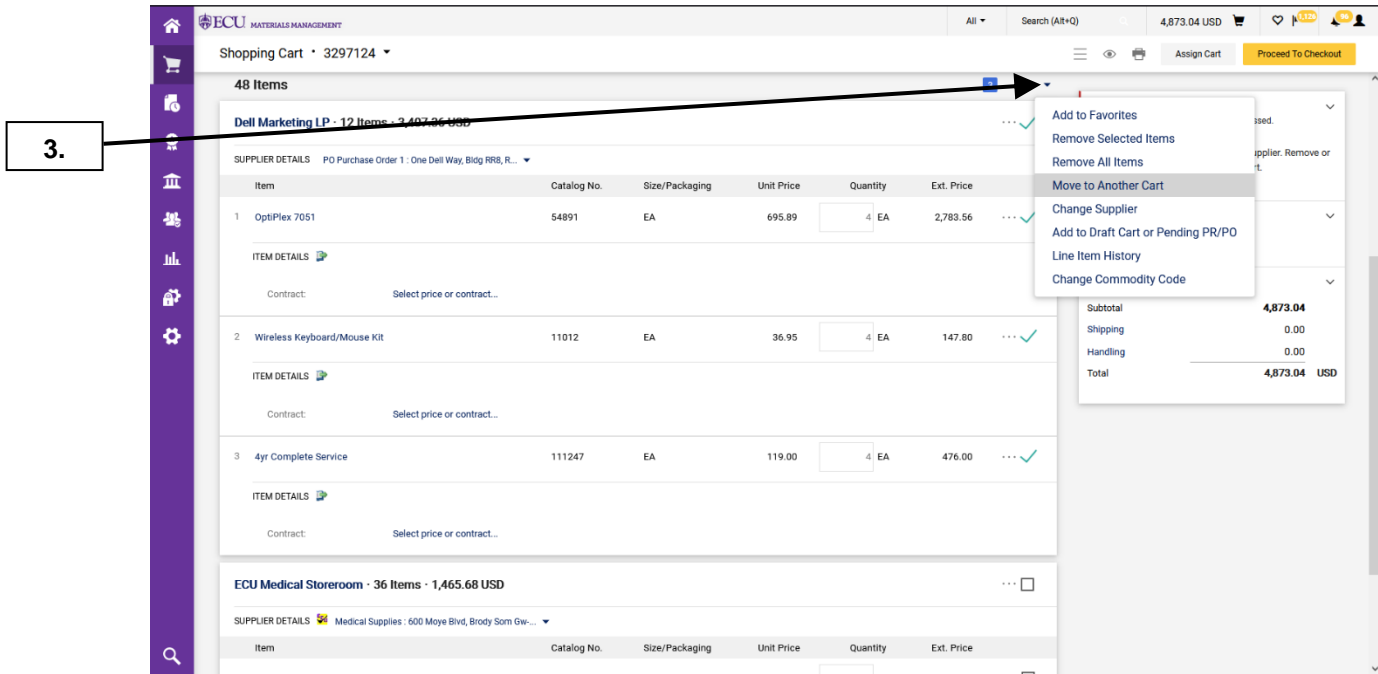
SUPPLIER DETAILS Medical Supplies - 600 Moye Blvd, Brody Som Gw...

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
------	-------------	----------------	------------	----------	------------

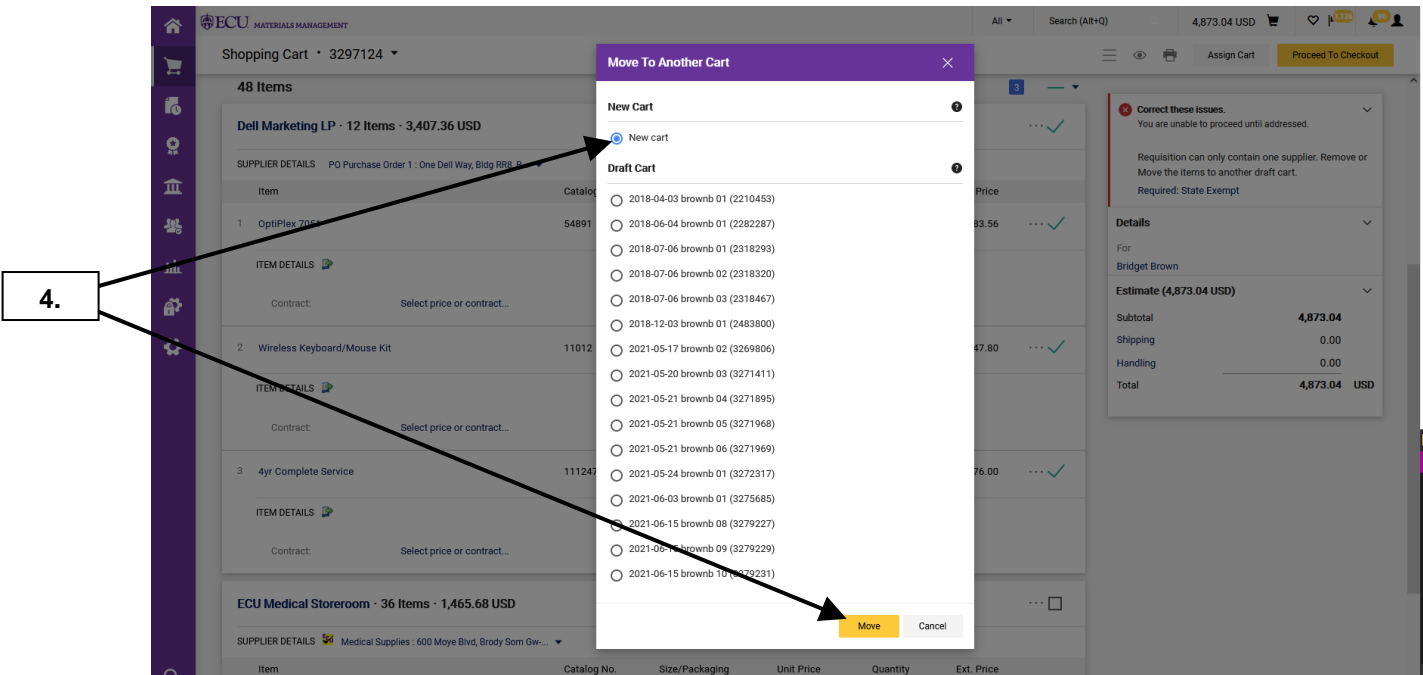
2. To move items for one supplier to a separate cart click the Select All check box beside the supplier detail to select all the items for the 1st supplier.

MOVE TO NEW CART

Last Updated on: 7/20/2021



3. From the Item Actions drop down list hover over **Move to Another Cart**.



4. Select the **New Cart** radio button from the fly out list then click **Move**.

MOVE TO NEW CART

Last Updated on: 7/20/2021

Shopping Cart • 3297124

1,465.68 USD

Assign Cart **Proceed to Checkout**

SUCCESS
3 items moved.
You are able to proceed until addressed.

Required: State Exempt

Details
For
Bridget Brown

Estimate (1,465.68 USD)
Subtotal **1,465.68**
Shipping 0.00
Handling 0.00
Total **1,465.68** USD

36 Items

ECU Medical Storeroom • 36 Items • 1,465.68 USD

SUPPLIER DETAILS Medical Supplier: 600 Moye Blvd, Brody Som Gw...

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 EDU2000 DISP CONNECTO SYRINGE CS/100/ 415081	180-26660	1/CS	58.00	24 CS	1,392.00
2 NITRILE POWDER FREE LARGE BOX DELTA ACG-120 NITREX	120-23440	1/BX	6.14	12 BX	73.68

5. Notice the **SUCCESS** message indicating the items have been moved to a new cart.

6. Click on the **Proceed to Checkout** button to continue the review process.

Requisition • 3297124

1,465.68 USD

Assign Cart **Submit Requisition**

Summary Taxes/S&H PO Preview Comments Attachments History

General Internal Note Order Info

Priority Normal

Department Administration and Finance (Administration and Finance)

Prepared by Bridget Brown

Prepared for Bridget Brown

Cart Name 2021-07-20 brownb 02

Accounting Date no value

Account no value

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

FOAPAL / Ship Codes

Draft

Total (1,465.68 USD)
Subtotal 1,465.68
Shipping 0.00
Handling 0.00
1,465.68

What's next for my order?

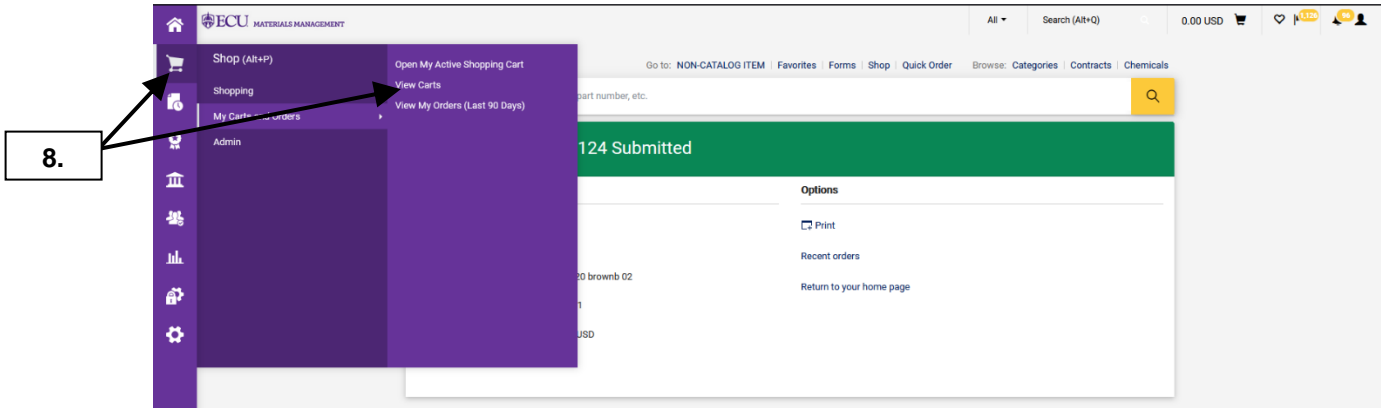
Next Step Org (Division) Approval
Approver Boulineau, Charles

Workflow
Draft Active Bridget Brown
Banner System Validation Future
Org (Division) Approval Future

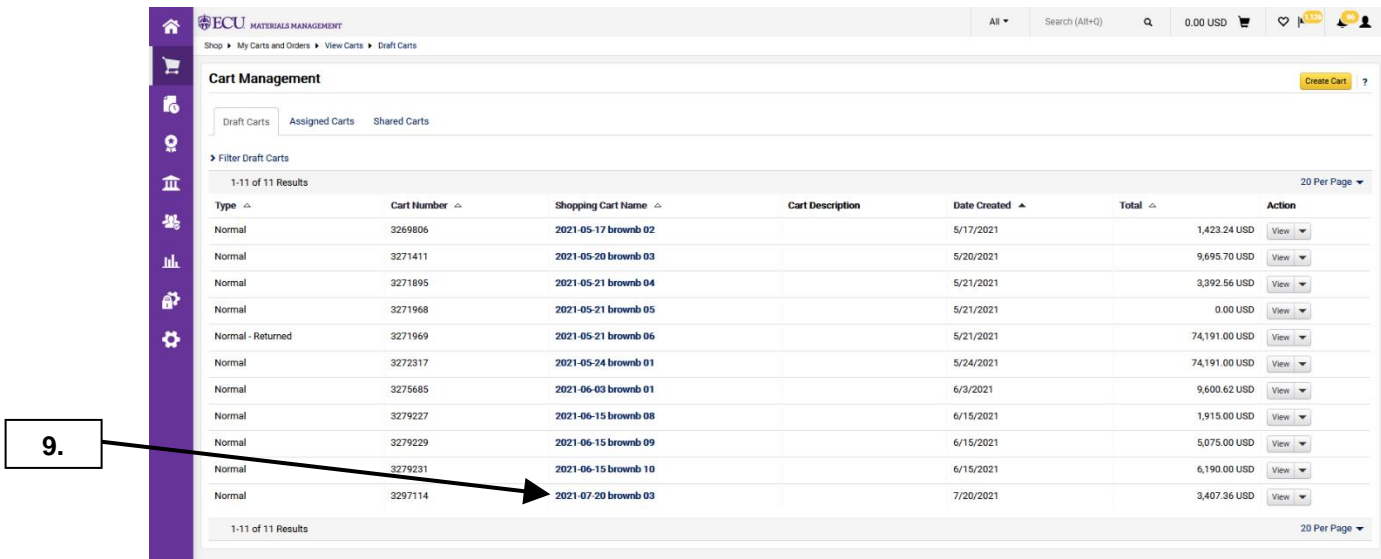
7. See the **Edit Cart Header**, **Edit Cart Items**, **Review Cart Header**, and **Review Cart Items** procedures to continue the review process. Since all the FOAP and ship code info is correct, the cart will be completed by clicking on **Submit Requisition** button.

MOVE TO NEW CART

Last Updated on: 7/20/2021



8. To view the new cart with the moved items hover on the **Shop icon > My Carts and Orders > select View Carts.**



9. Click on the draft shopping cart for the items that were moved in steps 2 – 7.

MOVE TO NEW CART

Last Updated on: 7/20/2021

ECU MATERIALS MANAGEMENT

Shopping Cart • 3297114

3,407.36 USD

Assign Cart Proceed To Checkout

Simple Advanced

Search for products, suppliers, forms, part number, etc.

Priority: Normal

Business Purpose / Note to Approvers

Backup Required

Prepared by: Bridget Brown

Special Instructions: None

Prepared for: Bridget Brown

State Exempt

Classroom Instruction

Notes to Suppliers

Cart Name: 2021-07-20 brownb 03

12 Items

Dell Marketing LP - 12 Items - 3,407.36 USD

SUPPLIER DETAILS PO Purchase Order 1 : One Dell Way, Bldg RR8, R...

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 OptiPlex 7051	54891	EA	695.89	4 EA	2,783.56
ITEM DETAILS					
Contract: Select price or contract...					
2 Wireless Keyboard/Mouse Kit	11012	EA	36.95	4 EA	147.80
ITEM DETAILS					

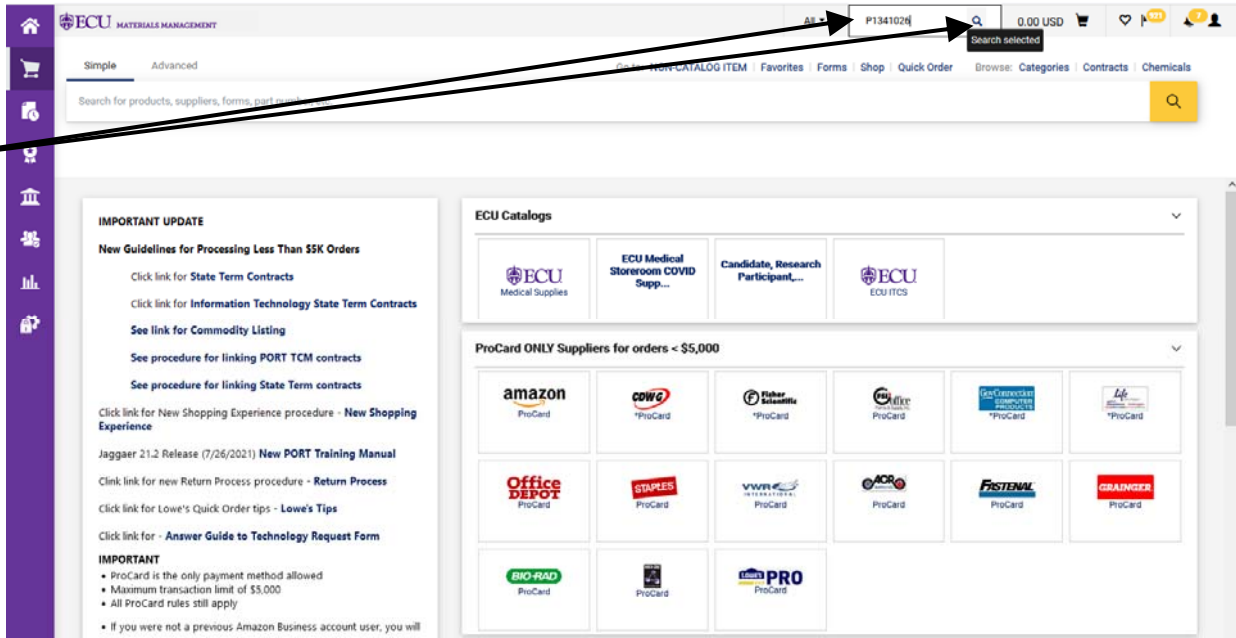
Powered by JAGGAER | Privacy Policy

10.

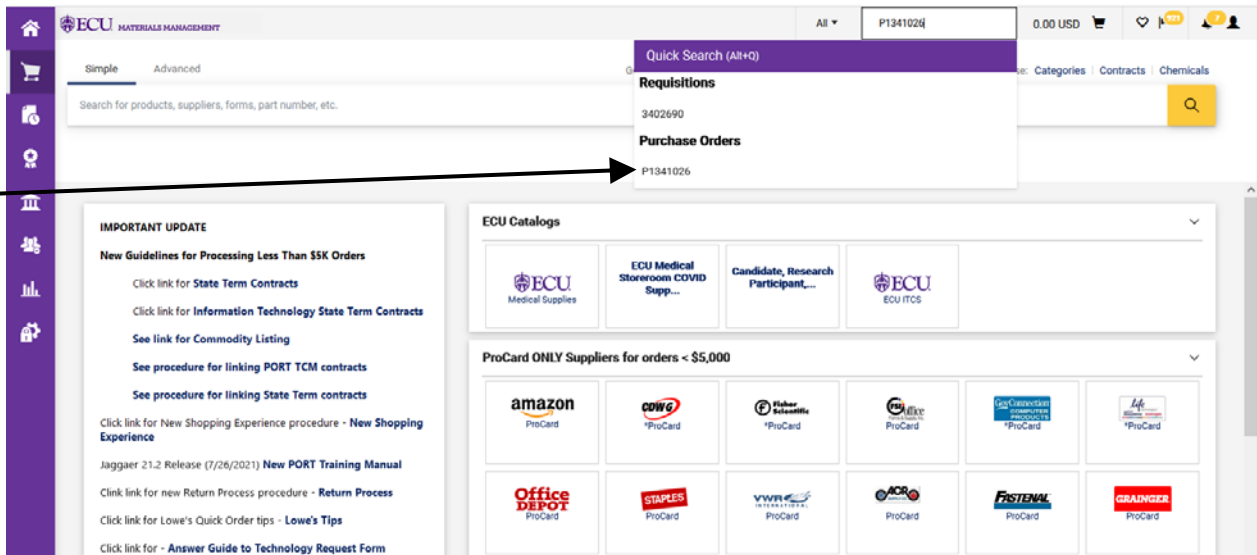
10. This completes the steps for this procedure. See the **Edit Cart Header, Edit Cart Items, Review Cart Header, and Review Cart Items** procedures to continue the review process.

RECEIVING

Last Updated on: 11/17/2021



1. Enter the PO # in **Quick Search** box and click on magnifying glass.



2. Click on PO # from the **Quick Search** drop-down box.

RECEIVING

Last Updated on: 11/17/2021

3.

3. Click on **Receipts** tab.

4.

4. From this tab, you can determine if you have completed previous receipts against the purchase order to ensure you do not duplicate a receipt that has been submitted. Click on **+** to create a new receipt.

RECEIVING

Last Updated on: 11/17/2021

Quantity Receipt * 471125

Summary Comments Attachments History

Receipt Name: 2021-11-17 balls 01
Receipt No.: To Be Assigned
Receipt Date: 11/17/2021
Carrier: UPS
Tracking No.: 123432432412432432
Receipt Type: Receipt Required
Supplier Name: Lenovo (United States) Inc
Received by: Bridget Brown
Receipt Address: Attention: Bridget Brown, East Carolina University, Greenville, NC 278584353, United States

PO * P1341026

Draft

Details

Creation Date: 11/17/2021 2:16:48 PM
Source: Manual
Supplier: Lenovo (United States) Inc
Received by: Bridget Brown

Total (194.54 USD)
Subtotal: 194.54

Related Documents
Purchase Order: P1341026

5.

6.

5. 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.
6. Scroll down the page to view the line-item information for the receipt.

Quantity Receipt * 471125

Summary Comments Attachments History

PO * P1341026

Line	Item	Catalog No.	Quantity	Status
1	ThinkPad Dock	22408	1 EA	Received
ITEM DETAILS				
Contract No. no value				
Attachments Add				
2	45w Power Adapter	ADT887	1 EA	Received

Draft

Details

Creation Date: 11/17/2021 2:16:48 PM
Source: Manual
Supplier: Lenovo (United States) Inc
Received by: Bridget Brown

Total (194.54 USD)
Subtotal: 194.54

Related Documents
Purchase Order: P1341026

7.

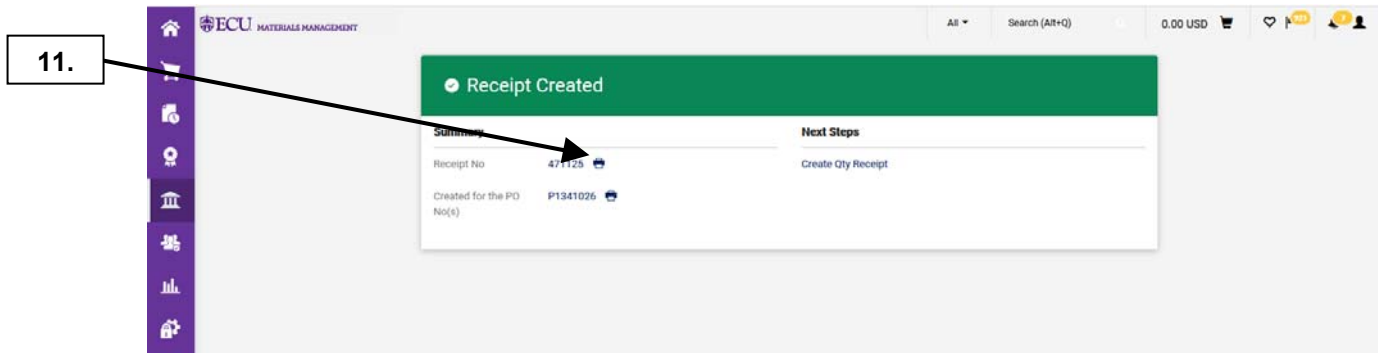
7. Notice that the first time you complete a receipt on a PO, the system defaults to the number of items ordered. If all items were delivered on the first shipment, proceed to step 10 to complete the receipt.

RECEIVING

Last Updated on: 11/17/2021



8. 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.
9. Click the **Save Updates** button.
10. Click the **Complete** button to complete the receipt for the 1st shipment.



11. Click on the **Printer** icon if you need a printed copy of the receipt.

RECEIVING

Last Updated on: 11/17/2021

Summary - Receipt 471125

Receipt Create Date: 11/17/2021 2:16:48 PM
Complete Date: 11/17/2021 2:45:01 PM
Source: Manual

Header Information

Receipt No	Receipt Date	Packing Slip No.	Supplier Name	Received by
471125	11/17/2021		Lenovo (United States) Inc	Bridget Brown

RECEIPT ADDRESS Location

DELIVERY Carrier: UPS
Tracking No: 123432432412432432
Receipt Type: Receipt Required
Attachments: Notes (1,000 Chars. Max)

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

Line Details

PO No.	PO Line No.	Product Name	Catalog No.	Qty/UOM ordered	Previous Receipts	Quantity	Add to Inventory	Line Status	Actions
P1341026	1	ThinkPad Dock	22408	1 EA Not Received 10/12/99 (12/99)		1		Received	
P1341026	2	45w Power Adapter	ADT887	1 EA		0		Received	

Contract No., Attachments, Notes

12.

13.

- 12. This brings up a printer friendly view of the receipt. Click **Print** button if a printed copy of the receipt is needed.
- 13. Close the browser window.

ECU MATERIALS MANAGEMENT

Quantity Receipt • 471125

Summary Comments Attachments History

Receipt Name	2021-11-17 balls 01	Carrier	UPS
Complete Date	11/17/2021 2:45:01 PM	Tracking No.	123432432412432432
Receipt No	471125	Receipt Type	Receipt Required
Receipt Date	11/17/2021	Attachments	Add
Packing Slip No.	no value	Notes	no value
Supplier Name	Lenovo (United States) Inc		
Received by	Bridget Brown		
Receipt Address	no value		
	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		

Completed

Details

Creation Date: 11/17/2021 2:16:48 PM
Completion Date: 11/17/2021 2:45:01 PM
Source: Manual
Supplier: Lenovo (United States) Inc
Received by: Bridget Brown

Total (129.95 USD)

Subtotal: 129.95
129.95

Related Documents

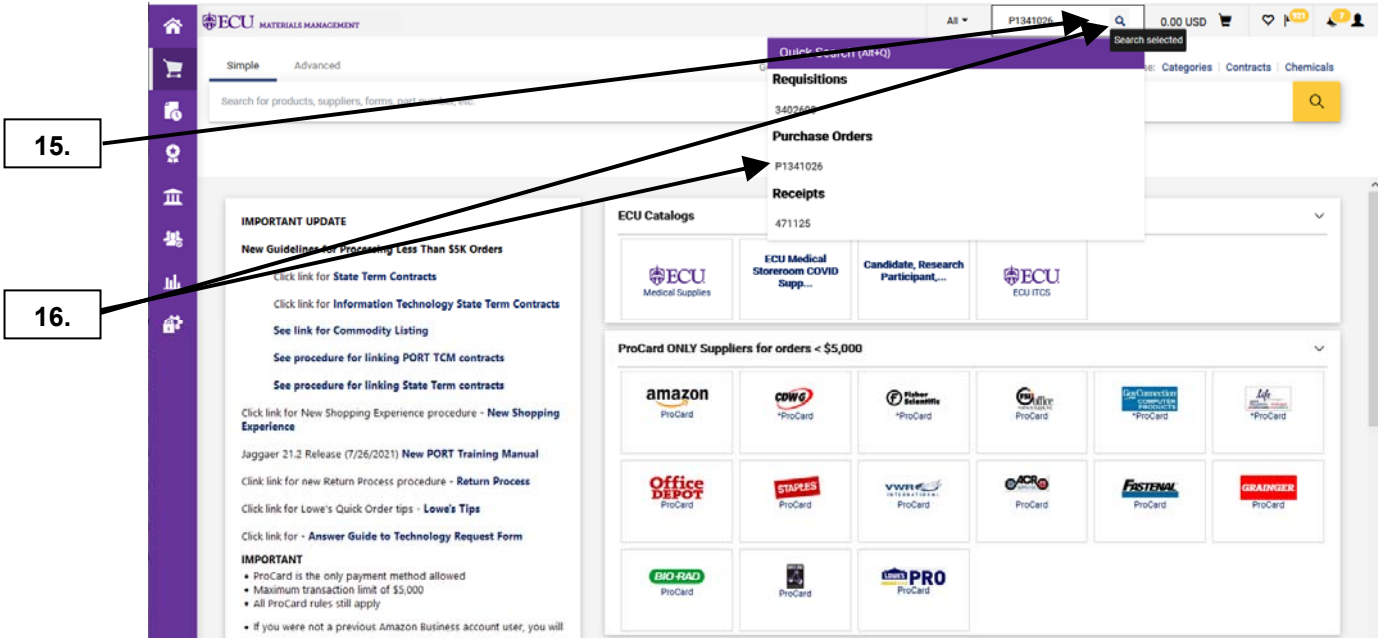
Purchase Order: P1341026

14.

- 14. This completes the steps for this first receipt for a PO. Click the **ECU** icon to go home.

RECEIVING

Last Updated on: 11/17/2021



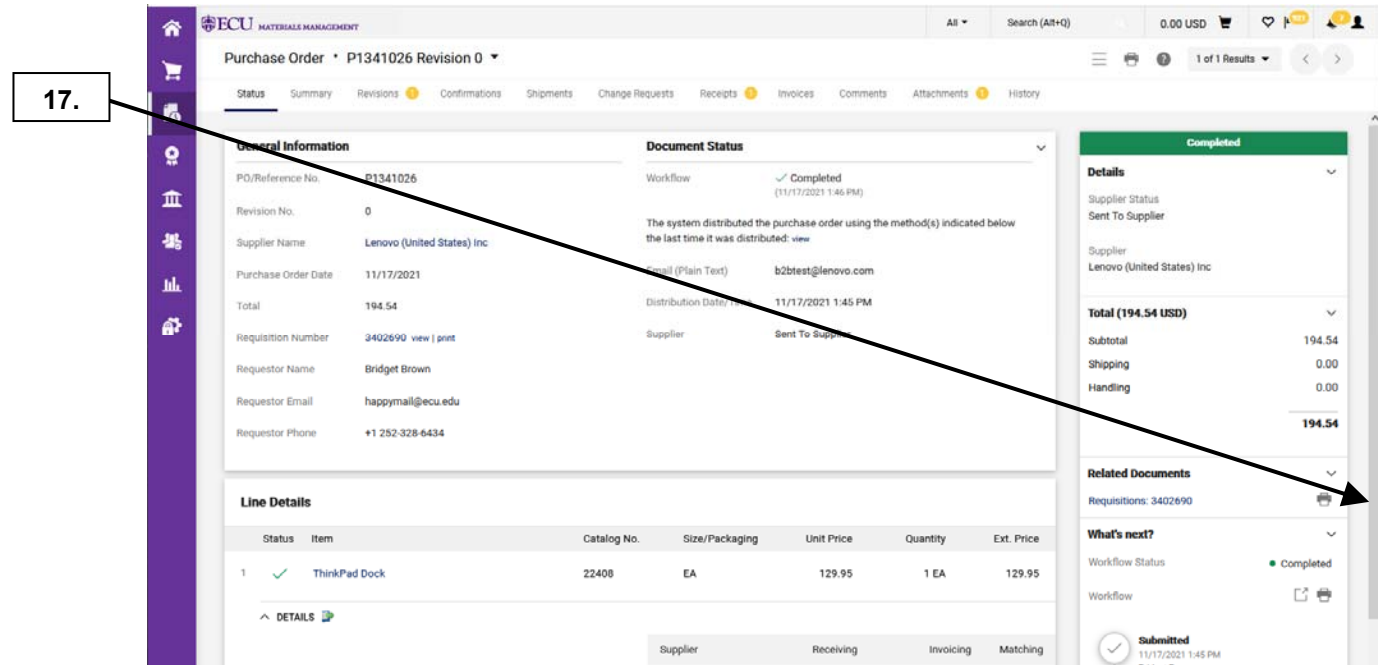
15.

16.

15. Enter the PO # in the **Quick Search** box.

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.

16. Click on magnifying glass to execute the **Quick Search** then click the **Purchase Order**.



17.

17. Scroll down the page to view the line-items.

RECEIVING

Last Updated on: 11/17/2021

19. Click on the **Receipts** tab to see if there are existing receipts for the PO. **Note:** The number of previous receipts are indicated on the tab.

18. Notice the receiving status of the line items for the PO.

Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price								
1 ✓	ThinkPad Dock	22408	EA	129.95	1 EA	129.95								
<table border="1"> <thead> <tr> <th>Supplier</th> <th>Receiving</th> <th>Invoicing</th> <th>Matching</th> </tr> </thead> <tbody> <tr> <td>Sent To Supplier</td> <td>Fully Received</td> <td>none</td> <td>Do not Match</td> </tr> </tbody> </table>							Supplier	Receiving	Invoicing	Matching	Sent To Supplier	Fully Received	none	Do not Match
Supplier	Receiving	Invoicing	Matching											
Sent To Supplier	Fully Received	none	Do not Match											
2 ✓	45w Power Adapter	ADT887	EA	64.59	1 EA	64.59								
<table border="1"> <thead> <tr> <th>Supplier</th> <th>Receiving</th> <th>Invoicing</th> <th>Matching</th> </tr> </thead> <tbody> <tr> <td>Sent To Supplier</td> <td>none</td> <td>none</td> <td>Do not Match</td> </tr> </tbody> </table>							Supplier	Receiving	Invoicing	Matching	Sent To Supplier	none	none	Do not Match
Supplier	Receiving	Invoicing	Matching											
Sent To Supplier	none	none	Do not Match											

18. Notice the receiving status of the line items for the PO.
19. Click on the **Receipts** tab to see if there are existing receipts for the PO. **Note:** The number of previous receipts are indicated on the tab.

20. Click on **Purchase Order Actions** dropdown box and select **Create Quantity Receipt**.

20. Click on **Purchase Order Actions** dropdown box and select **Create Quantity Receipt**.

RECEIVING

Last Updated on: 11/17/2021

Quantity Receipt • 471135

Summary Comments Attachments History

Receipt Name: 2021-11-17 balls 02 Carrier: UPS

Receipt No.: To Be Assigned Tracking No.: 345346433465345

Receipt Date: 11/17/2021 Receipt Type: Receipt Required

Packing Slip No.: 122242421 Attachments: Add

Supplier Name: Lenovo (United States) Inc

Received by: Bridget Brown

Receipt Address: Attention: Bridget Brown
Phone: +1 252-328-1013
Email: komegych@ecu.edu
East Carolina University
Biology Department
Sci & Tech
337
Greenville, NC 278584353
United States

Notes: 1000 characters remaining

PO • P1341026

Draft

Details

Creation Date: 11/17/2021 3:49:24 PM

Source: Manual

Supplier: Lenovo (United States) Inc

Received by: Bridget Brown

Total (64.59 USD)

Subtotal: 64.59

64.59

Related Documents

Purchase Order: P1341026

21.

22.

21. 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.
22. Scroll down to view all line items.

Quantity Receipt • 471135

Summary Comments Attachments History

PO • P1341026

Line	Item	Catalog No.	Quantity	Status
1	ThinkFast Dock	22408	0	Received
2	45w Power Adapter	ADT887	1	Received

ITEM DETAILS

Contract No.: no value

Attachments: Add

Notes: 1000 characters remaining

Previous Receipts: 471125

ITEM DETAILS

Contract No.: no value

Attachments: Add

Previous Receipts: 471125

Draft

Details

Creation Date: 11/17/2021 3:49:24 PM

Source: Manual

Supplier: Lenovo (United States) Inc

Received by: Bridget Brown

Total (64.59 USD)

Subtotal: 64.59

64.59

Related Documents

Purchase Order: P1341026

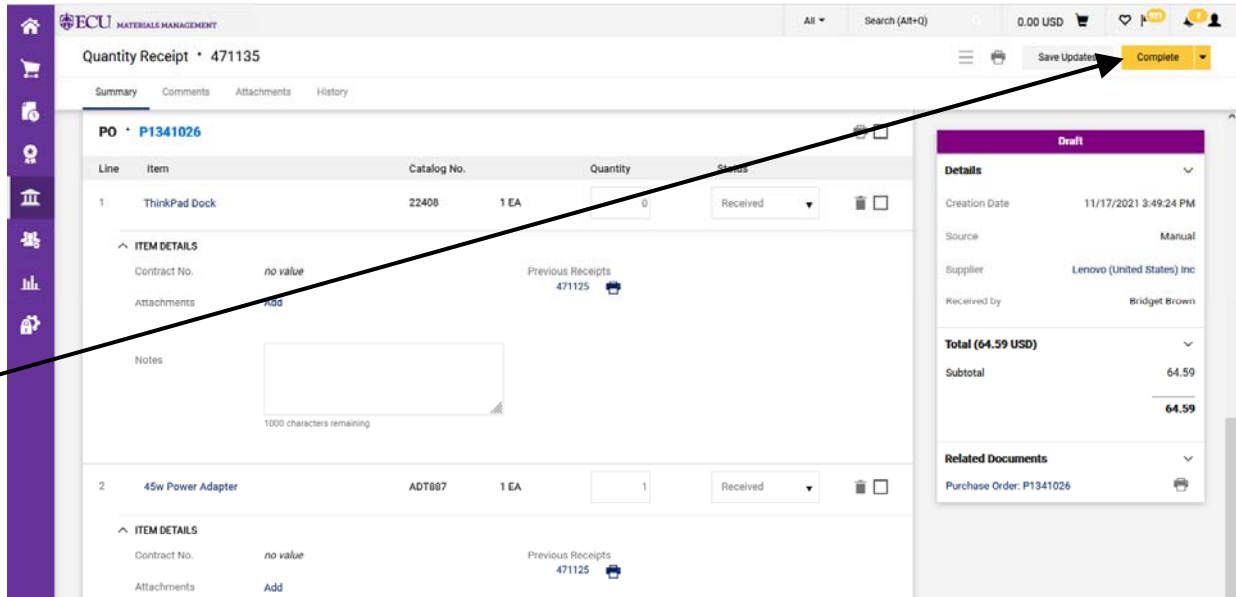
23.

24.

23. 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.
24. Notice our 1st receipt # listed in **Previous Receipts** section.

RECEIVING

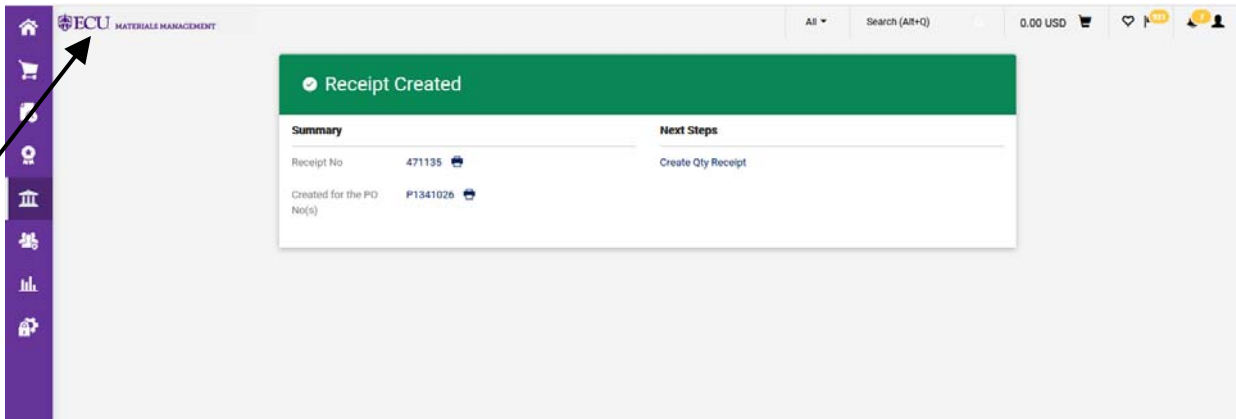
Last Updated on: 11/17/2021



25.

25. Click the **Complete** button.

Note: To continue completing receipts until all the items are received, repeat steps 15 – 25.



26.

26. To print a copy of the receipt, repeat steps 11 – 13. 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: 11/18/2021

ECU MATERIALS MANAGEMENT

Quick Search (Alt+Q)

Purchase Orders

P1315389

Receipts

388927

ECU Catalogs

amazon ProCard

CDWG ProCard

Heber Scientific ProCard

Life Sciences ProCard

Low Connecticut ProCard

Office DEPOT ProCard

STAPLES ProCard

vwr ProCard

ACRO ProCard

FIRSTENAL ProCard

GRAINGER ProCard

BIO-RAD ProCard

IMPORTANT - ProCard Only Suppliers < \$5,000

- 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

Click link for new Return Process procedure - [Return Process](#)

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-supplermgmt@ecu.edu or 737-5325

New Contract Information

Customer Guidelines for Shred-it Service
Customer Guidelines for Kinston Refrigeration

Materials Management Forms

1. Enter the PO # in the **Quick Search** popup menu and click on magnifying glass.

ECU MATERIALS MANAGEMENT

Quick Search (Alt+Q)

Purchase Orders

P1315389

Receipts

388927

ECU Catalogs

amazon ProCard

CDWG ProCard

Heber Scientific ProCard

Life Sciences ProCard

Low Connecticut ProCard

Office DEPOT ProCard

STAPLES ProCard

vwr ProCard

ACRO ProCard

FIRSTENAL ProCard

GRAINGER ProCard

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TSM - Banner ID Information

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Contact ECU Supplier Management with any questions:
ecu-supplermgmt@ecu.edu or 737-5325

New Contract Information

Customer Guidelines for Shred-it Service
Customer Guidelines for Kinston Refrigeration

Materials Management Forms

2. Click on **Purchase Order**.

RECEIPTS FOR PURCHASE ORDER

Last Updated on: 11/18/2021

Purchase Order · P1315389 Revision 0

Status Summary Revisions 1 Confirmations Shipments Change Requests **Receipts 1** Invoices Comments Attachments 1 History

General Information

PO/Reference No. P1315389
Revision No. 0
Supplier Name Lenovo (United States) Inc
Purchase Order Date 4/7/2020
Total 6,426.88
Requisition Number 2942073 view | print
Requestor Name Bridget Brown
Requestor Email komegaych@ecu.edu
Requestor Phone +1 252-328-1013

Document Status

Workflow Completed (4/7/2020 10:00 AM)
The system distributed the purchase order using the method(s) indicated below the last time it was distributed: view
Email (Plain Text) b2btest@lenovo.com
Distribution Date/Time 4/7/2020 9:59 AM
Supplier Sent To Supplier

Line Details

Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
<input checked="" type="checkbox"/>	Mid-Level Laptop - ThinkPad T490 CTO	20N3CT01WW	EA	1,396.72	4 EA	5,586.88

Supplier Receiving Invoicing Matching
Sent To Supplier Partially Received none Do not Match

Completed

Details

Supplier Status Sent To Supplier
Supplier Lenovo (United States) Inc
Total (6,426.88 USD)
Subtotal 6,426.88
Shipping 0.00
Handling 0.00
6,426.88

Related Documents
Requisitions: 2942073

What's next?
Workflow Status Completed
Workflow Submitted 4/7/2020 9:58 AM Bridget Brown

3. Click on **Receipts** tab.

Purchase Order · P1315389 Revision 0

Status Summary Revisions 1 Confirmations Shipments Change Requests **Receipts 1** Invoices Comments Attachments 1 History

Records found: 1

No.	Receipt Date	Cost Amount	Received by
388927	4/7/2020	-	Brown, Bridget

Line Details

No.	Product Name	Catalog No.	Unit Price	Qty/UOM	Extended Price
1	Mid-Level Laptop - ThinkPad T490 CTO	20N3CT01WW	1,396.72 USD	4 EA	5,586.88 USD
			Qty / Cost (In)	Qty / Cost (Out)	Status
			2	2	Open
					Net Received
2	ThinkPad USB-C Dock Gen 2	40AS0090US	165.00 USD	4 EA	660.00 USD
			Qty / Cost (In)	Qty / Cost (Out)	Status
			4		Open
3	Lenovo 65W Standard AC Adapter (USB Type-C) - US/Can/Mex	4X20M26268	45.00 USD	4 EA	180.00 USD
			Qty / Cost (In)	Qty / Cost (Out)	Status

Completed

Details

Supplier Status Sent to supplier
Supplier Lenovo (United States) Inc
Total (6,426.88 USD)
Subtotal 6,426.88
Shipping 0.00
Handling 0.00
6,426.88

Related Documents
Requisitions: 2942073

What's next?
Workflow Status Completed
Workflow Submitted 4/7/2020 9:58 AM Bridget Brown
 Final PO Review Approved Chance Komegay

4. The **Status** column indicates that the items were received.

5. To view the receipt, click on the **receipt number**.

RECEIPTS FOR PURCHASE ORDER

Last Updated on: 11/18/2021

The screenshot displays the 'Quantity Receipt' interface for receipt number 388927. The main content area shows receipt details in a table format:

Receipt Name	2020-04-07 brownb 04	Carrier	no value
Complete Date	4/7/2020 10:43:39 AM	Tracking No.	no value
Receipt No	388927	Receipt Type	no value
Receipt Date	4/7/2020	Attachments	Add
Packaging No.	no value	Notes	no value
Supplier Name	Lenovo (United States) Inc		
Received by	Bridget Brown		
Receipt Address	no value Attention: Bridget Brown Phone: +1 252-328-1013 Email: unknown@ecu.edu East Carolina University Social Work Ragsdale 104C Greenville, NC 278584353 United States		

On the right side, a 'Completed' summary panel shows:

- Creation Date: 4/7/2020 10:09:33 AM
- Completion Date: 4/7/2020 10:43:39 AM
- Source: Manual
- Supplier: Lenovo (United States) Inc
- Received by: Bridget Brown
- Total (2,793.44 USD): 2,793.44

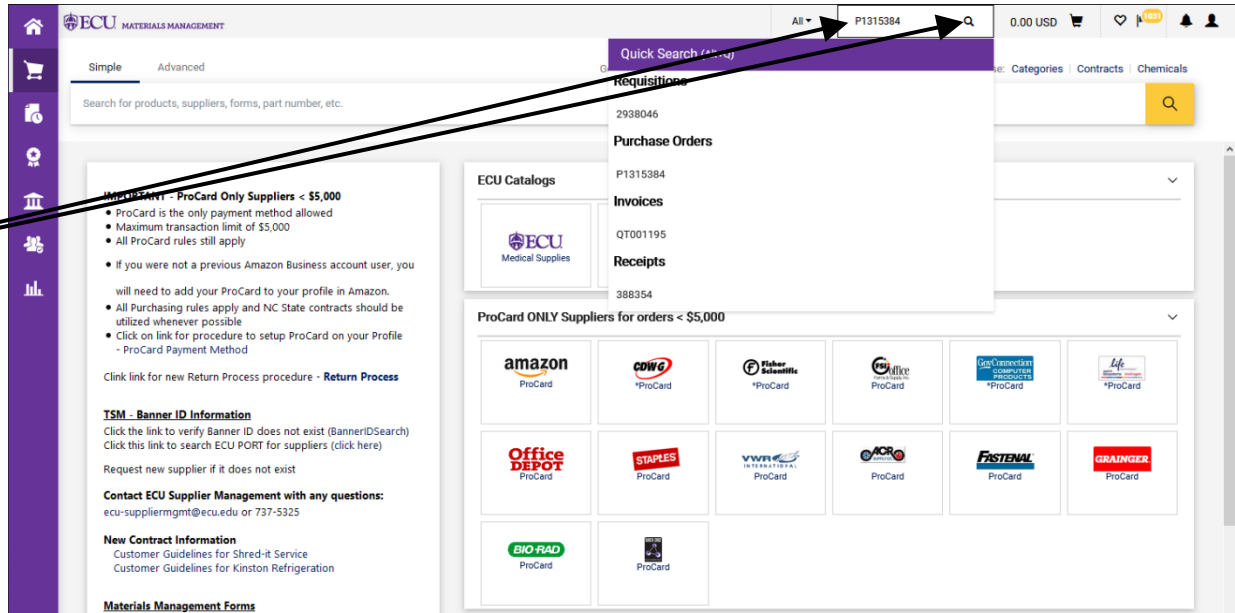
At the bottom, a table header for the purchase order P1315389 is visible:

Line	Item	Catalog No.	Quantity	Status	Add to Chemical
------	------	-------------	----------	--------	-----------------

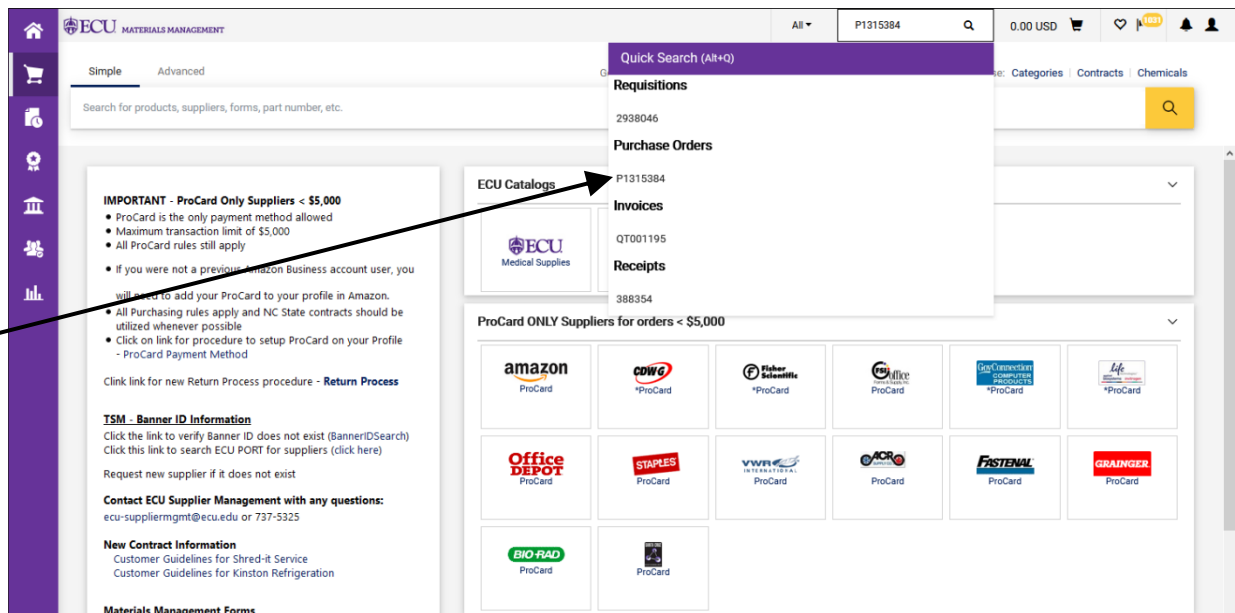
6. To print after reviewing, click the Printer icon. **Note:** Printing will launch a separate browser window or tab.
7. This completes the steps for this procedure. Click the **ECU** icon to go home.

INVOICES FOR PURCHASE ORDER

Last Updated on: 11/18/2021



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: 11/18/2021

3.

3. Click on the **Invoices** tab.

5.

4.

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

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	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

4. The **Status** column indicates which items have been invoiced and which are open.

5. To view the invoice, click on the invoice number.

INVOICES FOR PURCHASE ORDER

Last Updated on: 11/18/2021

The screenshot displays the ECU Materials Management interface for an invoice (QT001195) from Santa Cruz Biotech Inc. The interface is divided into several sections: General, Addresses, Note/Attachments, and a summary table. Callouts 6, 7, and 8 point to the home icon, printer icon, and scroll bar respectively.

General		Addresses		Note/Attachments	
Invoice Type	Invoice	Reemit To		External Note	no value
Pay Status	Payable	2116 Delaware Ave		Business	no value
Invoice Number	QT001195	Santa Cruz, California 95060		Purpose / Note	to Approvers
Supplier Invoice No.	no value	United States		External Attachments	
Supplier Name	Santa Cruz Biotech Inc	Phone 1-800-4573801		Attachments	
Invoice Date	4/2/2020	Address Id AP Accounts Payable 1			
Discount Date	4/4/2020	Bill To			
Due Date	5/1/2020	East Carolina University			
Terms	0% 2, Net 30	Accounts Payable			
Terms Discount	0.00 USD	120 Beaver St			
Invoice Name	2020-04-02 fontanasouth19 03	Fin. Srv. Bldg.			
Invoiced By	Lori Fontana-South	ACCOUNTSPAYABLE@ecu.edu			
Match Status	Do Not Match	Greenville, NC 27858-4353			
Invoice Source	Manual	United States			
Contains substituted item(s)	✗				

Payment Information		Discount, Tax, Shipping & Handling	
Accounting Date	4/2/2020	Discount, tax, shipping & handling	
F.O.B.	N/A	Allocation	Weighted
Payment Method	Unknown		Header-level
Record No.	no value	Discount	0.00 USD
Record Date	no value	Tax 1	0.00 USD
		Tax 2	0.00 USD
		Shipping	0.00 USD

Complete	
Santa Cruz Biotech Inc	
Total (68.95 USD)	
Subtotal	68.95
Discount	0.00
Tax1	0.00
Tax2	0.00
Shipping	0.00
Handling	0.00
	68.95

Related Documents

- Purchase Order: P1315384
- Requisitions: 2938046

What's next?

- Submitted: 4/2/2020 10:26 AM, Lori Fontana-South
- Send to Banner: Completed
- Completed: 4/2/2020 10:26 AM

6. You may need to scroll down the **Invoice** to see all the information.
7. To open a print version of the invoice, click the **Printer** icon. **Note:** The printer feature will launch a separate browser tab or window for printing.
8. This completes the steps for this procedure. Click the **ECU** icon to go home.

RE-OPEN, DELETE, AND ADD COMMENTS TO RECEIPTS

Last Updated on: 11/22/2021

Purchase Order - P1341813 Revision 0

Status Summary Revisions 1 Confirmations Shipments Change Requests Receipts Invoices Comments Attachments 1 History

General Information

PO/Reference No. P1341813
Revision No. 0
Supplier Name Dell Marketing LP
Purchase Order Date 11/22/2021
Total 12,521.00
Requisition Number 3407735 view | print
Requestor Name Bridget Brown
Requestor Email happymail@ecu.edu
Requestor Phone +1 252-328-6434

Document Status

Workflow Completed (11/22/2021 3:12 PM)
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 11/22/2021 3:11 PM
Supplier Sent To Supplier

Line Details

Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Dell Optiplex 5040	4365435454	EA	1,025.00	7 EA	7,175.00
DETAILS						
		Supplier	Receiving	Invoicing	Matching	
		Sent To Supplier	Fully Received With Returns	none	Do not Match	
2 <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Dell Latitude 6540	769876954756	EA	1,250.00	3 EA	3,750.00

Completed

Details

Supplier Status Sent To Supplier
Supplier Dell Marketing LP

Total (12,521.00 USD)

Subtotal 12,521.00
Shipping 0.00
Handling 0.00
12,521.00

Related Documents

Requisitions: 3407735

What's next?

Workflow Status Completed
Workflow Completed

Submitted
11/22/2021 3:06 PM
Bridget Brown

Final PO Review
Approved Charles Boulineau

4. Click on **Receipts** tab.

Purchase Order - P1341813 Revision 0

Status Summary Revisions 1 Confirmations Shipments Change Requests Receipts Invoices Comments Attachments 1 History

Records found: 2

No.	Receipt Date	Cost Amount	Received by
472397 <input checked="" type="checkbox"/>	11/22/2021	-	Brown, Bridget
472396 <input checked="" type="checkbox"/>	11/22/2021	-	Brown, Bridget

Line Details

No.	Product Name	Catalog No.	Unit Price	Qty/UOM	Extended Price
1	<input checked="" type="checkbox"/> Dell Optiplex 5040	4365435454	1,025.00 USD	7 EA	7,175.00 USD
		Qty / Cost (In)	Qty / Cost (Out)	Status	
		7		Net Received	
2	<input checked="" type="checkbox"/> Dell Latitude 6540	769876954756	1,250.00 USD	3 EA	3,750.00 USD
		Qty / Cost (In)	Qty / Cost (Out)	Status	
		3		Net Received	
3	<input checked="" type="checkbox"/> Dell Color LaserJet Printer D545	34565467547	399.00 USD	4 EA	1,596.00 USD
		Qty / Cost (In)	Qty / Cost (Out)	Status	

Completed

Details

Supplier Status Sent To Supplier
Supplier Dell Marketing LP

Total (12,521.00 USD)

Subtotal 12,521.00
Shipping 0.00
Handling 0.00
12,521.00

Related Documents

Requisitions: 3407735

What's next?

Workflow Status Completed
Workflow Completed

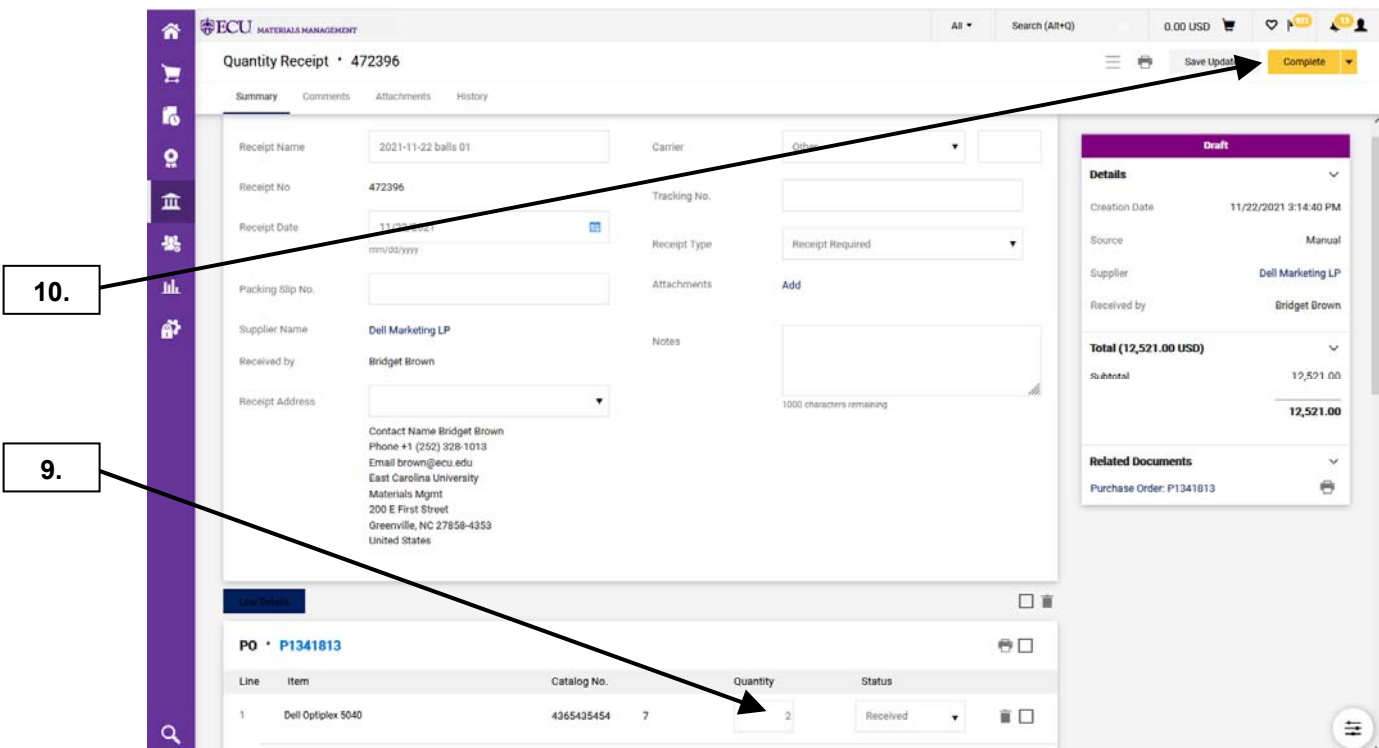
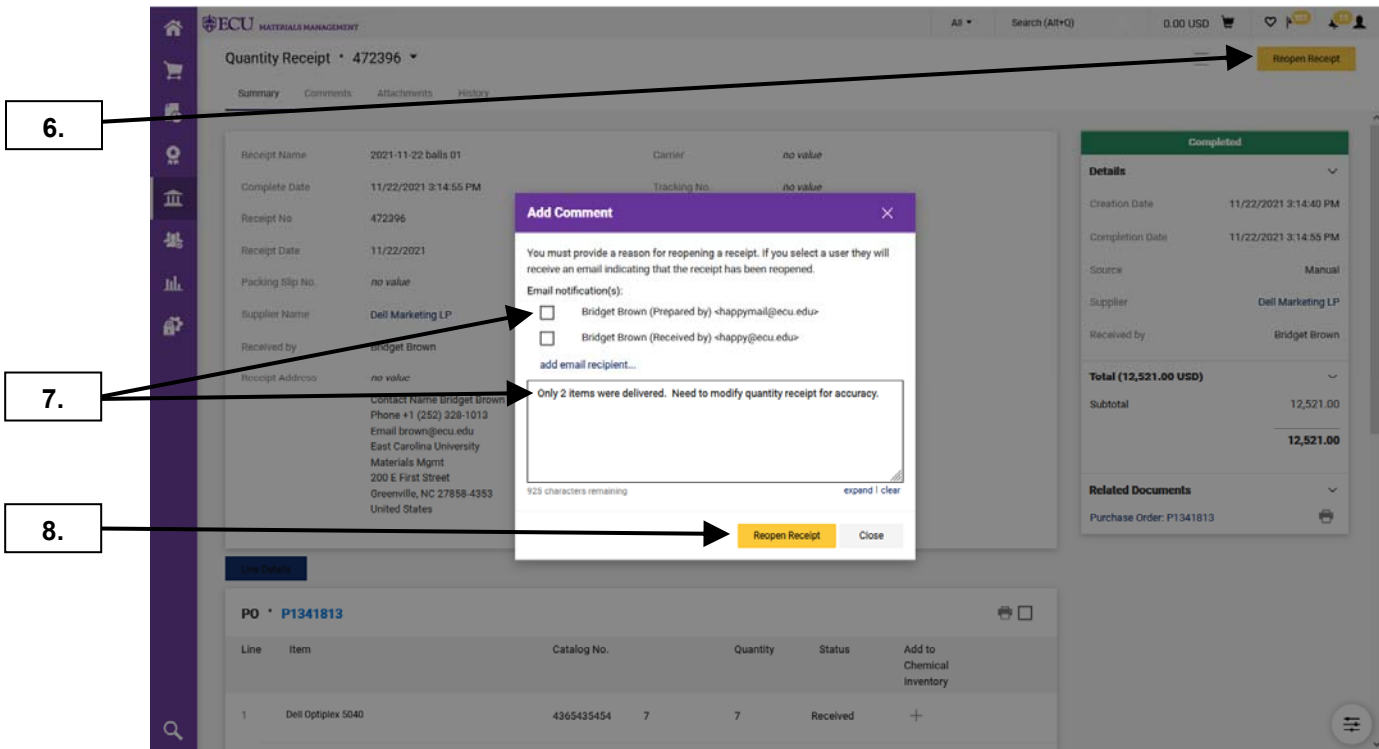
Submitted
11/22/2021 3:06 PM
Bridget Brown

Final PO Review
Approved Charles Boulineau

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.

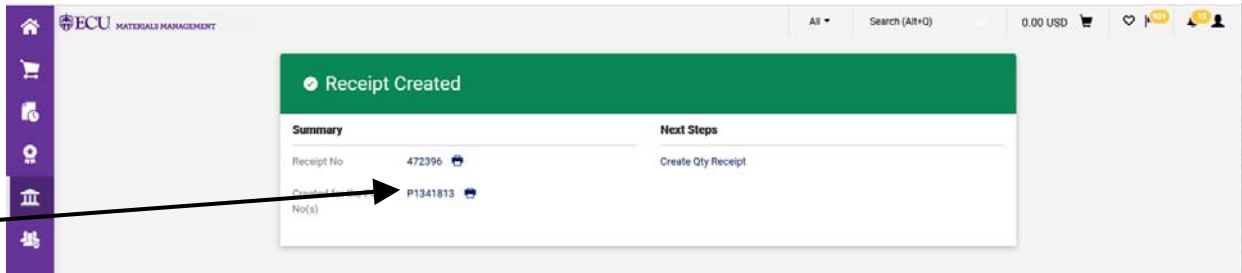
RE-OPEN, DELETE, AND ADD COMMENTS TO RECEIPTS

Last Updated on: 11/22/2021

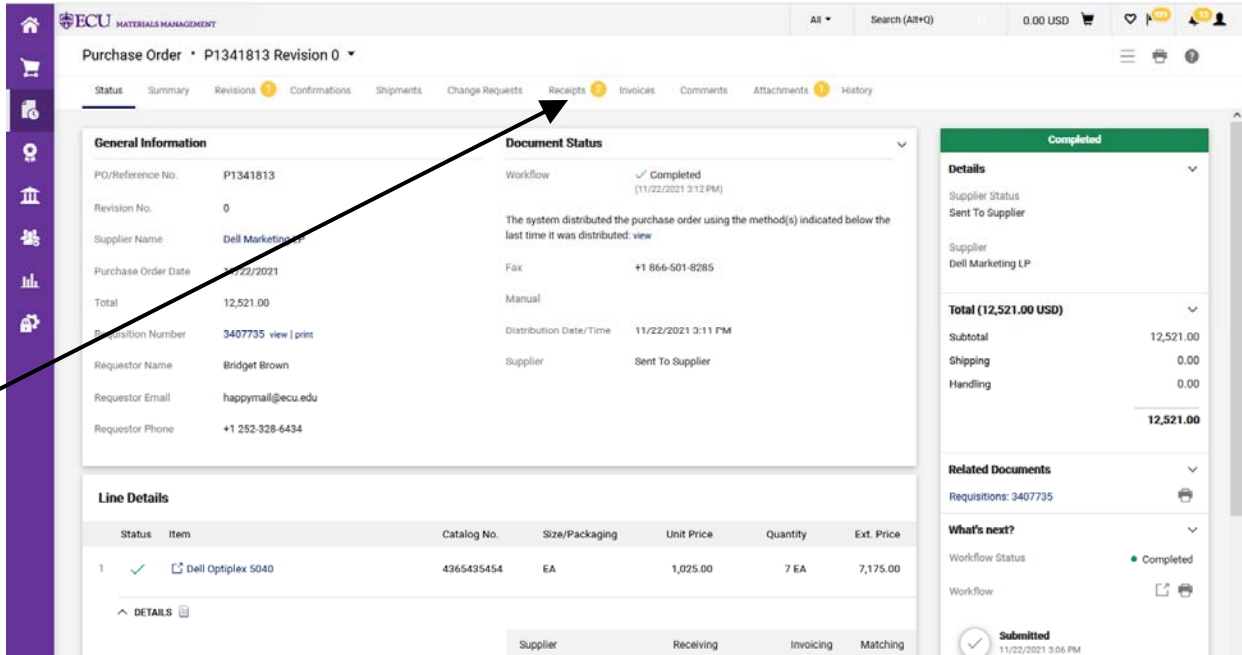


RE-OPEN, DELETE, AND ADD COMMENTS TO RECEIPTS

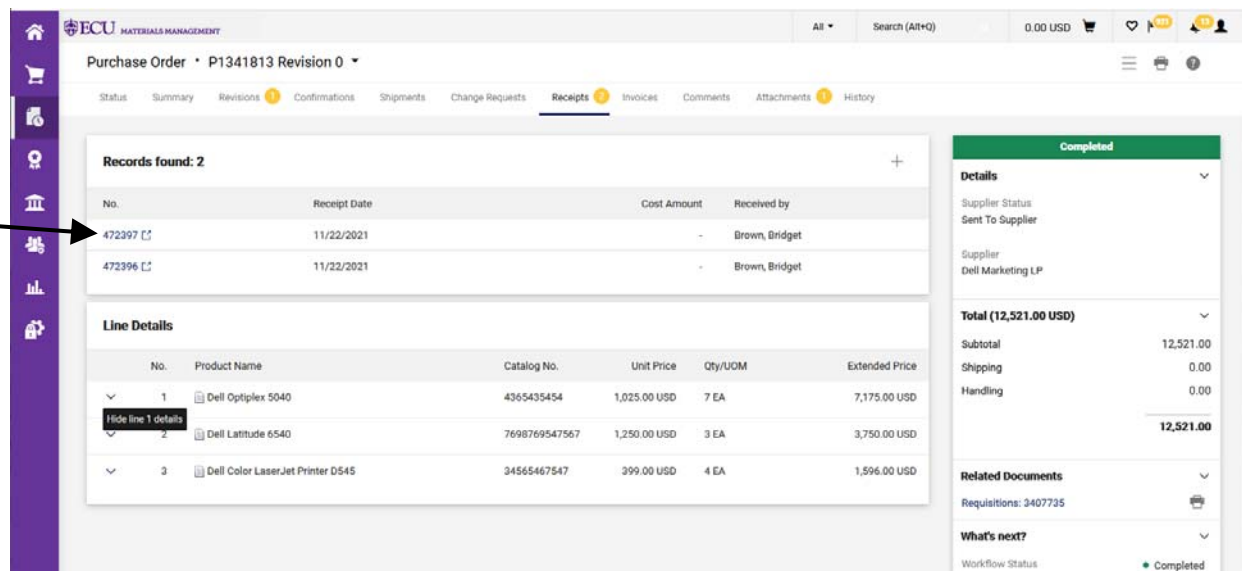
Last Updated on: 11/22/2021



11. Click the **PO #**.



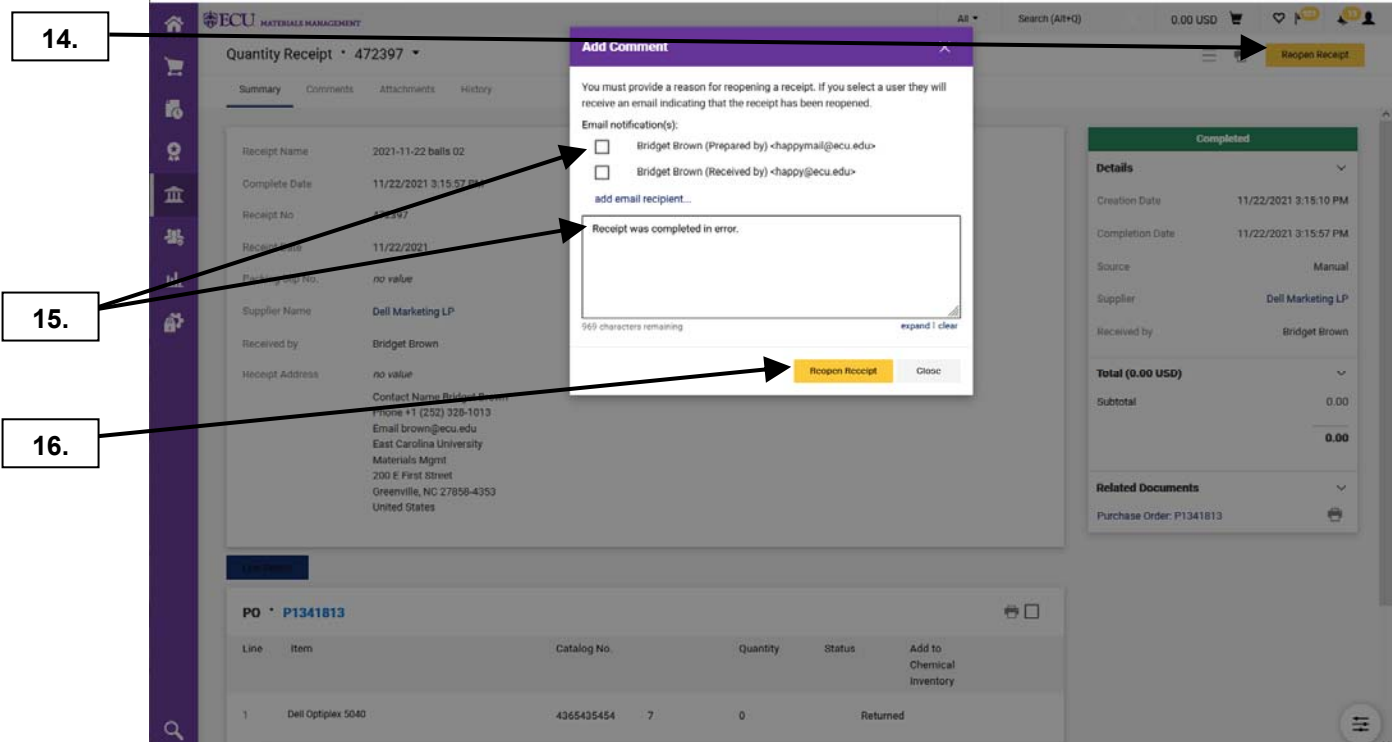
12. Click on **Receipts** tab. For 2nd example, we will delete an existing receipt.
Note: This action can only be accomplished the same day the receipt was created.



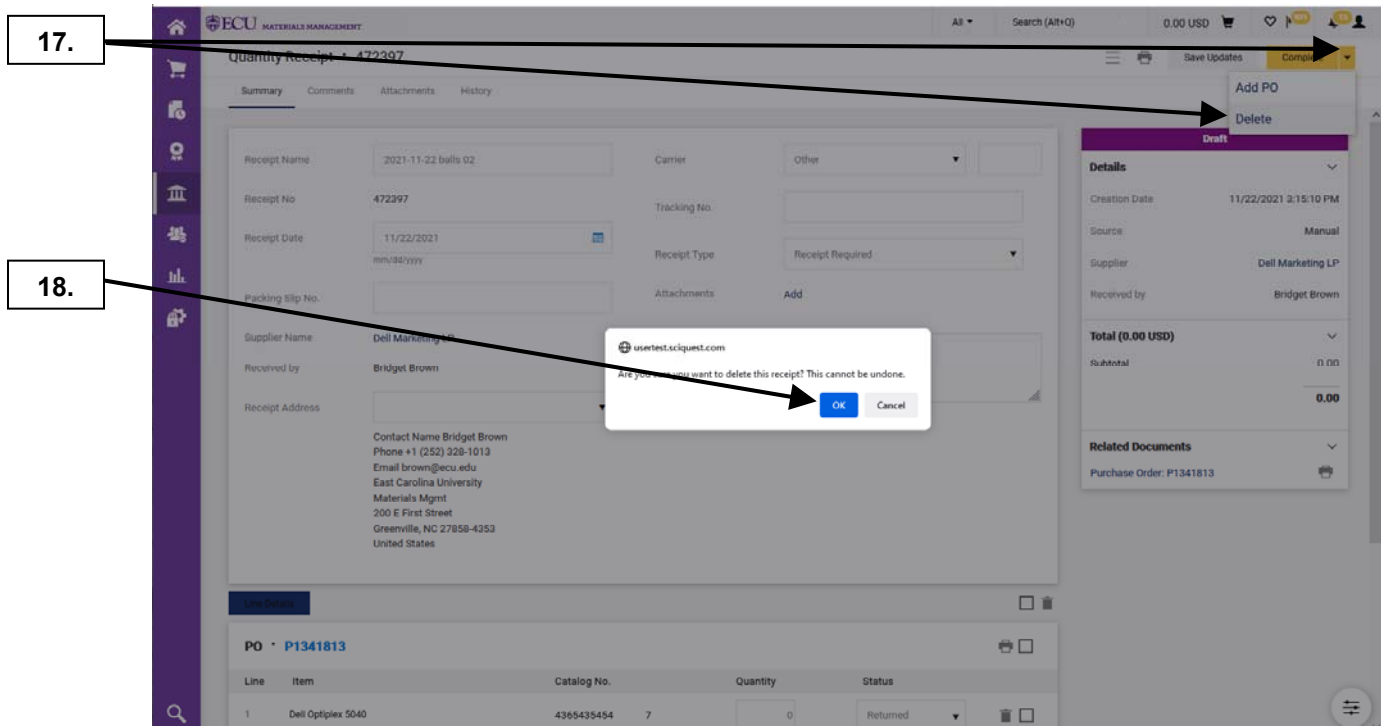
13. Click on receipt that you want to delete.

RE-OPEN, DELETE, AND ADD COMMENTS TO RECEIPTS

Last Updated on: 11/22/2021



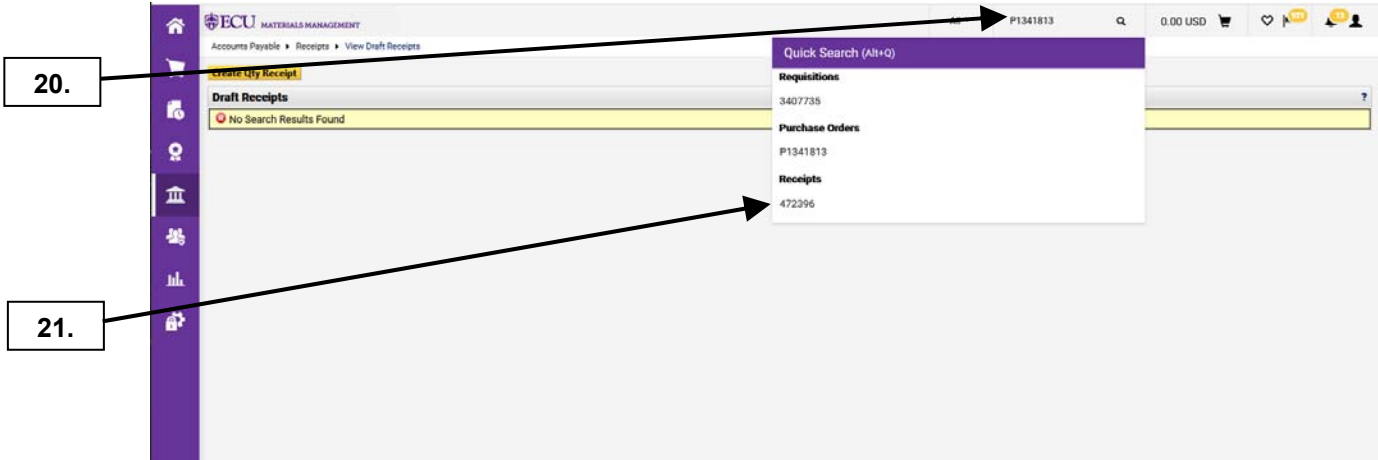
- 14. Click on **Reopen Receipt** button.
- 15. Provide the reason to reopen receipt by adding a comment in the **Add Comment** window. You can select PORT Users to notify regarding deletion of the receipt.
- 16. Click the **Reopen Receipt** button.



- 17. Click the **Complete** drop-down box and select the **Delete** option. **Note:** Once it has been deleted, the receipt cannot be recovered.
- 18. A confirmation pop-up window will be displayed. Click **OK** to confirm that you want to delete the receipt.

RE-OPEN, DELETE, AND ADD COMMENTS TO RECEIPTS

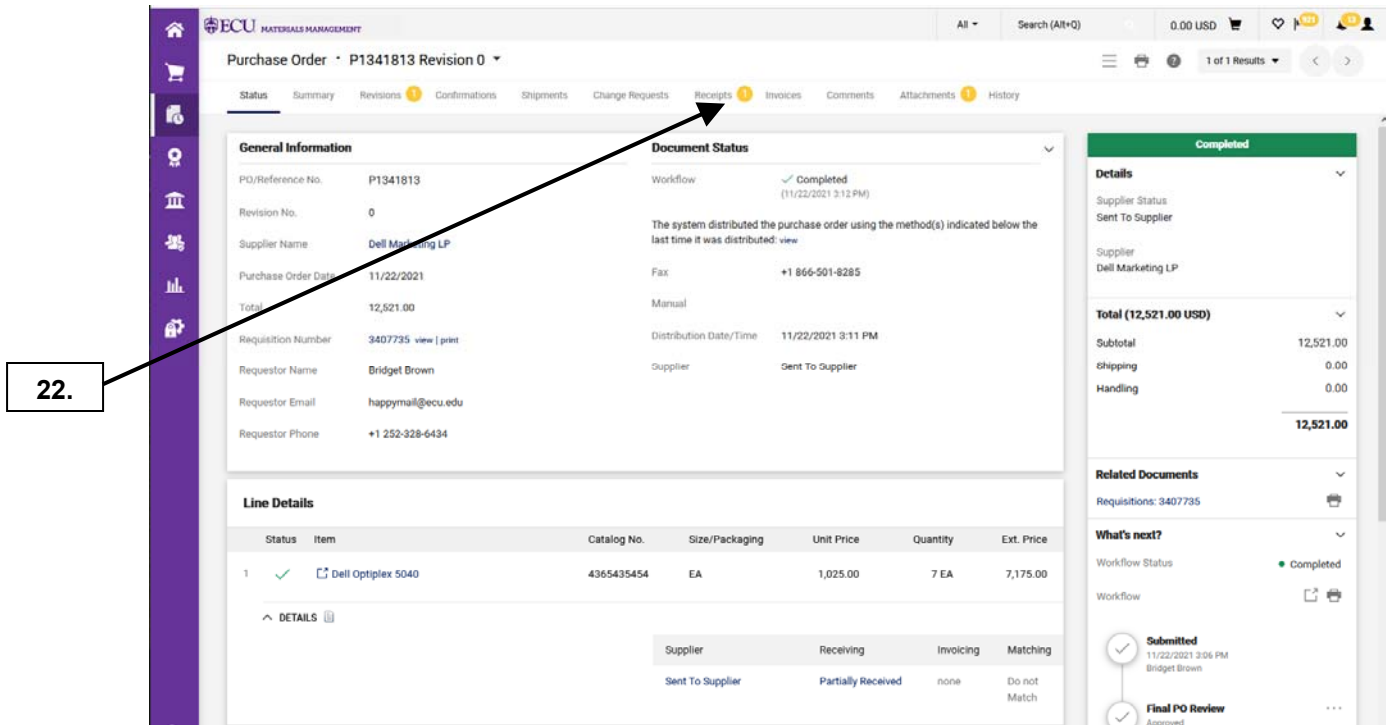
Last Updated on: 11/22/2021



19. This has deleted the reopened receipt.

20. To confirm, enter the **PO #** for **Quick Search**, Notice the demo receipt 472397 is no longer listed in the results.

21. Select **Purchase Order Number**.



22. Click on **Receipts** tab.

RE-OPEN, DELETE, AND ADD COMMENTS TO RECEIPTS

Last Updated on: 11/22/2021

Records found: 1

No.	Receipt Date	Cost Amount	Received by
472396	11/22/2021	-	Brown, Bridget

Line Details

No.	Product Name	Catalog No.	Unit Price	Qty/UOM	Extended Price
1	Dell Optiplex 5040	4365435454	1,025.00 USD	7 EA	7,175.00 USD
2	Dell Latitude 6540	7698769547567	1,250.00 USD	3 EA	3,750.00 USD
3	Dell Color LaserJet Printer D545	34565467547	399.00 USD	4 EA	1,596.00 USD

Total (12,521.00 USD)

Subtotal 12,521.00
Shipping 0.00
Handling 0.00
12,521.00

23.

23. Notice that there is only 1 receipt remaining and that 443864 has been deleted. Click on receipt to add a comment.

Quantity Receipt • 472396

Summary Comments Attachments History

Receipt Name 2021-11-22 balls 01 Carrier no value

Complete Date 11/22/2021 3:32:21 PM Tracking No. no value

Receipt No. 472396 Receipt Type Receipt Required

Receipt Date 11/22/2021 Attachments Add

Packing Slip No. no value Notes no value

Supplier Name Dell Marketing LP

Received by Bridget Brown

Receipt Address no value

Contact Name Bridget Brown
Phone +1 (252) 328-1013
Email brown@ecu.edu
East Carolina University
Materials Mgmt
200 E First Street
Greenville, NC 27858-4353
United States

PO • P1341813

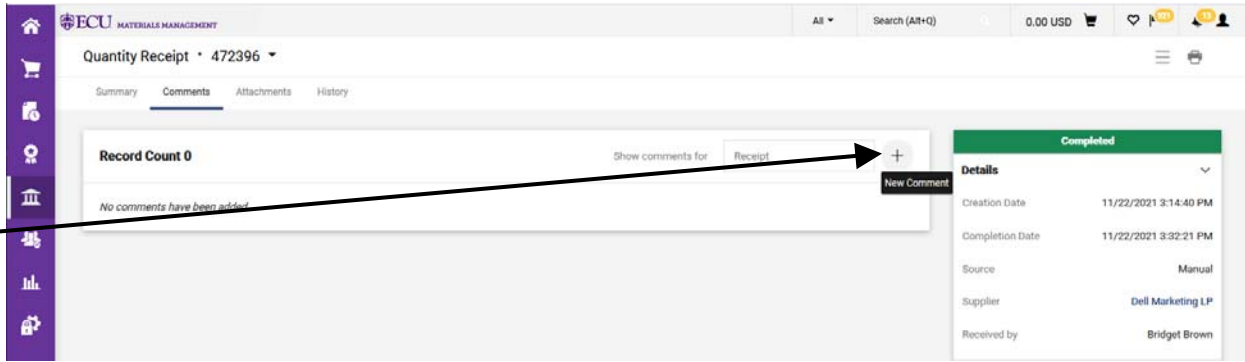
Line	Item	Catalog No.	Quantity	Status	Add to Chemical Inventory
1	Dell Optiplex 5040	4365435454	7	2	Received +

24.

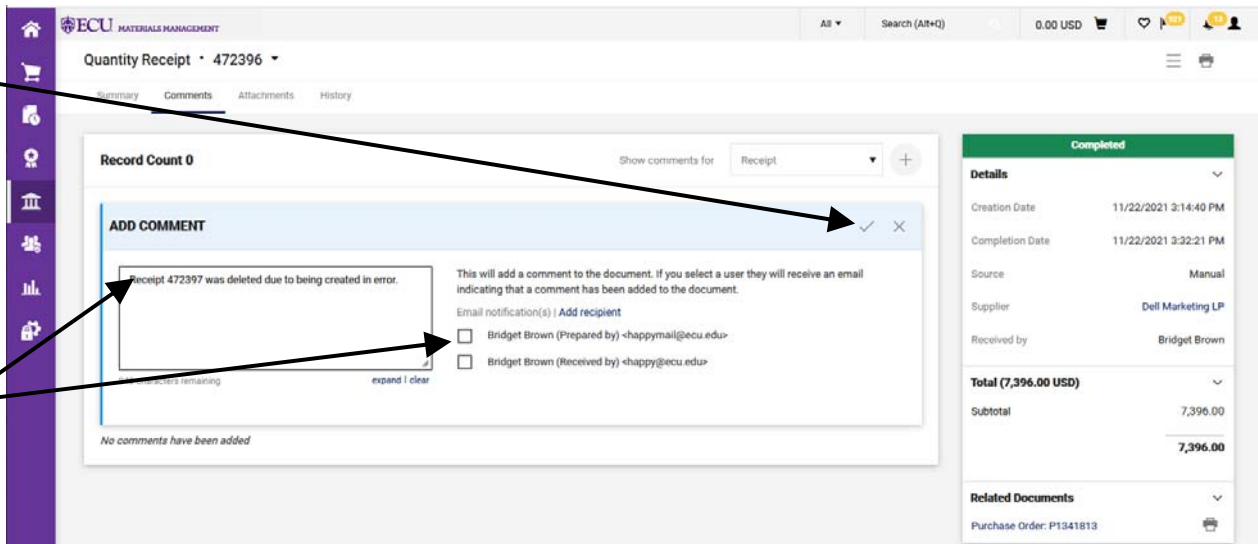
24. Click **Comments** tab.

RE-OPEN, DELETE, AND ADD COMMENTS TO RECEIPTS

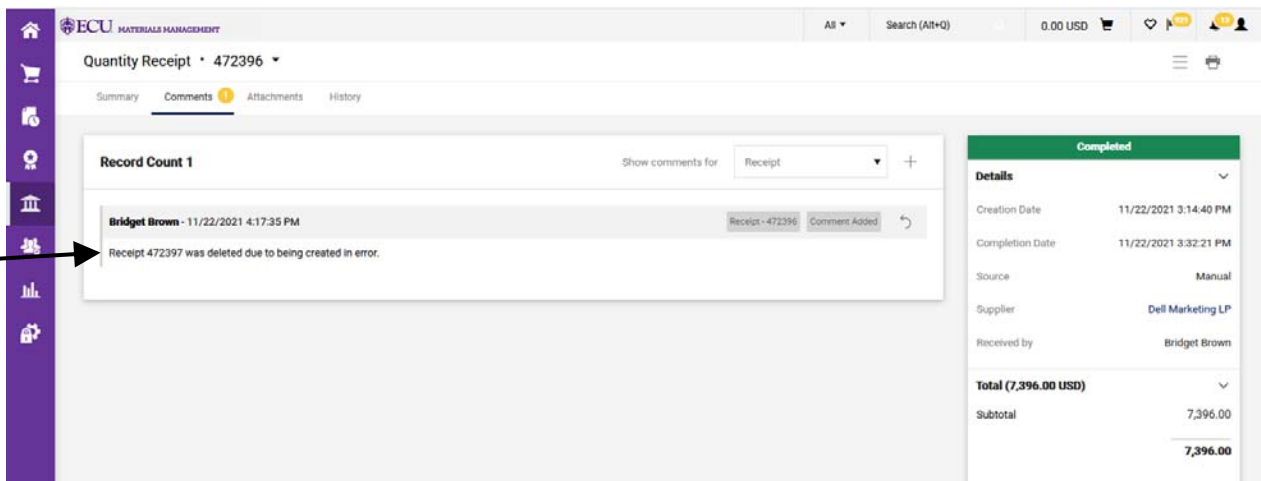
Last Updated on: 11/22/2021



25. Click on **Add Comment +** icon.



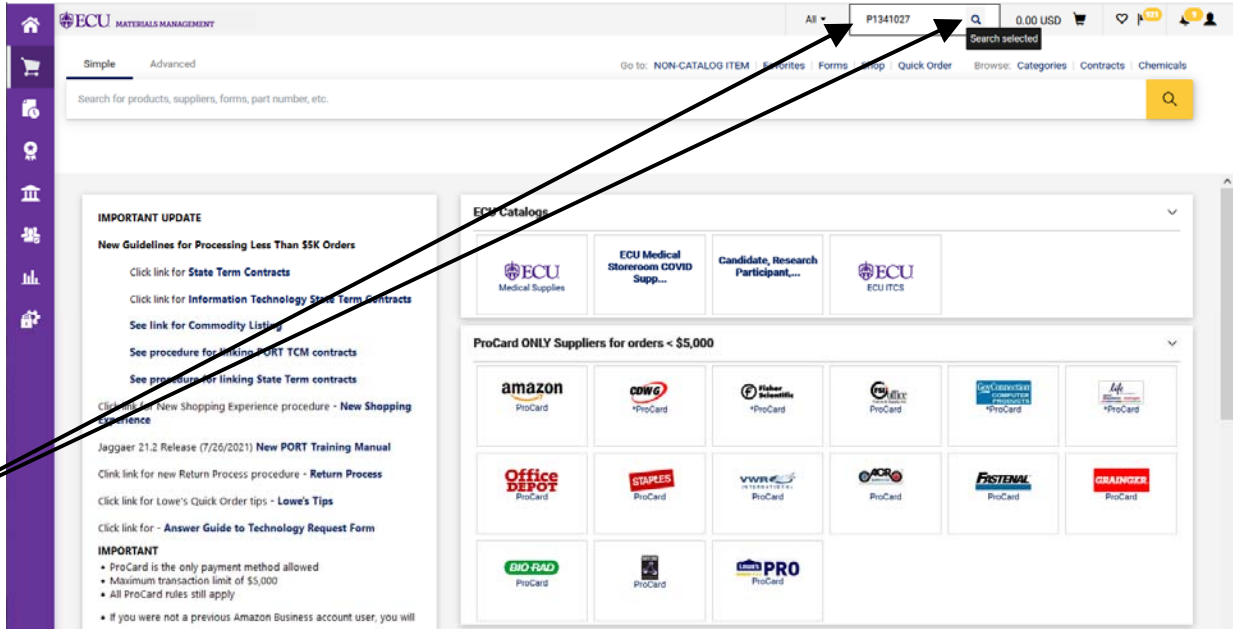
26. The **Add Comment** pop-up is displayed. You can select PORT Users to notify regarding the comment on the receipt. Enter a comment for the receipt.
27. Click the **Check** icon to save the comment.



28. The comment has been added to the receipt. **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.

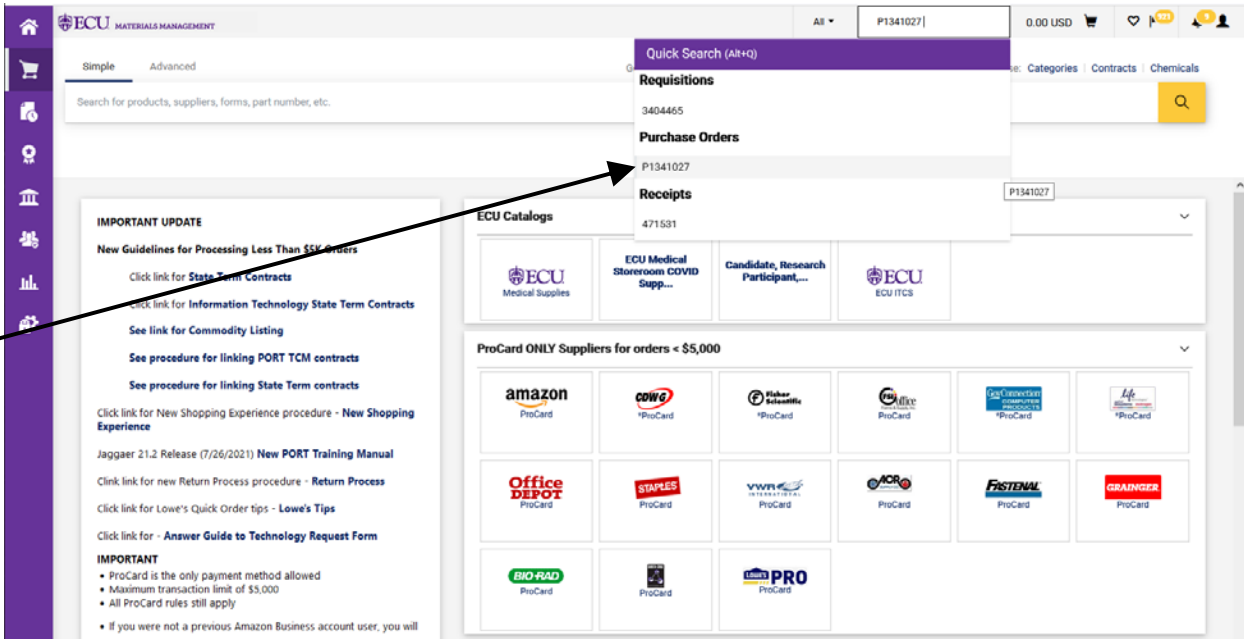
RETURN PROCESS

Last Updated on: 11/18/2021



1.

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.

2. Click on the PO # within the **Quick Search** fly-out menu.

RETURN PROCESS

Last Updated on: 11/18/2021

Purchase Order - P1341027 Revision 0

Status Summary Revisions **1** Confirmations Shipments Change Requests **Receipts** Invoices Comments Attachments **1** History

General Information

PO/Reference No. P1341027
Revision No. 0
Supplier Name Dell Marketing LP
Purchase Order Date 11/18/2021
Total 12,521.00
Requisition Number 3404465 view | print
Requestor Name Bridget Brown
Requestor Email happymail@ecu.edu
Requestor Phone +1 252-328-6434

Document Status

Workflow Completed (11/18/2021 3:23 PM)
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 11/18/2021 3:23 PM
Supplier Sent To Supplier

Line Details

Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	<input checked="" type="checkbox"/> Dell Optiplex 5040	4365435454	EA	1,025.00	7 EA	7,175.00

Completed

Details

Supplier Status Sent To Supplier
Supplier Dell Marketing LP

Total (12,521.00 USD)

Subtotal 12,521.00
Shipping 0.00
Handling 0.00
12,521.00

Related Documents

Requisitions: 3404465

What's next?

Workflow Status Completed
Workflow

3. Click on **Receipts** tab.

Purchase Order - P1341027 Revision 0

Status Summary Revisions **1** Confirmations Shipments Change Requests **Receipts** Invoices Comments Attachments **1** History

Records found: 1

No.	Receipt Date	Cost Amount	Received by
471531	11/18/2021	-	Brown, Bridget

Line Details

No.	Product Name	Catalog No.	Unit Price	Qty/UOM	Extended Price
1	<input checked="" type="checkbox"/> Dell Optiplex 5040	4365435454	1,025.00 USD	7 EA	7,175.00 USD
			Qty / Cost (In)	Qty / Cost (Out)	Status
			7		Net Received
2	<input checked="" type="checkbox"/> Dell Latitude 6540	7698769547567	1,250.00 USD	3 EA	3,750.00 USD
			Qty / Cost (In)	Qty / Cost (Out)	Status
			3		Net Received
3	<input checked="" type="checkbox"/> Dell Color LaserJet Printer D545	34565467547	399.00 USD	4 EA	1,596.00 USD
			Qty / Cost (In)	Qty / Cost (Out)	Status

Completed

Details

Supplier Status Sent To Supplier
Supplier Dell Marketing LP

Total (12,521.00 USD)

Subtotal 12,521.00
Shipping 0.00
Handling 0.00
12,521.00

Related Documents

Requisitions: 3404465

What's next?

Workflow Status Completed
Workflow

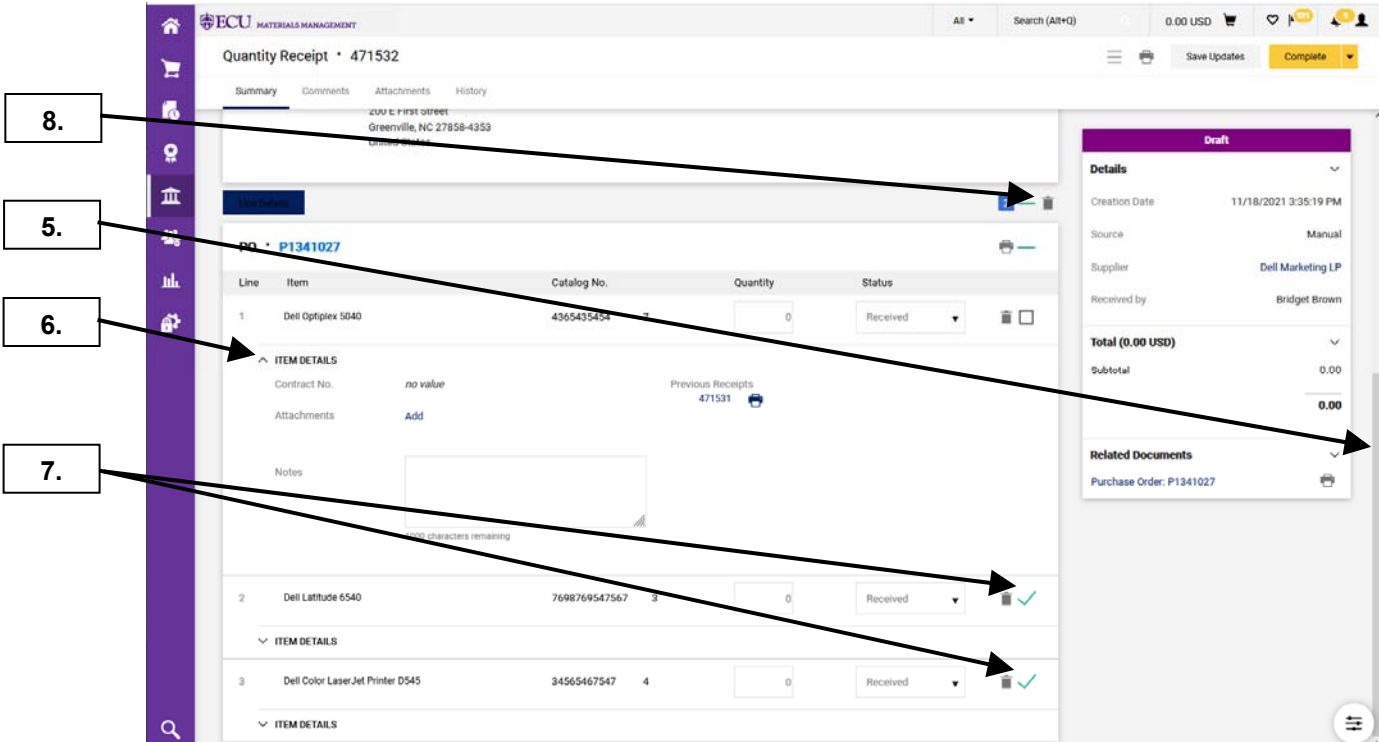
Submitted
11/18/2021 3:21 PM
Bridget Brown

Final PO Review
Approved

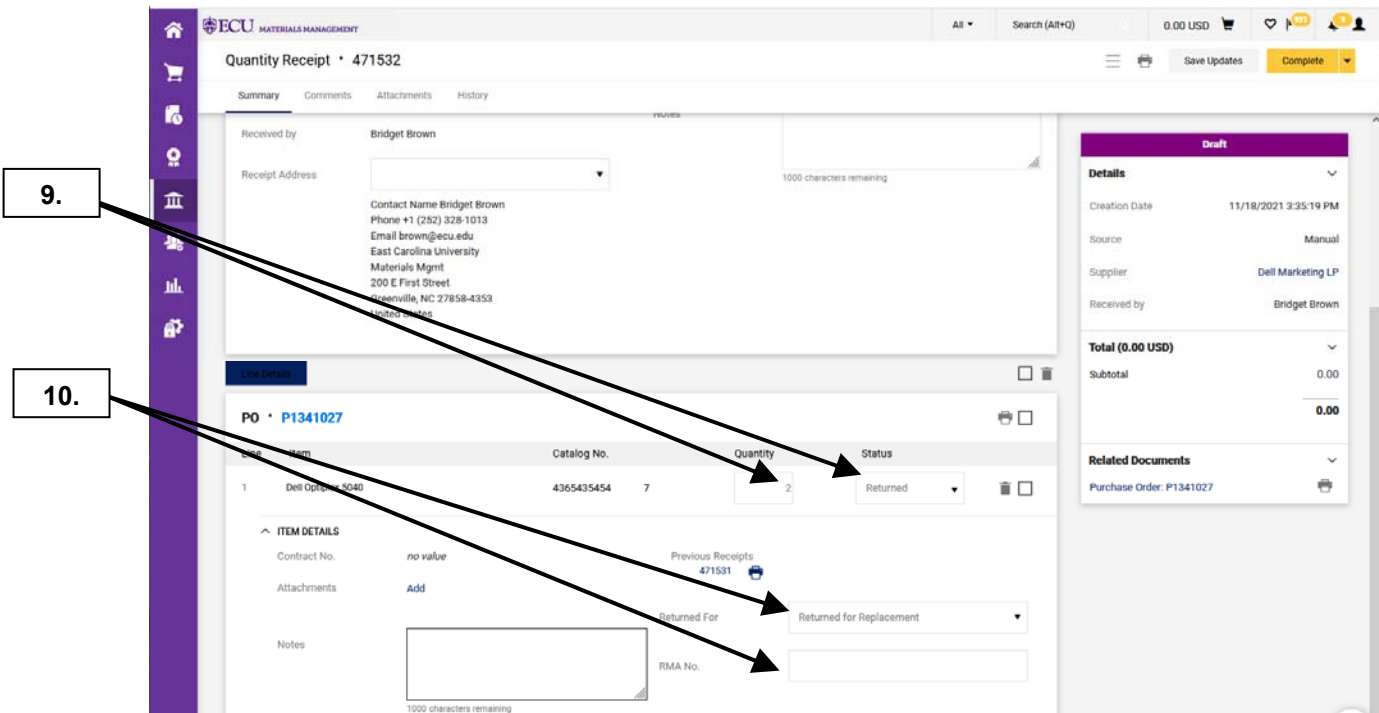
4. Click the add icon (+) to **Create Quantity Receipt**.

RETURN PROCESS

Last Updated on: 11/18/2021



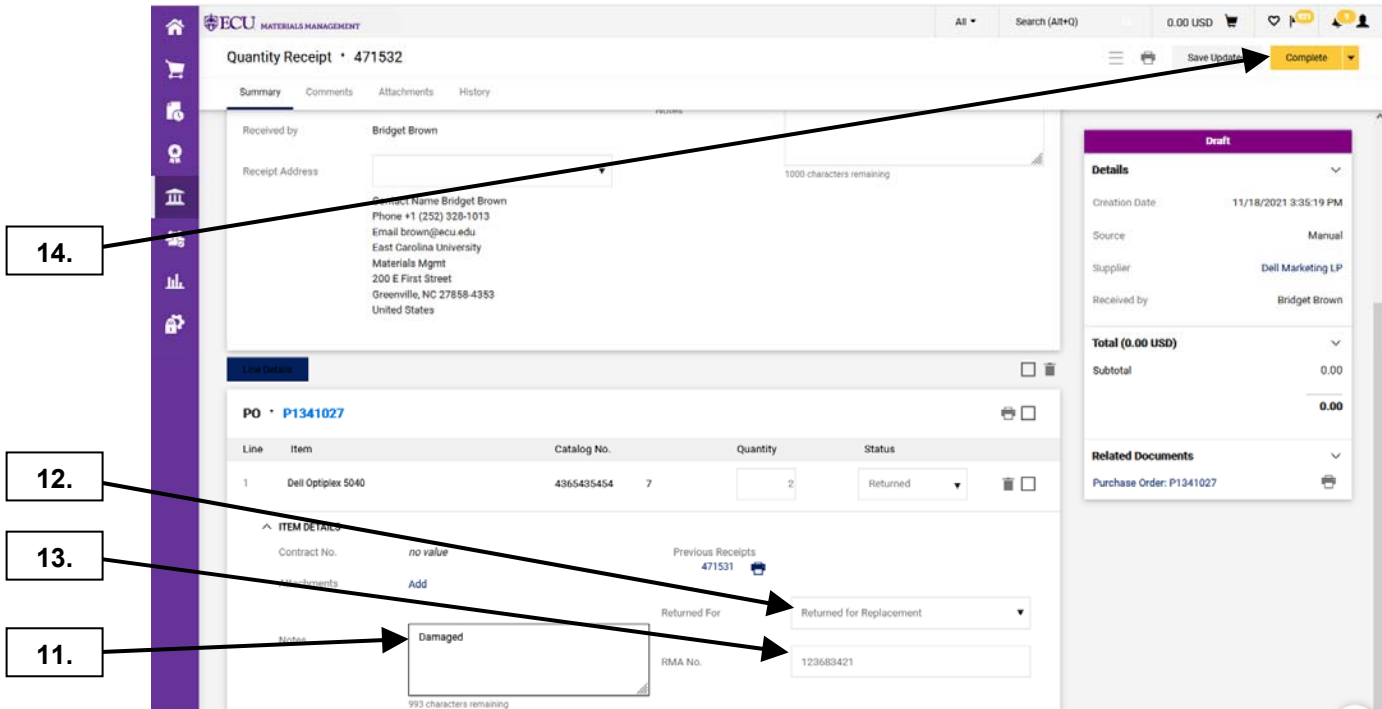
5. Scroll down the page to see the line-items for order.
6. If you click **Chevron Down**, item details will be hidden like line-items 2 and 3.
7. Check the items not being returned on your request, to remove them from the receipt.
8. Click **Remove Selected Items** icon for the item checked to remove them from the return receipt.



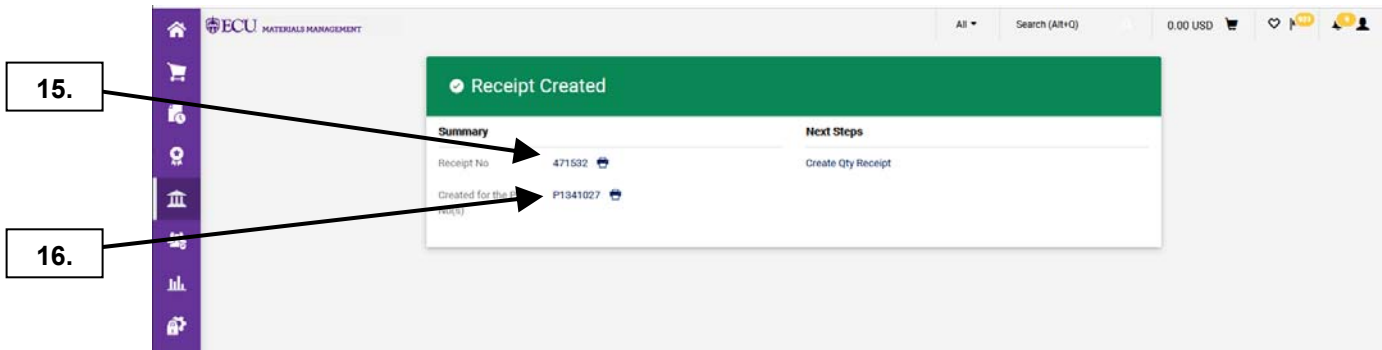
9. Enter the quantity of item(s) being returned and set **Line Status** to **Returned**.
10. Changing Status to **Returned** will enable **Returned For** and **RMA No.** fields

RETURN PROCESS

Last Updated on: 11/18/2021



11. 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
12. Select **Returned For** option. Either **Returned for Credit Memo** or **Return for Replacement**.
13. Enter the **RMA No.** provided by supplier.
14. Click on **Complete** button.



15. The **Receipt Number** and link is displayed for your return.
16. Click on the **PO Number** to add a comment about the returned item(s).

RETURN PROCESS

Last Updated on: 11/18/2021

The screenshot displays the 'Purchase Order' page for P1341027 Revision 0. The 'Comments' tab is selected in the navigation bar. The main content area shows 'General Information' and 'Line Details'. A callout box labeled '17.' points to the 'Comments' tab in the navigation bar.

Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
✓	Dell Optiplex 5040	4365435454	EA	1,025.00	7 EA	7,175.00

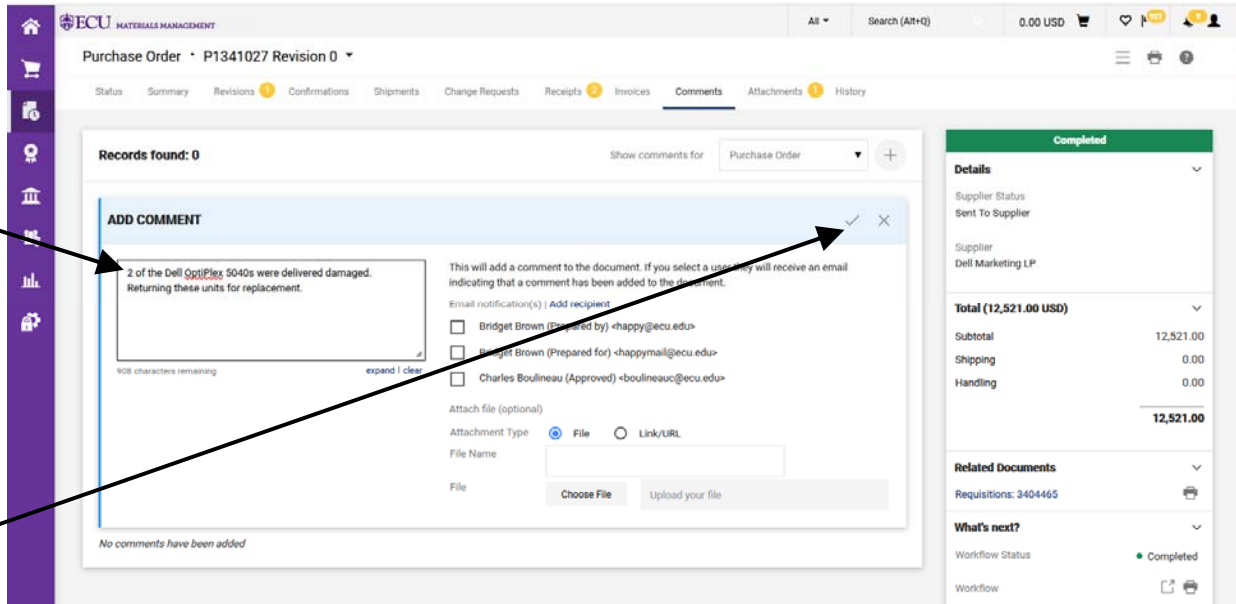
17. Click on the **Comments** tab.

The screenshot displays the 'Purchase Order' page for P1341027 Revision 0, with the 'Comments' tab selected. The main content area shows 'Records found: 0' and 'No comments have been added'. A callout box labeled '18.' points to the 'Add' icon (+) next to the 'Show comments for' dropdown.

18. Click on the **Add icon (+)** to add a comment indicating the reason for return for Materials Management and Accounts Payable.

RETURN PROCESS

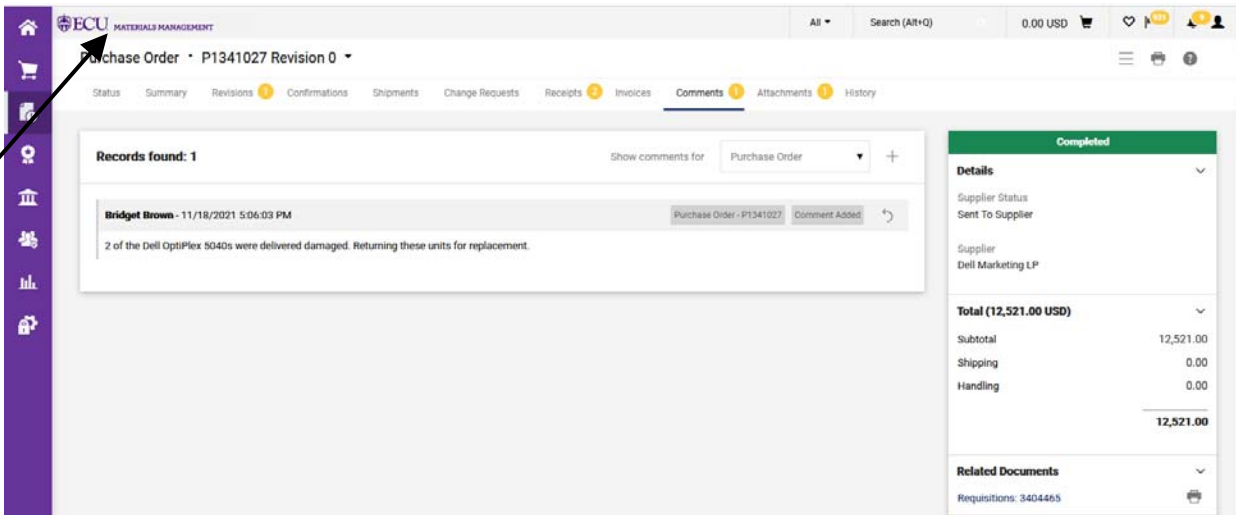
Last Updated on: 11/18/2021



19.

20.

19. 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.
20. Click the **Confirm icon** (✓) to add the comment.



21.

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

WITHDRAWING A REQUISITION

Last Updated on: 5/12/2021

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**.

Requisition Number	Supplier	Requisition Name	Requisition Status	Prepared For	Submitted Date	Total Amount
3087559	Dell Marketing LP	2020-10-22 brownb 01	Pending	Bridget Brown	10/22/2020 8:28:10 AM	2,500.00 USD
3053413	ECU Materials Management	2020-09-11 brownb 01	Pending	Bridget Brown	9/11/2020 3:24:36 PM	910.00 USD
2972463	Dell Marketing LP	2020-06-03 brownb 01	Pending	Bridget Brown	6/22/2020 4:14:26 PM	900.00 USD
2946357	Capital Ford Inc	2020-04-14 brownb 01	Pending	Bridget Brown	4/16/2020 9:22:11 AM	74,191.00 USD
2944826	A and B Cleaning Serv Inc	2020-04-09 brownb 04	Pending	Bridget Brown	4/9/2020 1:41:34 PM	888.00 USD
2939324	ECU Medical Storeroom	2020-04-03 brownb 01	Pending	Bridget Brown	4/8/2020 4:35:32 PM	195.88 USD
2941063	ECU Materials Management	2020-04-06 brownb 03	Pending	Bridget Brown	4/6/2020 4:23:35 PM	0.00 USD
2941048	ECU Materials Management	2020-04-06 brownb 02	Pending	Bridget Brown	4/6/2020 4:18:08 PM	0.00 USD

3. You can only withdraw requisitions that are pending approval. Note the Requisition Status column displayed on any requisition document search.

4. Click on the **Requisition No** that you need to withdraw.

3. You can only withdraw requisitions that are pending approval. Note the Requisition Status column displayed on any requisition document search.
4. Click on the **Requisition No** that you need to withdraw.

WITHDRAWING A REQUISITION

Last Updated on: 5/12/2021

Requisition : 2972463

Summary Taxes/S&H PO Preview Comments Attachments History

General Internal Note Order Info

Priority Normal
Department Administration and Finance (Administration and Finance)
Prepared by Bridget Brown
Cart Name 2020-06-03 brownb 01
Accounting Date no value
Accruals no value

Internal Note
Internal Info
Business Purpose / Note to Approvers
State Exempt Non State Funds
Internal Attachments

Order Info
Order Info
Backup Required
Pricing Ref # no value
Special Instructions None
Notes to Suppliers no value
Attachments for all suppliers
PO Clauses View details

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

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		

Pending
Total (900.00 USD)
Subtotal 900.00
Shipping 0.00
Handling 0.00
900.00

What's next?
Workflow
Submitted 6/22/2020 4:14 PM
Bridget Brown
Software Purchase Review Approved
Chance Kornegay
ADA Accessibility Review Approved
Chance Kornegay
Banner System Validation Completed
System
Org (Division) Approval Active

5. Click on the active workflow step to expand details.

Requisition : 2972463

Summary Taxes/S&H PO Preview Comments Attachments History

General Internal Note Order Info

Priority Normal
Department Administration and Finance (Administration and Finance)
Prepared by Bridget Brown
Cart Name 2020-06-03 brownb 01
Accounting Date no value
Accruals no value

Internal Note
Internal Info
Business Purpose / Note to Approvers
State Exempt Non State Funds
Internal Attachments

Order Info
Order Info
Backup Required
Pricing Ref # no value
Special Instructions None
Notes to Suppliers no value
Attachments for all suppliers
PO Clauses View details

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

FOAPAL / Ship Codes

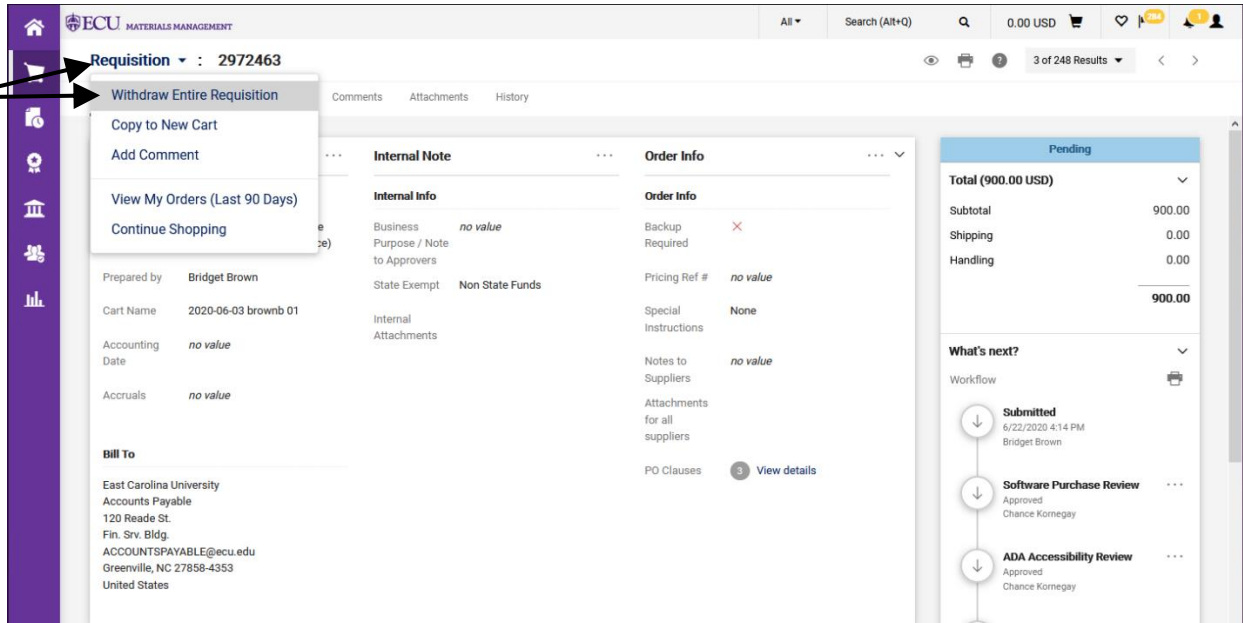
Organization: 230603 (AF Medical Stores); (0.00 - 4,999.99) USD
Charles Boulineau
boulineau@ecu.edu
+1 919-328-1924

Banner System Revalidation Future
Sent to MM Future

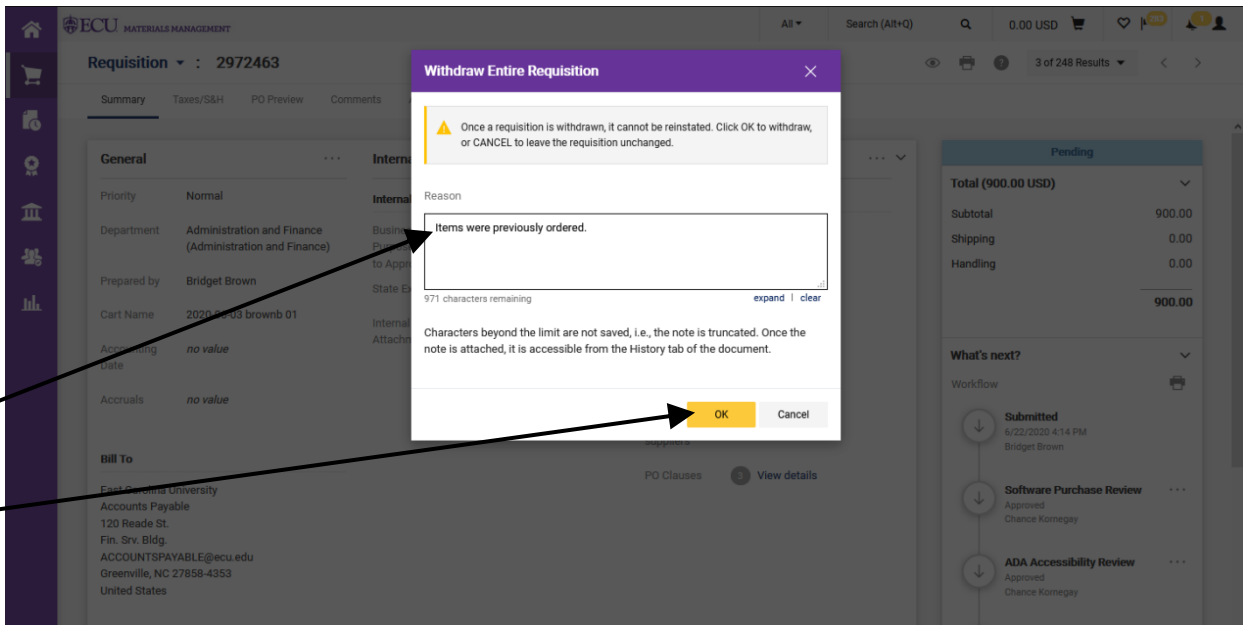
6. A list of approvers for the active approval queue will display in the expanded approval queue.
Note: Contact Division Approver, Materials Management, Central Storeroom, Medical Storeroom, HS Funds, Foundations, or Grants if you are planning to withdraw requisitions located in their queue.

WITHDRAWING A REQUISITION

Last Updated on: 5/12/2021



7. Select **Withdraw Entire Requisition** for the **Requisition** action drop down.



8. Type reason for withdrawing requisition.

9. Click the **OK** button.

WITHDRAWING A REQUISITION

Last Updated on: 5/12/2021

10.

Withdrawn

Total (0.00 USD)

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

What's next?

Workflow

- Draft**
6/22/2020 4:14 PM
Bridget Brown
- Software Purchase Review** ...
Approved
Chance Kornegay
- ADA Accessibility Review** ...
Approved
Chance Kornegay
- Banner System Validation** ...
Completed
System
- Org (Division) Approval** ...
Canceled (Withdrawn)

10. Notice that the status of the requisition indicates **Withdrawn**.

11. This completes the steps for this procedure. Click the **ECU** icon to go home.

CHANGE ORDER REQUEST

Last Updated on: 11/4/2022

The screenshot shows the ECU Materials Management website interface. On the left, there is a vertical navigation bar with icons for home, search, and various services. The main content area is divided into several sections:

- IMPORTANT UPDATE:** Contains links for 'Jaggaer 21.2 Release (7/26/2021) New PORT Training Manual', 'Return Process', 'Lowe's Quick Order tips - Lowe's Tips', 'Answer Guide to Technology Request Form', and 'Technology Request Exemption List'. It also includes an 'IMPORTANT' section with ProCard payment details and 'TSM - Banner ID Information'.
- ECU Catalogs:** A section titled 'ProCard ONLY Suppliers for orders < \$5,000' featuring logos for Amazon Business ProCard, CDW G ProCard, Fisher Scientific ProCard, Office ProCard, GoConnection ProCard, Life ProCard, ODP ProCard, STAPLES ProCard, VWR ProCard, ACR O ProCard, FASTenal ProCard, GRAINGER ProCard, and BIO-RAD ProCard.
- Computer Supplies:** Features logos for Apple, DELL, and Lenovo.
- Scientific / Medical Supplies:** A section with a right-pointing arrow.
- Forms:** A section containing five stickers: 'ECU Change Order Request Form', 'ECU Medical Supplies Special Order', 'ECU ProCard Technology Request', 'ECU Ship Code Maintenance', and 'ECU Technology Request'. The 'Change Order Request Form' sticker is highlighted with a black box and a number '1' to its left. An arrow points from this box to the sticker.

1. From the home page scroll down to find the **Forms** showcase. Click on **Change Order Request** sticker.

CHANGE ORDER REQUEST

Last Updated on: 11/4/2022

Form · Change Order Request Form

Supplier Info

Existing Supplier

Enter Supplier * Dell

Currency

Distribution Method *
The system will distribute purchase orders using
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 * Please select...

Requested Action

Details of Request

2.

3.

2. Begin typing name of the new supplier until you see the desired supplier displayed.
3. Select desired supplier name.

CHANGE ORDER REQUEST

Last Updated on: 11/4/2022

Form · Change Order Request Form

Supplier info

Existing Supplier

Supplier * Dell Marketing LP

Fulfillment Address **PO Purchase Order 1** - One Dell Way, Bldg RRB, Round Rock, Texas 78682-0384 United States

Currency USD

Distribution Method *
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 P1350487

Route to Buyer * Books White

Requested Action Delete item(s)

Details of Request Cancel line item 2. The product was discontinued by the manufacturer.

View Legacy Form

Add And Go To Cart

4. Notice supplier information has been populated.
5. 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**.
6. Click **Add and Go To Cart** button.

CHANGE ORDER REQUEST

Last Updated on: 11/4/2022

The screenshot shows the 'Shopping Cart' interface in the ECU Materials Management system. The cart contains one item: 'Dell Marketing LP - 1 Item - 0.00 USD'. The 'State Exempt' dropdown menu is highlighted with a red box, and an arrow points from a box labeled '7.' to it. The interface includes a search bar, a 'Proceed to Checkout' button, and a summary table on the right.

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	Change Order Request Form		0.00	Qty: 1	0.00

Estimate (0.00 USD)	
Subtotal *	0.00
Shipping	0.00
Handling	0.00
Total *	0.00

7. Click on drop down arrow... for **State Exempt**.

The screenshot shows the 'State Exempt' dropdown menu open, with 'None of the Above' selected. An arrow points from a box labeled '8.' to the selected option. Another arrow points from a box labeled '9.' to the 'Proceed to Checkout' button. The interface includes a search bar, a 'Proceed to Checkout' button, and a summary table on the right.

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	Change Order Request Form		0.00	Qty: 1	0.00

Estimate (0.00 USD)	
Subtotal *	0.00
Shipping	0.00
Handling	0.00
Total *	0.00

8. Select **None of the Above**. **Note:** You must select one of these options, but none really apply.

9. 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.

CHANGE ORDER REQUEST

Last Updated on: 11/4/2022

Requisition 3564212

Summary Taxes/S&H PO Preview Comments Attachments History

General

Priority: Normal

Prepared by: Bridget Brown

Prepared for: Bridget Brown

Cart Name: 2022-07-13 brownb 01

Accounting Date: no value

Accrues: no value

Internal Note

Business Purpose / Note to Approvers: no value

State Exempt: None of the Above

Internal Attachments: Add

Order Info

Backup Required: X

Pricing Ref #: no value

Special Instructions: None

Notes to Suppliers: no value

Attachments for all suppliers: Add

PO Clauses: 3 View details

Draft

Total (0.00 USD)

Subtotal: 0.00

Shipping: 0.00

Handling: 0.00

What's next for my order?

Next Step: Change Order Approval

Approver: Boulineau, Charles

Workflow:

- Draft (Active, Bridget Brown)
- Change Order Approval (Future)
- Approved Change Orders (Future)
- Finish (Future)

Bill To

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

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		

10. Notice steps the document will go through before the Change Order can be completed.

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).

11. Click on the **Submit Requisition** button.

Simple Advanced Go to: NON-CATALOG ITEM | Favorites | Forms | Shop | Quick Order Browse: Categories | Contracts | Chemicals

Search for products, suppliers, forms, part number, etc.

Requisition 3564212 Submitted

Summary

Requisition number	3564212
Requisition status	Pending
Cart name	2022-07-13 brownb 01
Requisition date	7/13/2022
Requisition total	0.00 USD
Number of line items	1

Options

- Print
- Recent orders
- Return to your home page

12. You can track the change order request with the **Requisition number** that is provided.

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

SHIP CODE MAINTENANCE

Last Updated on: 11/4/2022

1.

1. From the home page, navigate to the **Forms** showcase and click on **Ship Code Maintenance** sticker.

SHIP CODE MAINTENANCE

Last Updated on: 11/4/2022

5. Add And Go To Cart

2. Type of Ship Code request

3. Name *
Department *
Street
Building
Floor/Room
City *
State *

4. Provide reason if location is outside Greenville, NC.

2. Select either **Create New Ship Code** radio button or **Edit Existing Ship Code** radio button. **Note:** You need to provide the ship code if you're requesting an edit to an exist ship code
3. Provide the following information as appropriate for the shipping address: **Name (East Carolina University), Department, Street, Building, Floor / Room, City, State, and Zip Code.** **Note:** Provide the name if the ship code is outside Greenville, NC.
4. If you are requesting a ship code that is outside Greenville, NC, you will need to provide a business reason for the requested address.
5. Click the **Add and Go to Cart** button.

SHIP CODE MAINTENANCE

Last Updated on: 11/4/2022

The screenshot shows the ECU Materials Management interface. At the top, it says 'ECU MATERIALS MANAGEMENT' and '0.00 USD'. Below that, there's a 'Shopping Cart' header with 'Assign Cart' and 'Proceed To Checkout' buttons. The main form area has several fields: 'Priority' (Normal), 'Business Purpose / Note to Approvers', 'Backup Required', 'Special Instructions' (None), 'Prepared by' (Bridget Brown), 'Prepared for' (Bridget Brown), 'State Exempt' (with a dropdown menu open), and 'Notes to Suppliers'. The dropdown menu for 'State Exempt' lists options: Health Care -, Law Enforcement -, Maint of Campus Operations -, Non State Funds -, Public Safety -, Student Financial Aid -, * Existing Leases -, * Existing Maint Agreements -, * Existing Subscriptions -, and None of the Above -. Below the form, there's a table with one item: 'Ship Code Maintenance' with a quantity of 1 and an extended price of 0.00. On the right side, there's a 'Details' panel with an error message: 'Correct these issues. You are unable to proceed until addressed. Required: State Exempt'. Below the error message is an 'Estimate (0.00 USD)' table showing Subtotal, Shipping, Handling, and Total, all at 0.00.

7.

6.

6. Select **None of the Above** for **State Exempt** field.
7. Click the **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: 11/4/2022

Requisition 3564347

Summary Taxes/S&H PO Preview Comments Attachments History

General

Priority: Normal

Department: Administration and Finance (Administration and Finance)

Prepared by: Bridget Brown

Prepared for: Bridget Brown

Cart Name: 2022-07-13 brownb 02

Accounting Date: no value

Accruals: no value

Internal Note

Internal Info

Business Purpose / Note to Suppliers: no value

State Exempt: None of the Above

Internal Attachments: Add

Order Info

Backup Required: X

Pricing Ref #: no value

Special Instructions: None

Notes to Suppliers: no value

Attachments for all suppliers: Add

PO Clauses: 3 View details

Bill To

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

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	AF Medical Stores	Office Supplies	Default Program Code		

Draft

Total (0.00 USD)

Subtotal: 0.00

Shipping: 0.00

Handling: 0.00

0.00

What's next for my order?

Next Step: Forms Approval

Approver: Boulineau, Charles

Workflow

- Draft (Active) - Bridget Brown
- Forms Approval (Future)
- Finish (Future)

Submit Requisition

8. Notice the **Forms Approval** workflow step for this request. PORT Administrators are approvers for completing the request.
Note: Since this is a **Ship Code Maintenance 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).
9. Click the **Submit Requisition** button.

Simple Advanced Go to: NON-CATALOG ITEM Favorites Forms Shop Quick Order Browse: Categories Contracts Chemicals

Search for products, suppliers, forms, part number, etc.

Requisition 3564347 Submitted

Summary

Requisition number	3564347
Requisition status	Pending
Cart name	2022-07-13 brownb 02
Requisition date	7/13/2022
Requisition total	0.00 USD
Number of line items	1

Options

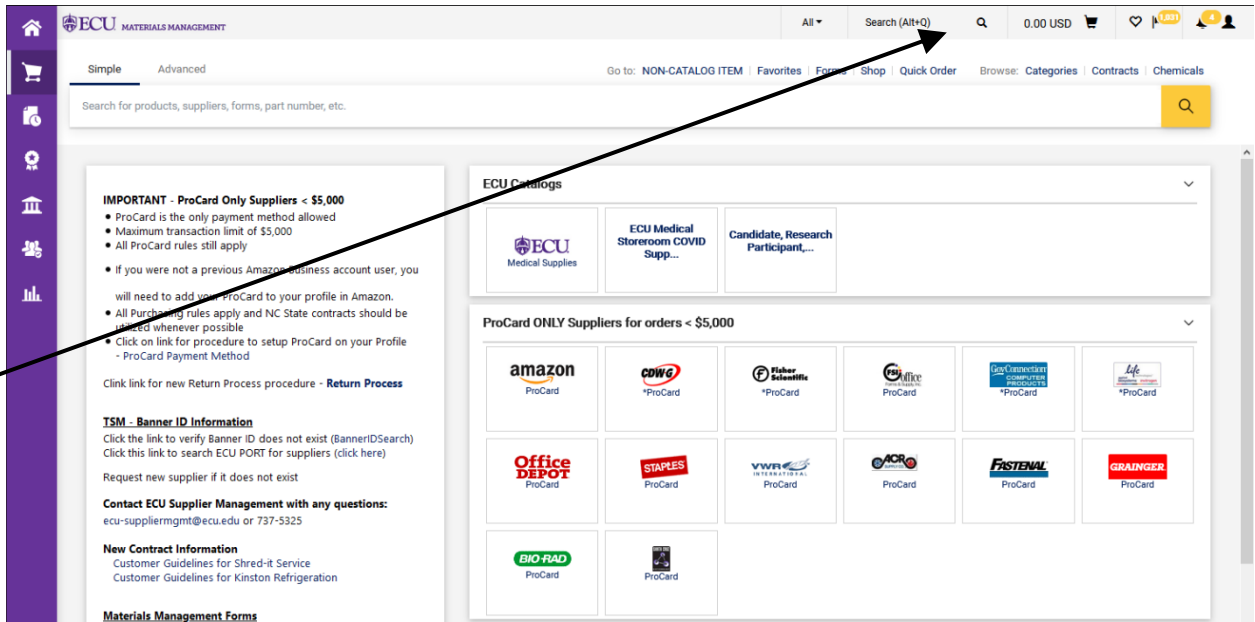
- Print
- Recent orders
- Return to your home page

ECU MATERIALS MANAGEMENT

10. You can track your ship code request with the **Requisition number** that is provided.
11. This completes the steps for this procedure. Click on the **ECU** icon to return to the home page.

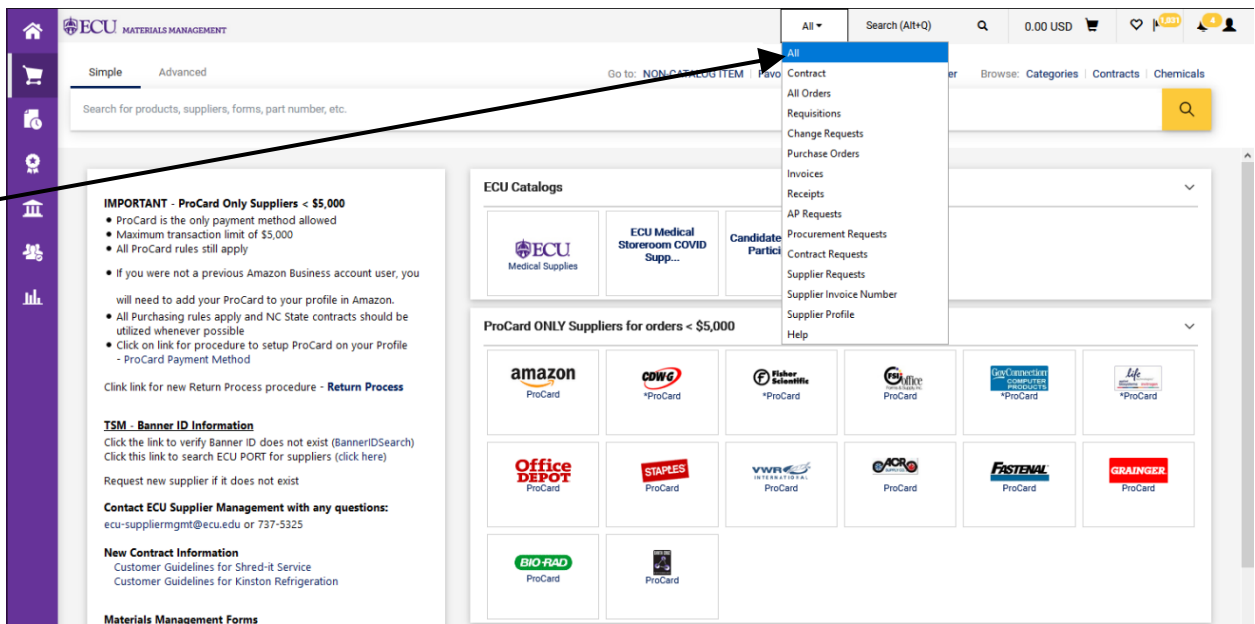
SEARCH BY DOCUMENT NUMBER

Last Updated on: 5/24/2021



1.

1. Perform a **Quick Search** for any document type by using the search bar.



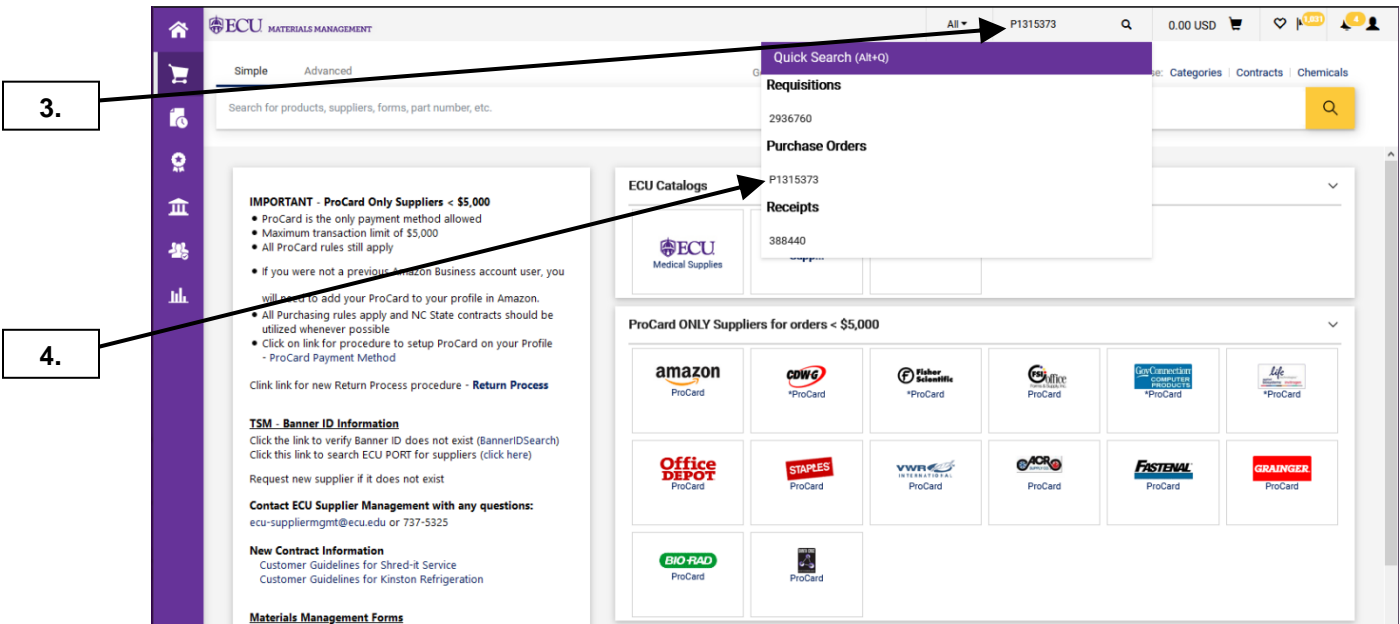
2.

2. Select **All** from the drop-down menu to retrieve any document related to the number typed into the **Search Bar**.

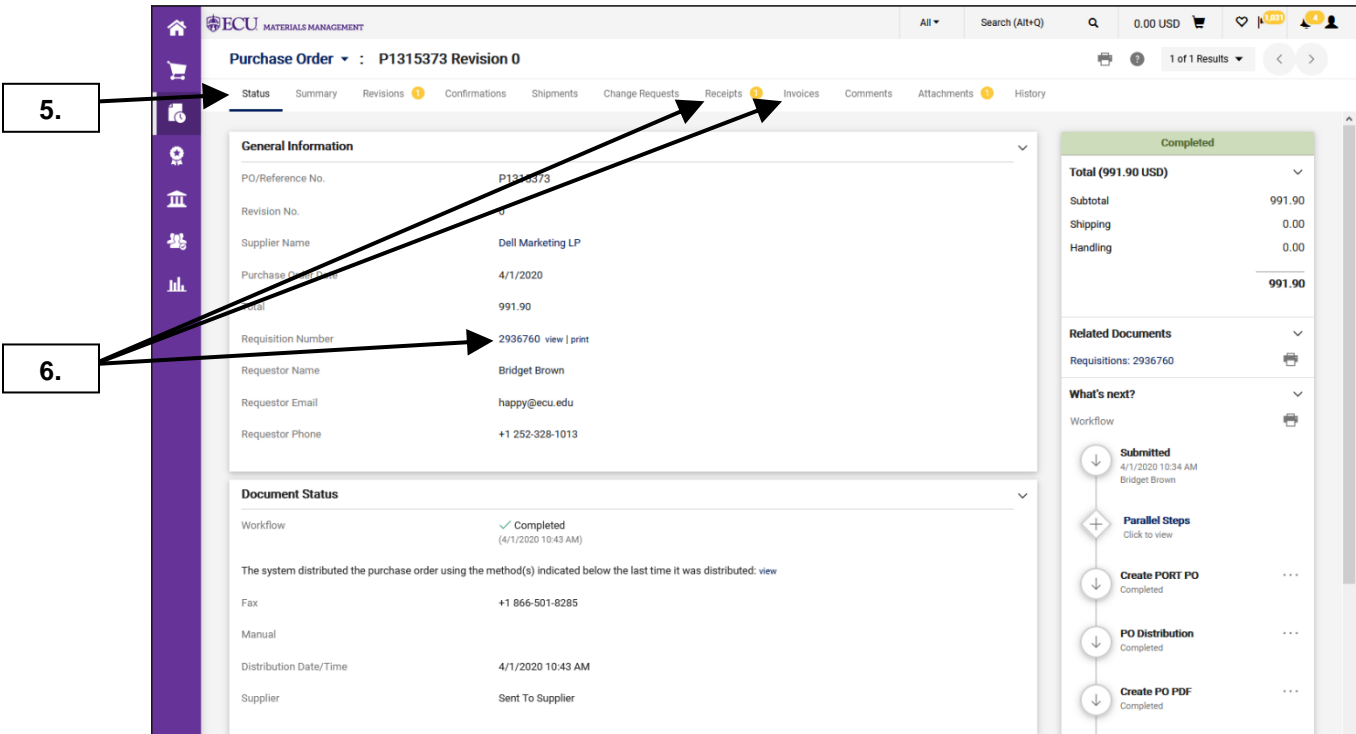
Note: Select a specific document type from the list if appropriate.

SEARCH BY DOCUMENT NUMBER

Last Updated on: 5/24/2021



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: 5/11/2021

The screenshot shows the ECU Materials Management interface. The top navigation bar includes 'All', 'Search (Alt+Q)', '0.00 USD', and user icons. The main header displays 'Purchase Order : P1332701 Revision 0'. Below this, there are tabs for 'Status', 'Summary', 'Revisions', 'Confirmations', 'Shipments', 'Change Requests', 'Receipts', 'Invoices', 'Comments', 'Attachments', and 'History'. The 'General Information' section lists details such as PO Reference No. (P1332701), Revision No. (0), Supplier Name (Dell Marketing LP), Purchase Order Date (5/3/2021), Total (4,579.00), Requisition Number (3262370), Requestor Name (Charles Boulineau), Requestor Email (boulineauc@ecu.edu), and Requestor Phone (+1 919-328-1924). The 'Document Status' section shows the workflow as 'Completed' (5/3/2021 4:59 PM). A summary table on the right shows 'Total (4,579.00 USD)' with Subtotal at 4,579.00, Shipping at 0.00, and Handling at 0.00. Below this are sections for 'Related Documents' and 'What's next?'.

1.

2.

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.

The screenshot shows the 'History' tab selected. At the top, there are filter fields for 'Start date', 'End date', and 'Document type' (set to 'All'). Below these are 'Filter' and 'Clear All Filters' buttons. A table displays 18 results. The table has columns: Line No., Revision No., Date/Time, User, Step(s), Action, Field Name, From, To, and Note. The results show three 'PO modified' actions and two 'original' actions. The 'original' actions include 'PO Export sent to external system' and 'PO Approvals completed'. A summary table on the right is identical to the one in the previous screenshot.

3.

3. Select **All** from the **Document type** filter field then click **Filter** to see all history for documents relating to this purchase order including the requisition and receipts.

VIEW ALL DOCUMENT HISTORY

Last Updated on: 5/11/2021

Purchase Order : P1332701 Revision 0

Filters: Start date, End date, Document type, Filter, Clear All Filters, Export CSV

Page 1 of 2, 1-20 of 37 Results, 20 Per Page

Line No	Revision No	Date/Time	User	Applies To	Step(s)	Action	Field Name	From	To
		5/12/2021 6:00 AM	System	Receipt - 442536		Receipt sent via external system		empty	empty
Line 3	1	5/11/2021 4:25 PM	Bridget Brown	Purchase Order - P1332701	PO modified	Match status changed	No Matches	Do not Match	
Line 2	1	5/11/2021 4:25 PM	Bridget Brown	Purchase Order - P1332701	PO modified	Match status changed	No Matches	Do not Match	
Line 1	1	5/11/2021 4:25 PM	Bridget Brown	Purchase Order - P1332701	PO modified	Match status changed	No Matches	Do not Match	
		5/11/2021 4:25 PM	Bridget Brown	Receipt - 442536		Completed			
		5/11/2021 4:25 PM	Bridget Brown	Receipt - 442536		Added		empty	P1332701
		5/3/2021 6:10 PM	System	Requisition - 3262370		Purchase requisition exported			

4. The results will now include history from all related documents. To display all results on one page, increase the **Per Page** display by choosing from the drop down.

Purchase Order : P1332701 Revision 0

Filters: Start date, End date, Document type, Filter, Clear All Filters, Export CSV

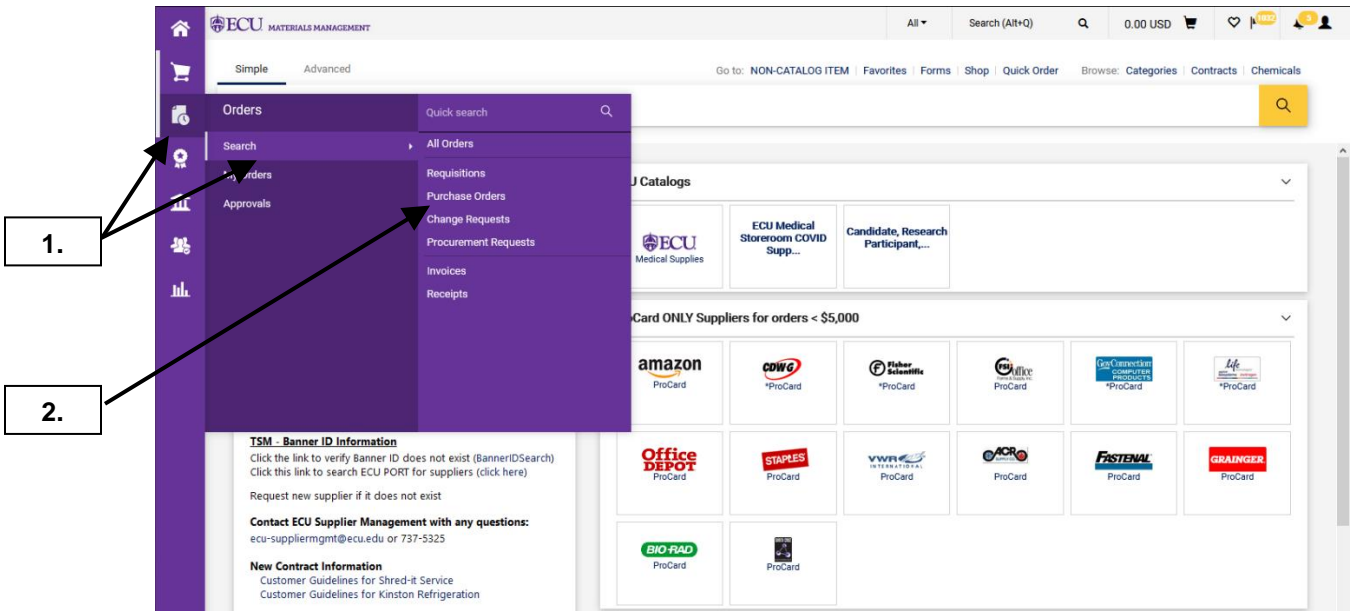
Page 1 of 2, 1-20 of 37 Results, 20 Per Page

Line No	Revision No	Date/Time	User	Applies To	Step(s)	Action	Field Name	From	To	Note
		5/12/2021 6:00 AM	System	Receipt - 442536		Receipt sent via external system		empty	empty	
Line 3	1	5/11/2021 4:25 PM	Bridget Brown	Purchase Order - P1332701	PO modified	Match status changed	No Matches	Do not Match		
Line 2	1	5/11/2021 4:25 PM	Bridget Brown	Purchase Order - P1332701	PO modified	Match status changed	No Matches	Do not Match		
Line 1	1	5/11/2021 4:25 PM	Bridget Brown	Purchase Order - P1332701	PO modified	Match status changed	No Matches	Do not Match		
		5/11/2021 4:25 PM	Bridget Brown	Receipt - 442536		Completed				
		5/11/2021 4:25 PM	Bridget Brown	Receipt - 442536		Added		empty	P1332701	
		5/3/2021 6:10 PM	System	Requisition		Purchase				

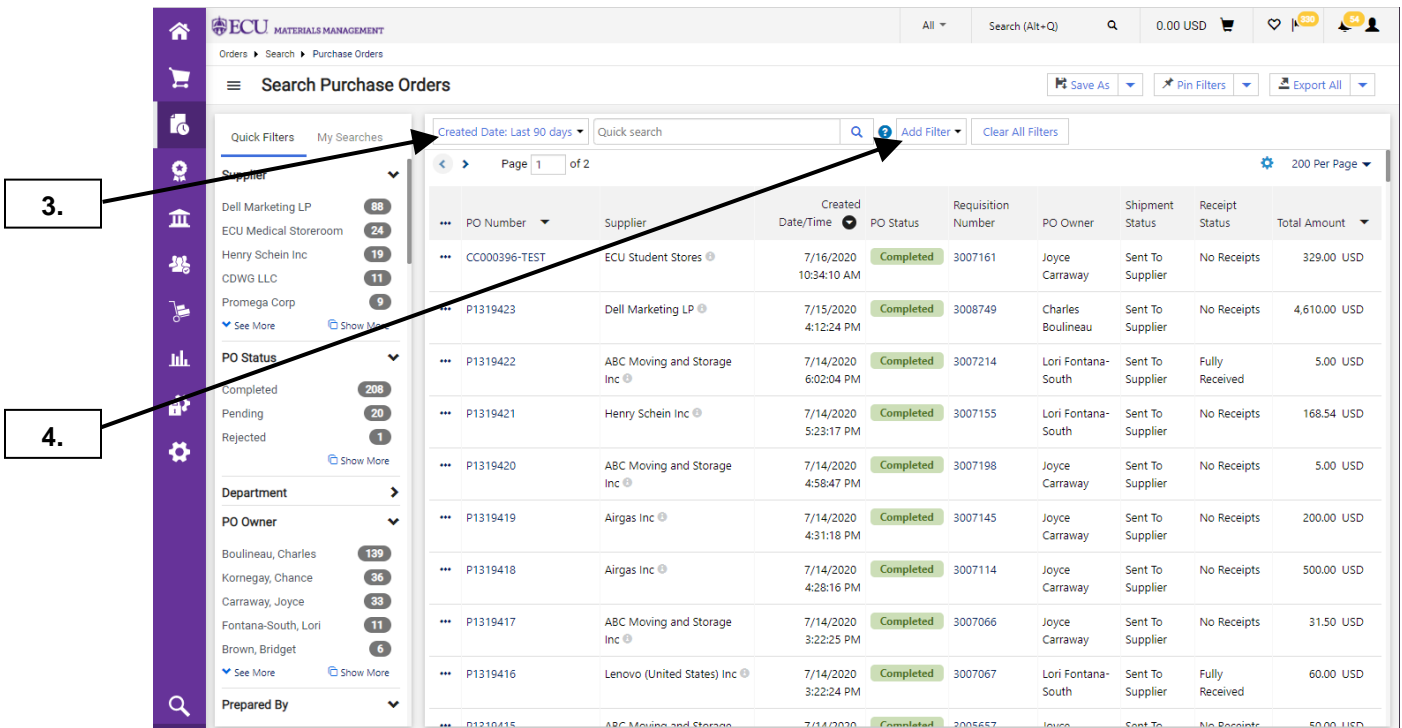
5. Continue to refine your document history by filtering Revision Numbers, Date Range, or Document type.
6. Scroll to view all displayed history.

DOCUMENT SEARCH RESULTS

Last Updated on: 5/25/2021



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: 5/25/2021

ECU MATERIALS MANAGEMENT | All | Search (Alt+Q) | 0.00 USD | 899 | 94

Orders > Search > Purchase Orders

Search Purchase Orders | Save As | Pin Filters | Export All

Quick Filters | My Searches | Created Date: Last 90 days | Quick search | Add Filter | Clear All Filters

Page 1 of 2 | 1-200 of 229 Results | 200 Per Page

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.

ECU MATERIALS MANAGEMENT | All | Search (Alt+Q) | 0.00 USD | 899 | 94

Orders > Search > Purchase Orders

Search Purchase Orders | Save As | Pin Filters | Export All

Quick Filters | My Searches | 200 Per Page

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... | Pin Columns as my defaults

Account *

Accounting Date

Accruals *

Activity *

AP Status

Approval Actions

Approval Steps

Assigned Buyer *

Backup Required *

Buyer Contact Info *

Change Request No.

PO Number ↑ ↓

Supplier ↑ ↓

Created Date/Time ↑ ↓

PO Status ↑ ↓

Requisition Number ↑ ↓

PO Owner ↑ ↓

Shipment Status ↑ ↓

Total Amount ↑ ↓

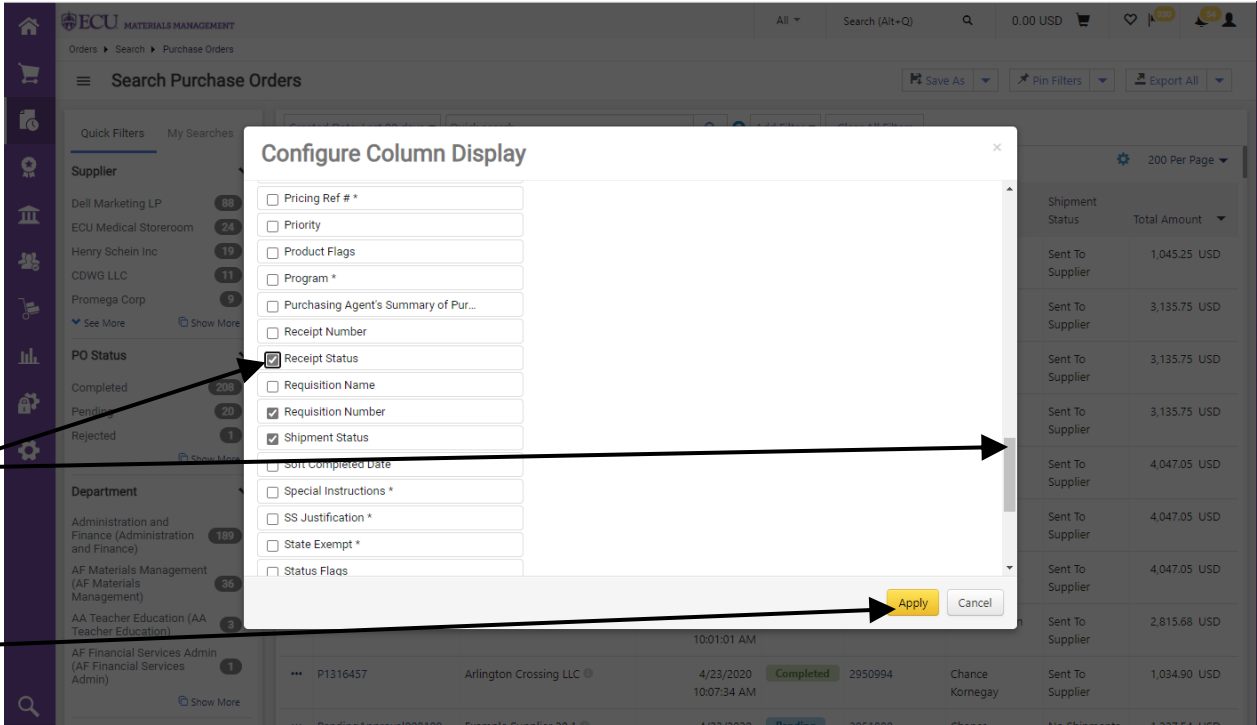
Apply Cancel

6. Check the check box in any value to be displayed in the search results pane.

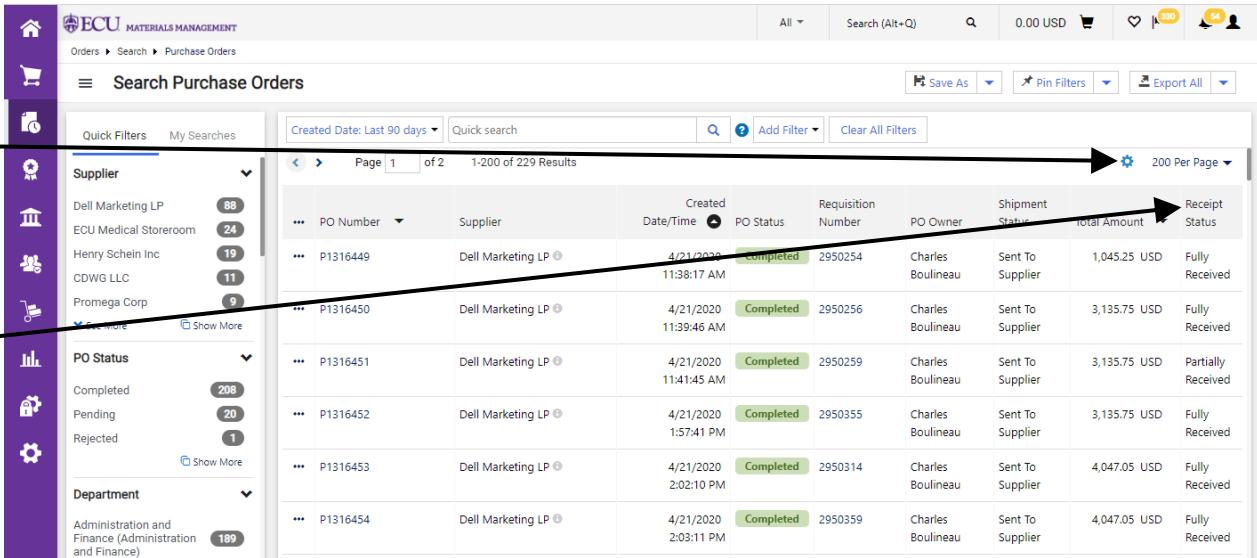
7. The list on the right are the currently displayed values in the search results pane. The order of their position to be displayed can be modified by clicking the up and down arrows to change position of dragging the value to the position desired.

DOCUMENT SEARCH RESULTS

Last Updated on: 5/25/2021



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

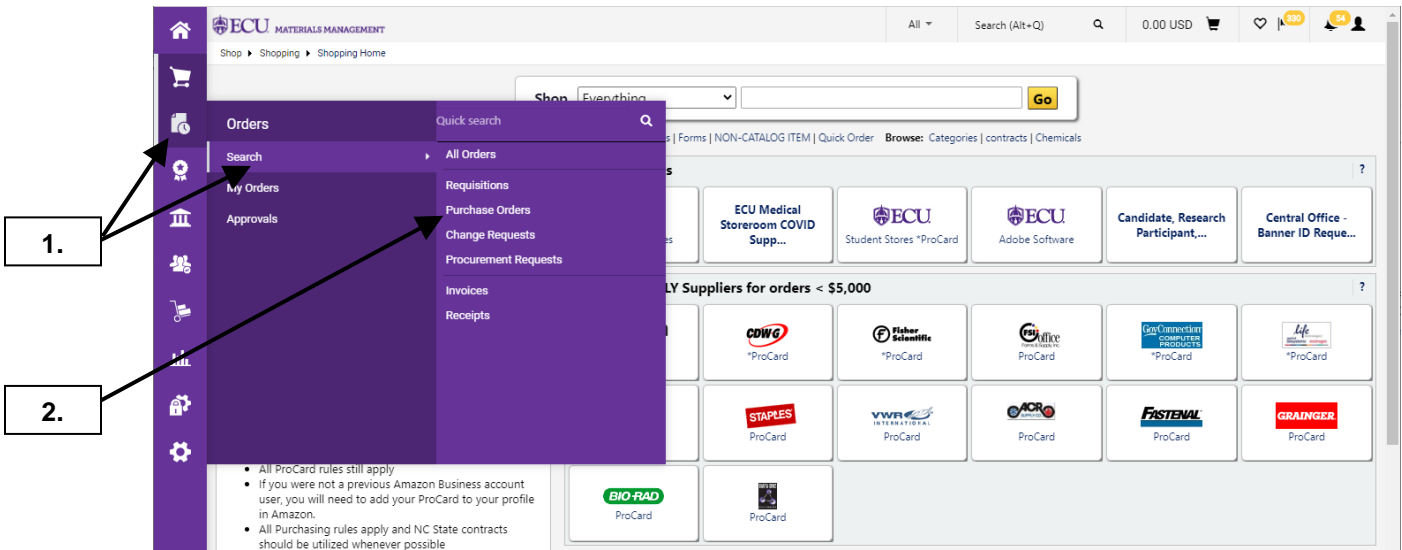
Last Updated on: 5/25/2021

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.

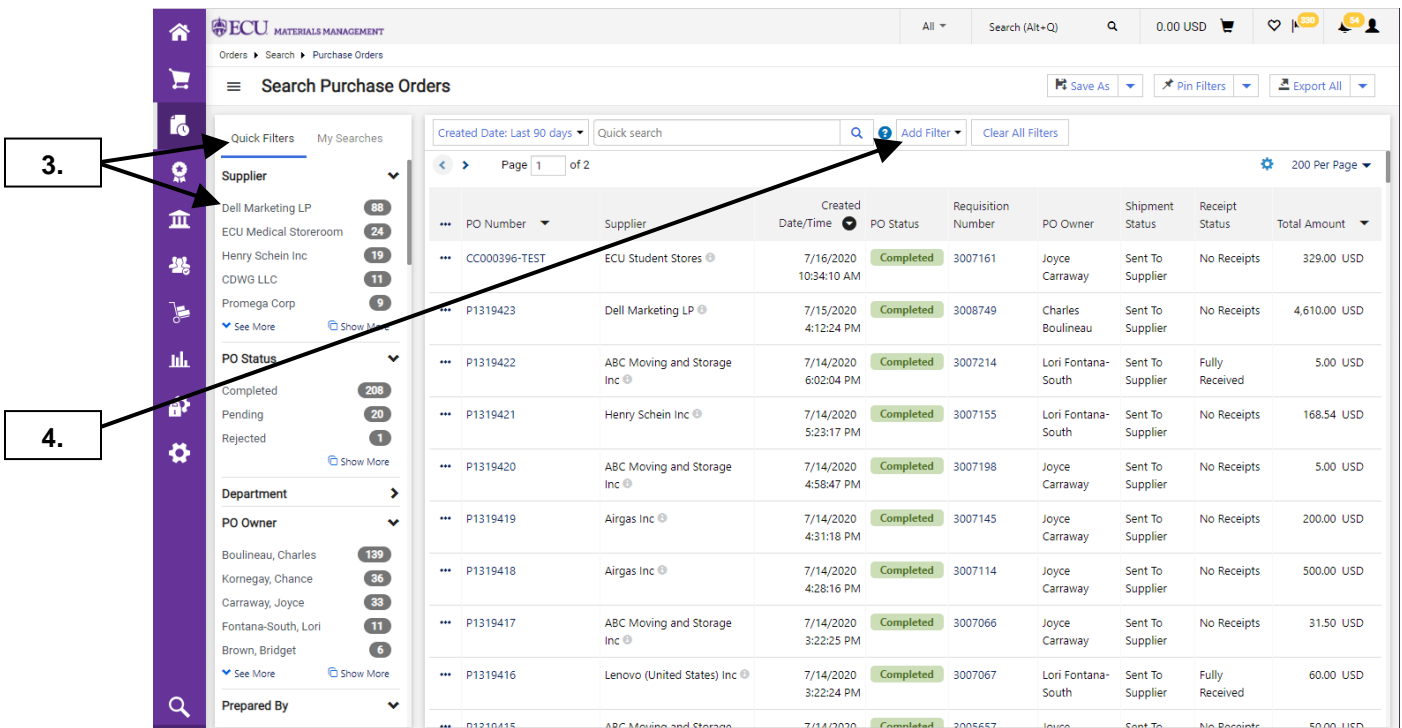
13. Click **Apply**.

DOCUMENT SEARCH - USE QUICK FILTERS

Last Updated on: 5/27/2021



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: 5/27/2021

5. The action of selecting a supplier in the Quick Filter list has added the Supplier Filter to your search.

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

Last Updated on: 5/27/2021

ECU MATERIALS MANAGEMENT

Orders > Search > Purchase Orders

Search Purchase Orders

Created Date: Last 90 days | Quick search | Add Filter | Clear All Filters

Supplier: Dell Marketing ... | Organization: All

1-88 of 88 Results

PO Number	Supplier	Organization	Created Date	Status	Position Number	PO Owner	Shipment Status	Total Amount
... P1319423	Dell Marketing LP	230601 - AF Purchasing	7/13/2020 10:18:37 AM	Completed	3005454	Charles Boulineau	Sent To Supplier	4,610.00 USD
... P1319409	Dell Marketing LP	230603 - AF Medical Stores	7/13/2020 10:13:06 AM	Completed	3005442	Chance Kornegay	Sent To Supplier	4,740.93 USD
... P1319407	Dell Marketing LP	230603 - AF Medical Stores	7/13/2020 10:13:06 AM	Completed	3005442	Chance Kornegay	Sent To Supplier	11,200.00 USD
... P1319406	Dell Marketing LP	230603 - AF Medical Stores	7/13/2020 10:13:06 AM	Completed	3005415	Chance Kornegay	Sent To Supplier	40,000.00 USD
... P1319404	Dell Marketing LP	230603 - AF Medical Stores	7/13/2020 10:09:54 AM	Completed	3005414	Chance Kornegay	Sent To Supplier	5,200.00 USD
... P1319402	Dell Marketing LP	230603 - AF Medical Stores	7/13/2020 9:56:11 AM	Completed	3005406	Chance Kornegay	Sent To Supplier	1,489.00 USD
... P1319401	Dell Marketing LP	230603 - AF Medical Stores	7/13/2020 9:47:19 AM	Completed	3005402	Chance Kornegay	Sent To Supplier	850.00 USD
... P1319386	Dell Marketing LP	230603 - AF Medical Stores	7/10/2020 11:28:59 AM	Completed	2957730	Joyce Carraway	Sent To Supplier	1,700.00 USD
... P1319382	Dell Marketing LP	230603 - AF Medical Stores	7/9/2020 4:33:55 PM	Completed	3001630	Charles Boulineau	Sent To Supplier	1,489.00 USD
... P1319381	Dell Marketing LP	230603 - AF Medical Stores	7/9/2020 3:57:33 PM	Completed	3001600	Charles Boulineau	Sent To Supplier	2,709.90 USD

8. Select a value from your profile or search from all values.

ECU MATERIALS MANAGEMENT

Orders > Search > Purchase Orders

Search Purchase Orders

Created Date: Last 90 days | Quick search | Add Filter | Clear All Filters

Supplier: Dell Marketing ... | Organization: All

1-88 of 88 Results

PO Number	Supplier	Organization	Created Date	Status	Position Number	PO Owner	Shipment Status	Total Amount
... P1319423	Dell Marketing LP	230601 - AF Purchasing	7/13/2020 10:18:37 AM	Completed	3005454	Charles Boulineau	Sent To Supplier	4,610.00 USD
... P1319409	Dell Marketing LP	230603 - AF Medical Stores	7/13/2020 10:13:06 AM	Completed	3005442	Chance Kornegay	Sent To Supplier	4,740.93 USD
... P1319407	Dell Marketing LP	230603 - AF Medical Stores	7/13/2020 10:13:06 AM	Completed	3005442	Chance Kornegay	Sent To Supplier	11,200.00 USD
... P1319406	Dell Marketing LP	230603 - AF Medical Stores	7/13/2020 10:13:06 AM	Completed	3005415	Chance Kornegay	Sent To Supplier	40,000.00 USD
... P1319404	Dell Marketing LP	230603 - AF Medical Stores	7/13/2020 10:09:54 AM	Completed	3005414	Chance Kornegay	Sent To Supplier	5,200.00 USD
... P1319402	Dell Marketing LP	230603 - AF Medical Stores	7/13/2020 9:56:11 AM	Completed	3005406	Chance Kornegay	Sent To Supplier	1,489.00 USD
... P1319401	Dell Marketing LP	230603 - AF Medical Stores	7/13/2020 9:47:19 AM	Completed	3005402	Chance Kornegay	Sent To Supplier	850.00 USD

9. Click Apply to define the Filter parameter.

DOCUMENT SEARCH - USE QUICK FILTERS

Last Updated on: 5/27/2021

10.

ECU MATERIALS MANAGEMENT

Orders > Search > Purchase Orders

Search Purchase Orders

Quick Filters My Searches

Created Date: Last 90 days Quick search Add Filter Clear All Filters

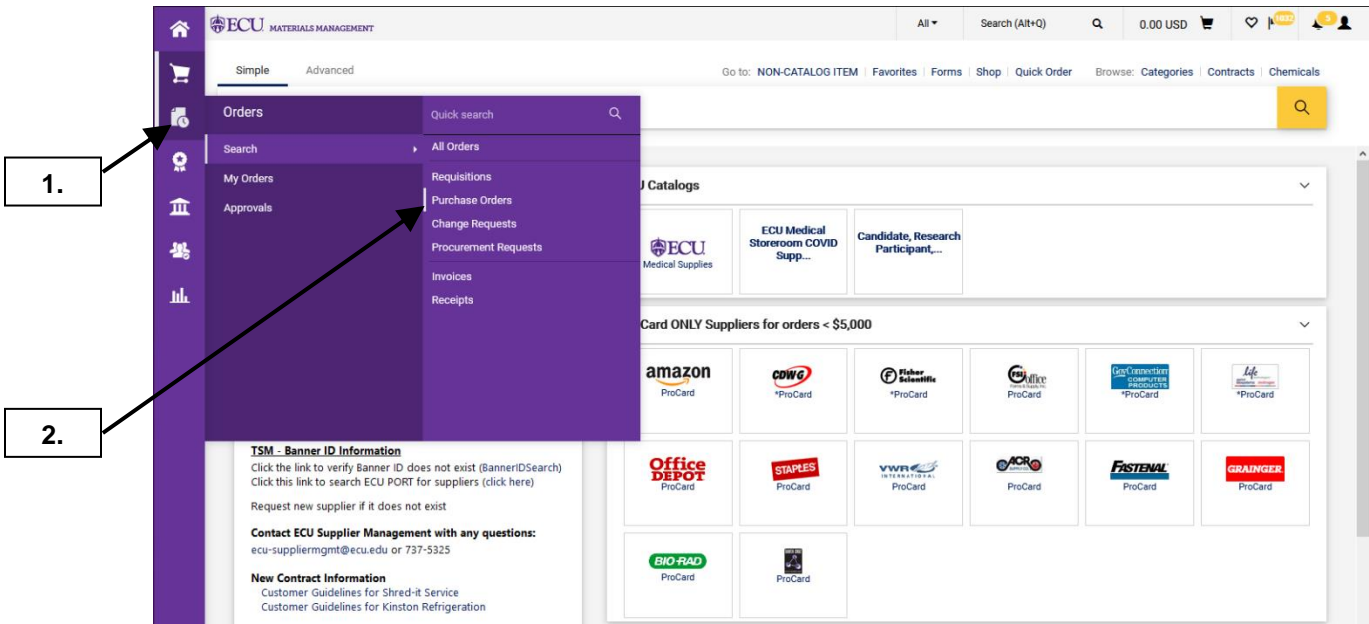
Supplier: Dell Marketing Organization*: Is Equal To:230...

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 they become your default filters each time you return to the search.

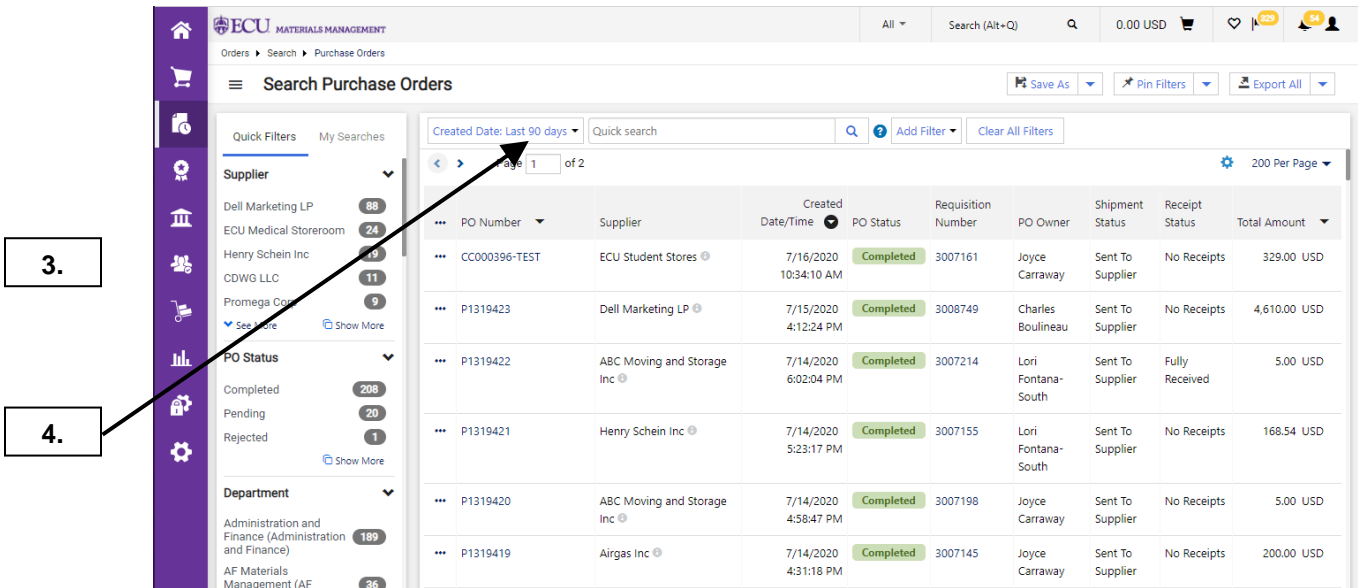
ENHANCED DOCUMENT SEARCH OPTIONS

Last Updated on: 5/25/2021



1. Hover on the **Orders** icon.
2. Hover on **Search** then select the **Purchase Orders** link.

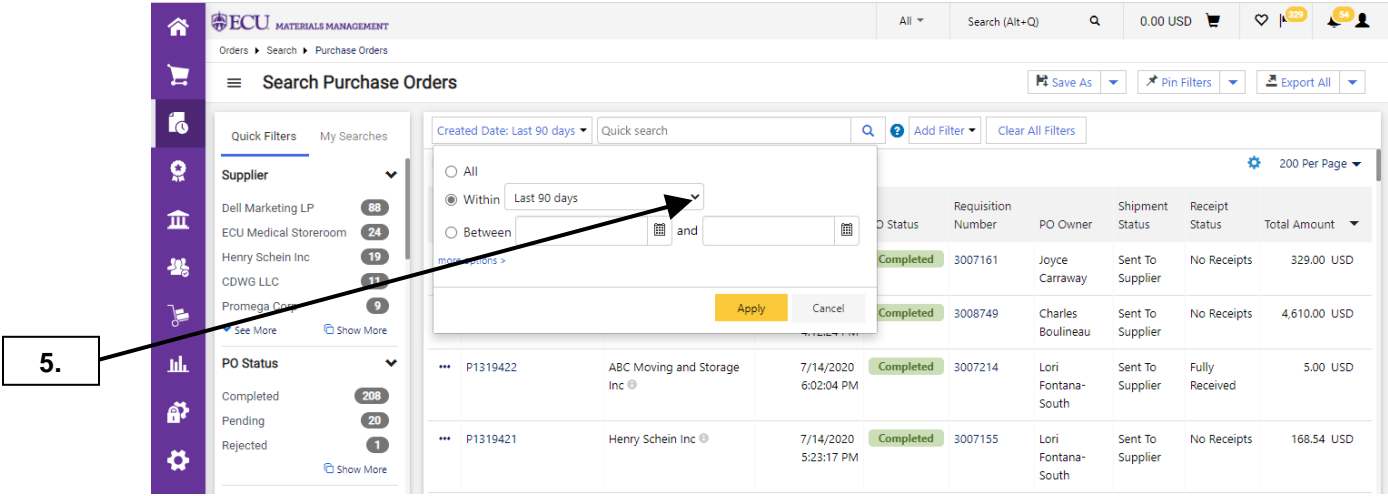
Note: Elastic search procedures can be performed for **Requisitions, Purchase Orders, E-Invoices, and Receipts.**



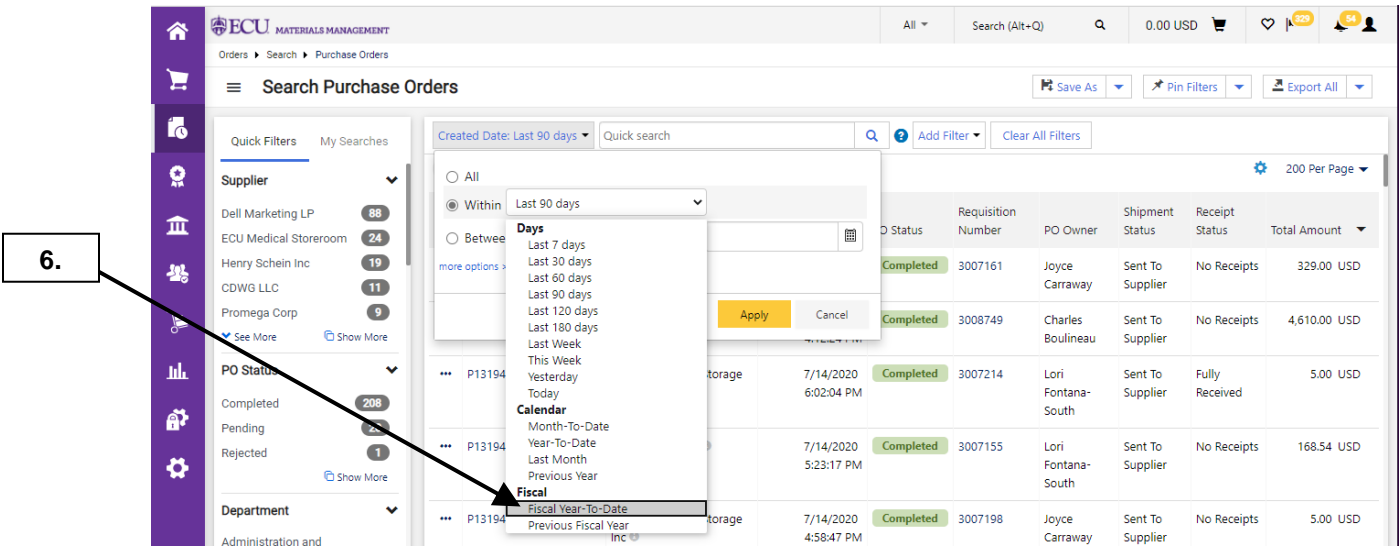
3. Notice options to search by **Date**, specific document number in **Quick Search**, and **Add Filters**. By default, all your purchase orders created in the last 90 days are displayed.
4. Click the dropdown to modify the date range.

ENHANCED DOCUMENT SEARCH OPTIONS

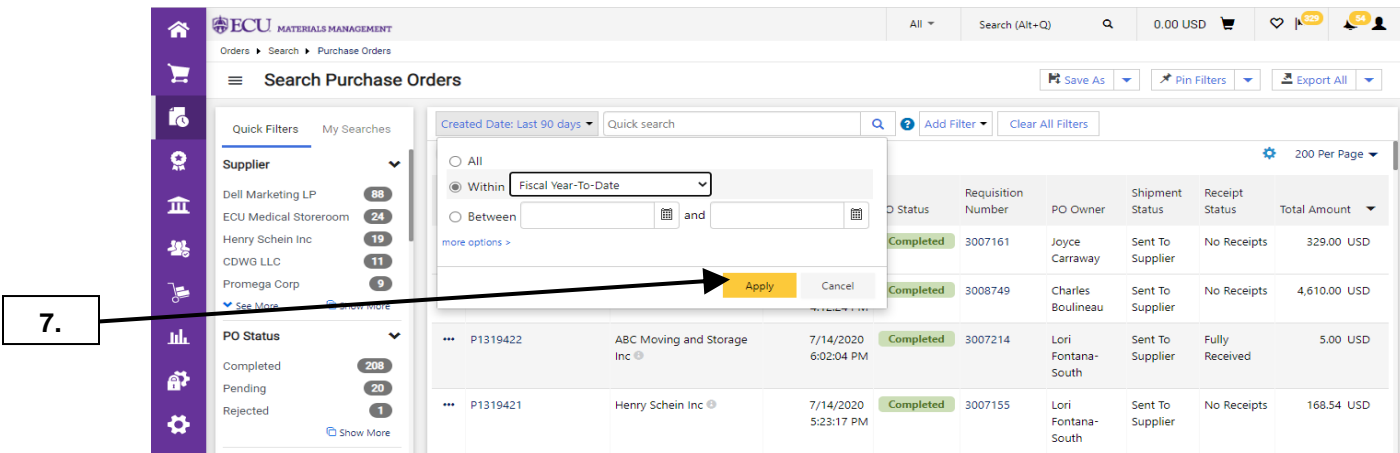
Last Updated on: 5/25/2021



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: 5/25/2021

8. Note to results. Your search has been narrowed to the date range.

9. Click on **Add Filter** to further refine your search.

PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Receipt Status	Total Amount
CC000396-TEST	ECU Student Stores	7/16/2020 10:34:10 AM	Completed	3007161	Joyce Carraway	Sent To Supplier	No Receipts	329.00 USD
P1319423	Dell Marketing LP	7/15/2020 4:12:24 PM	Completed	3008749	Charles Boulineau	Sent To Supplier	No Receipts	4,610.00 USD
P1319422	ABC Moving and Storage Inc	7/14/2020 6:02:04 PM	Completed	3007214	Lori Fontana-South	Sent To Supplier	Fully Received	5.00 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

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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The screenshot shows the 'Search Purchase Orders' page. On the left, a sidebar lists suppliers with counts. The main search area has a 'Fund*' dropdown menu set to 'All'. A text input field next to it contains '11' and an 'Add' button. Below this, an 'Apply' button is highlighted with a yellow background. The table below shows search results with columns for PO Number, Supplier, Date/Time, PO Status, Requisition Number, PO Owner, Shipment Status, Receipt Status, and Total Amount.

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.

The screenshot shows the search results after applying the 'Fund*' filter. The results are now '1-78 of 78 Results'. The 'Add Filter' button is highlighted with a yellow background. The table below shows search results with columns for PO Number, Supplier, Date/Time, PO Status, Requisition Number, PO Owner, Shipment Status, Receipt Status, and Total Amount.

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.

The screenshot shows the 'Add Filter' dropdown menu open. The 'Receipt Status' option is selected with a checkmark. The 'Add Filter' button is highlighted with a yellow background. The table below shows search results with columns for PO Number, Supplier, Date/Time, PO Status, Requisition Number, PO Owner, Shipment Status, Receipt Status, and Total Amount.

18. Scroll to find **Receipt Status**.

19. Click the **Check Box** to select this field.

ENHANCED DOCUMENT SEARCH OPTIONS

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The screenshot shows the 'Search Purchase Orders' page with the following data table:

PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Receipt Status	Total Amount
CC000396-TEST	ECU Student Stores	7/16/2020 10:34:10 AM	Completed	3007161	Joyce Carraway	Sent To Supplier	No Receipts	329.00 USD
P1319423	Dell Marketing LP	7/15/2020 4:12:24 PM	Completed	3008749	Charles Boulineau	Sent To Supplier	No Receipts	4,610.00 USD
P1319422	ABC Moving and Storage Inc	7/14/2020 6:02:04 PM	Completed	3007214	Lori Fontana-South	Sent To Supplier	Fully Received	5.00 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

- 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**.

The screenshot shows the 'Search Purchase Orders' page with the following data table:

PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Receipt Status	Total Amount
CC000396-TEST	ECU Student Stores	7/16/2020 10:34:10 AM	Completed	3007161	Joyce Carraway	Sent To Supplier	No Receipts	329.00 USD
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

- 22. Note your refined **Results** due to adding Receipt Status.
- 23. Select **Add Filter** to add **PO Number** to your search parameters.

The screenshot shows the 'Search Purchase Orders' page with the following data table:

PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Receipt Status	Total Amount
CC000396-TEST	ECU Student Stores	7/16/2020 10:34:10 AM	Completed	3007161	Joyce Carraway	Sent To Supplier	No Receipts	329.00 USD
P1319423	Dell Marketing LP	7/15/2020 4:12:24 PM	Completed	3008749	Charles Boulineau	Sent To Supplier	No Receipts	4,610.00 USD

- 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 is a sidebar with various filters. The 'PO Number' filter is expanded, showing a search input field with the letter 'P' and an 'Apply' button. A tooltip indicates that multiple values can be separated by a comma. The main table displays search results with columns for PO Number, Supplier, Date/Time, PO Status, Requisition Number, PO Owner, Shipment Status, Receipt Status, and Total Amount.

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 now set to 'P'. The results table shows 32 results. Callout 27 points to the table, and callout 28 points to the PO number 'P1319420' in the first column of the table.

27. Note the Results of your from adding the Filters.

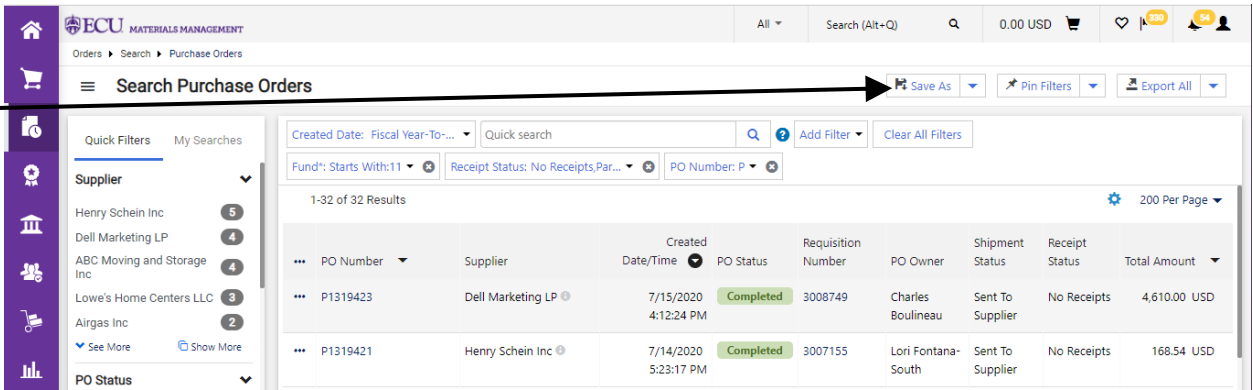
28. You can open the purchase orders by Clicking the PO number.

The screenshot shows the search results table. Callout 29 points to the 'Action' icon (a gear) in the first row of the table. A dropdown menu is open, showing options: 'Create Quantity Receipt', 'Create Invoice', and 'Create Credit Memo'.

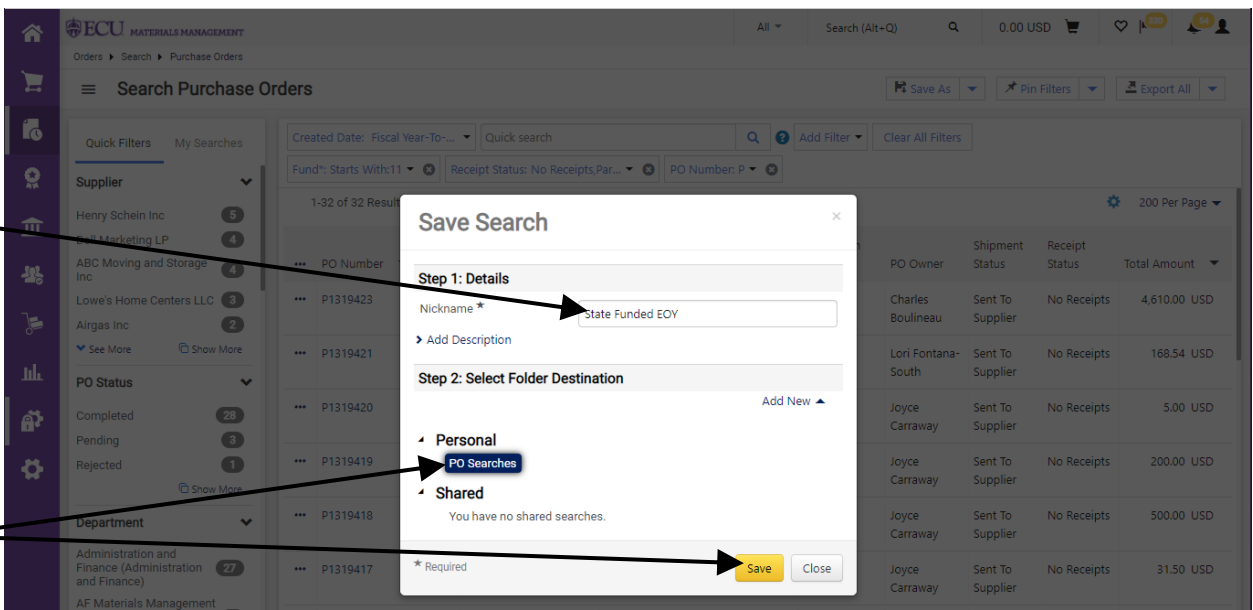
29. You can **take action** directly from the search by choosing an option from the **Action** icon.

ENHANCED DOCUMENT SEARCH OPTIONS

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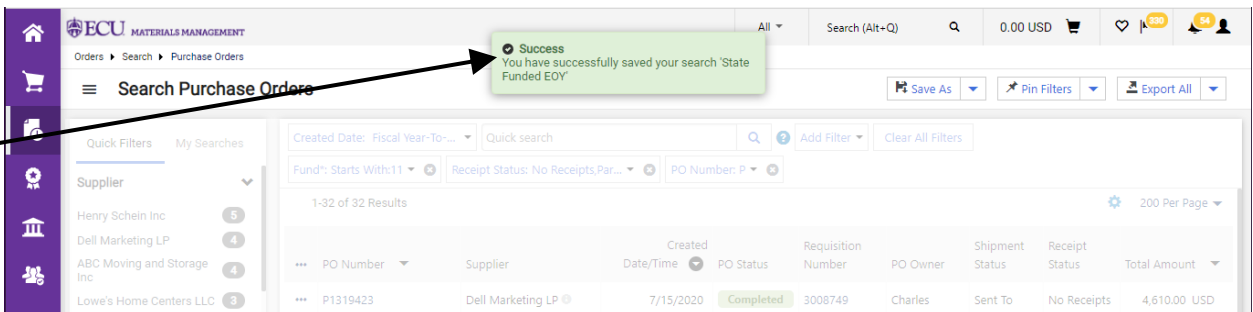
30. Click **Save As** to save the added Filters for quick access.



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

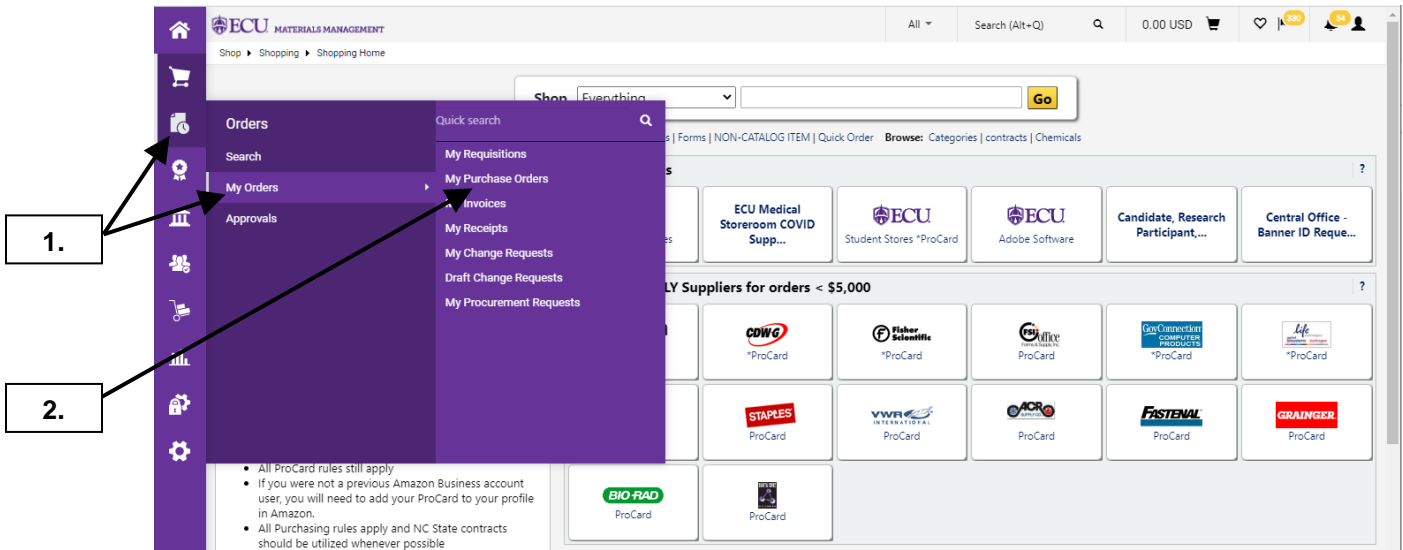
Last Updated on: 5/25/2021

- 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.

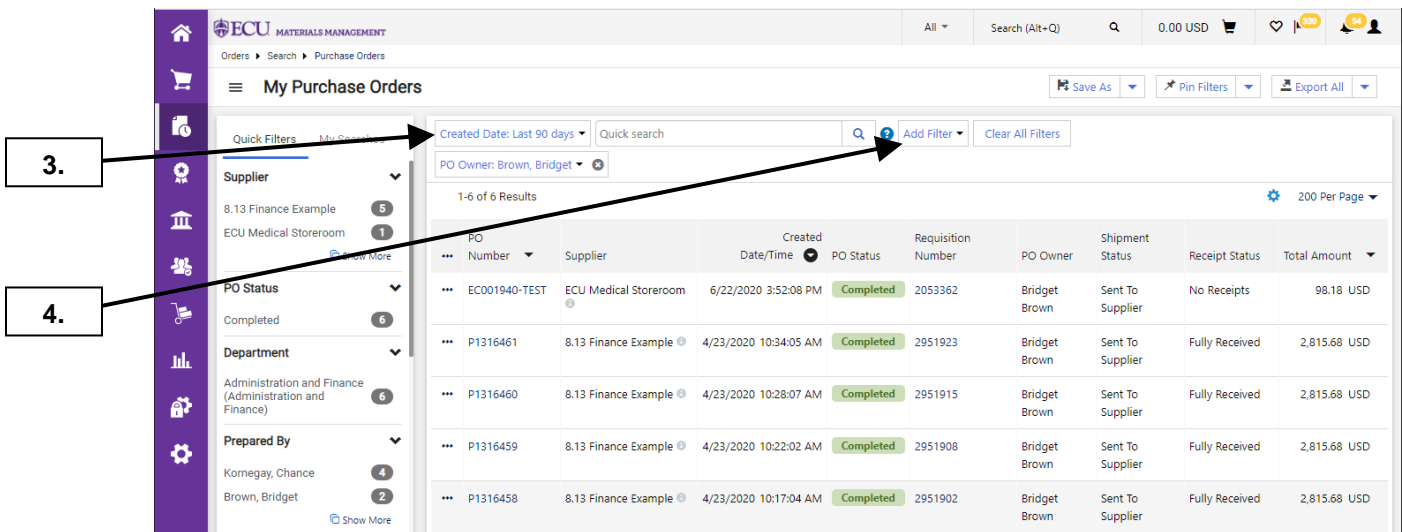
- 36. The filters saved in your Favorite Searches will not have to be selected manually and can be executed from the My Searches menu anytime.
Note: See the total Results
- 37. The completes the procedure for Enhanced Document Search.

MY PURCHASE ORDERS

Last Updated on: 5/25/2021



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

Last Updated on: 5/25/2021

ECU MATERIALS MANAGEMENT

Orders > Search > Purchase Orders

My Purchase Orders

Quick Filters My Searches

Created Date: Last 90 days Quick search Add Filter Clear All Filters

PO Owner: Brown, Bridget

1-6 of 6 Results

PO Number	Supplier	Date/Time	Created	PO Status	Request 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	

5. Begin typing **Organization** and click the **Check Box** for **Organization** to refine your search to a specific Organization number.

ECU MATERIALS MANAGEMENT

Orders > Search > Purchase Orders

My Purchase Orders

Quick Filters My Searches

Created Date: Last 90 days Quick search Add Filter Clear All Filters

PO Owner: Brown, Bridget Organization*: All

1-6 of 6 Results

Is Equal To

My Profile Values

- 230601 - AF Purchasing
- 230603 - AF Medical Stores
- All Values
- Search for Values...

PO Number	Supplier	Date/Time	Created	PO Status	Request 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	

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

Last Updated on: 5/25/2021

8.

ECU MATERIALS MANAGEMENT

Orders > Search > Purchase Orders

My Purchase Orders (Modified)

Quick Filters: My Searches

Supplier: 8.13 Finance Example (4), ECU Medical Storeroom (1)

PO Status: Completed (5)

Department: Administration and Finance (Administration and Finance) (5)

Prepared By: Kornegay, Chance (4), Brown, Bridget (1)

Created Date: Last 90 days

Quick search

PO Owner: Brown, Bridget

Organization*: Is Equal To:230...

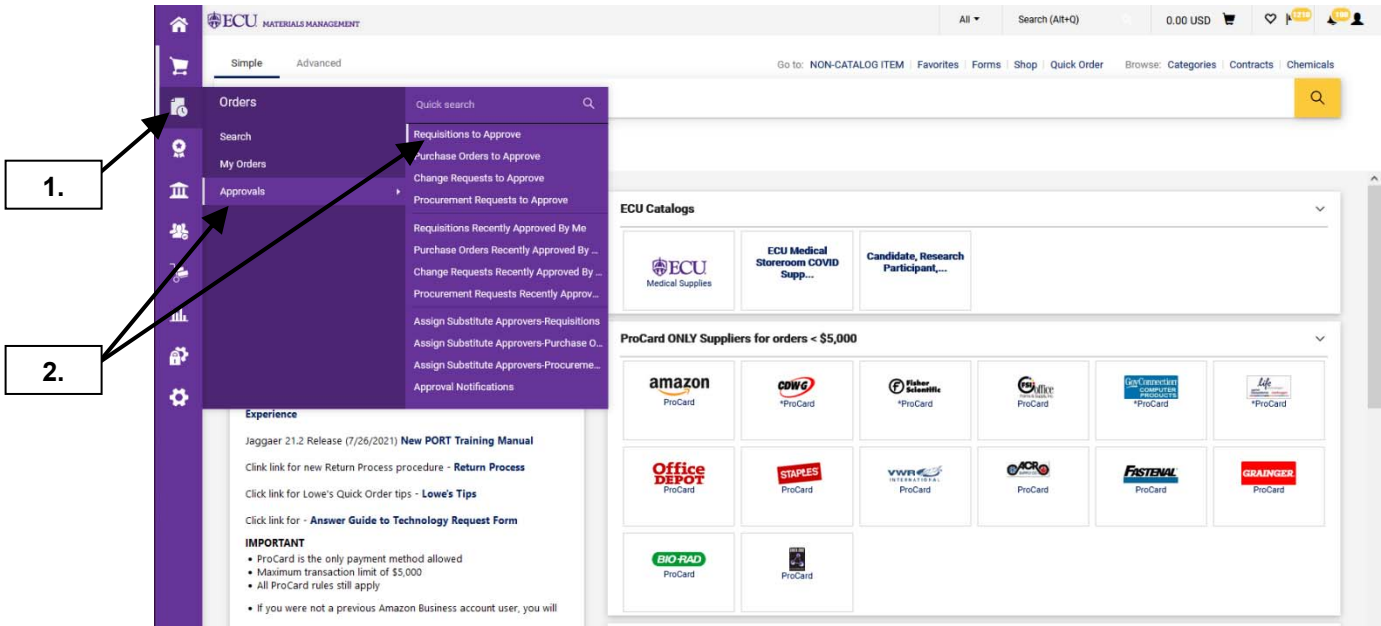
1-5 of 5 Results

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

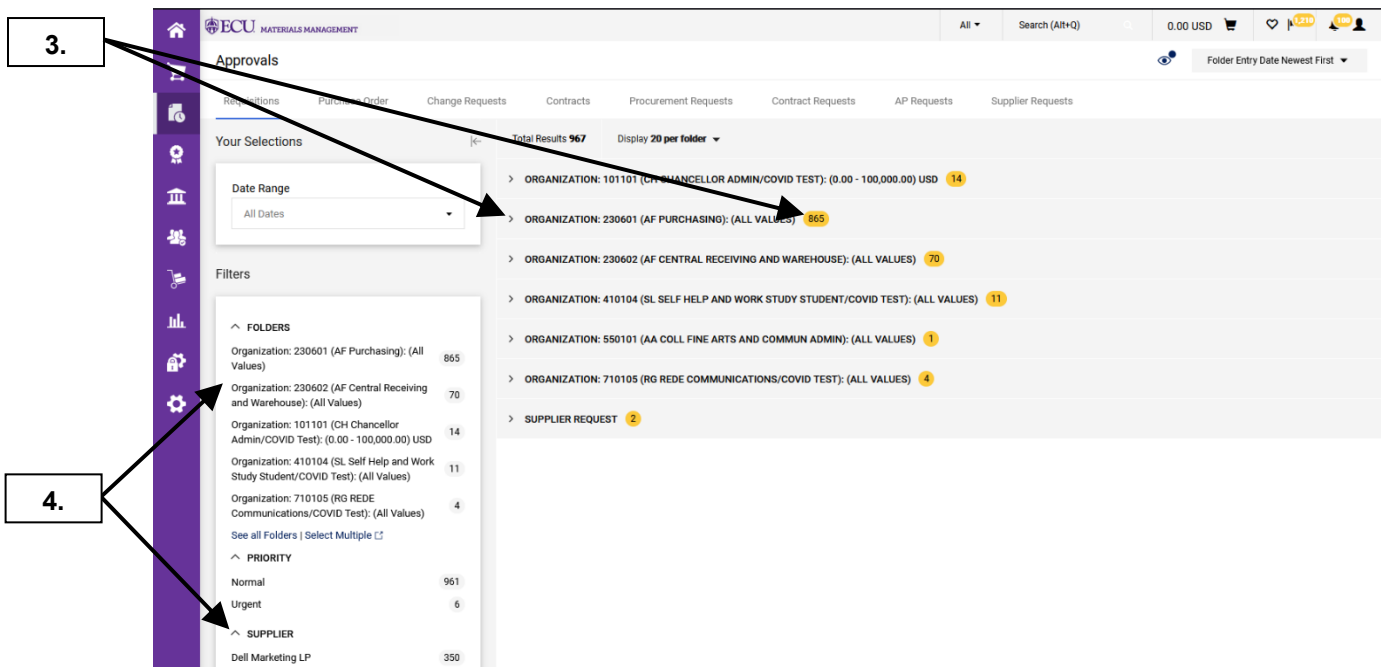
8. Note the results and repeat **Step 4** to add additional search parameters. This completes the steps for the procedure.

APPROVALS

Last Updated on: 11/12/2021



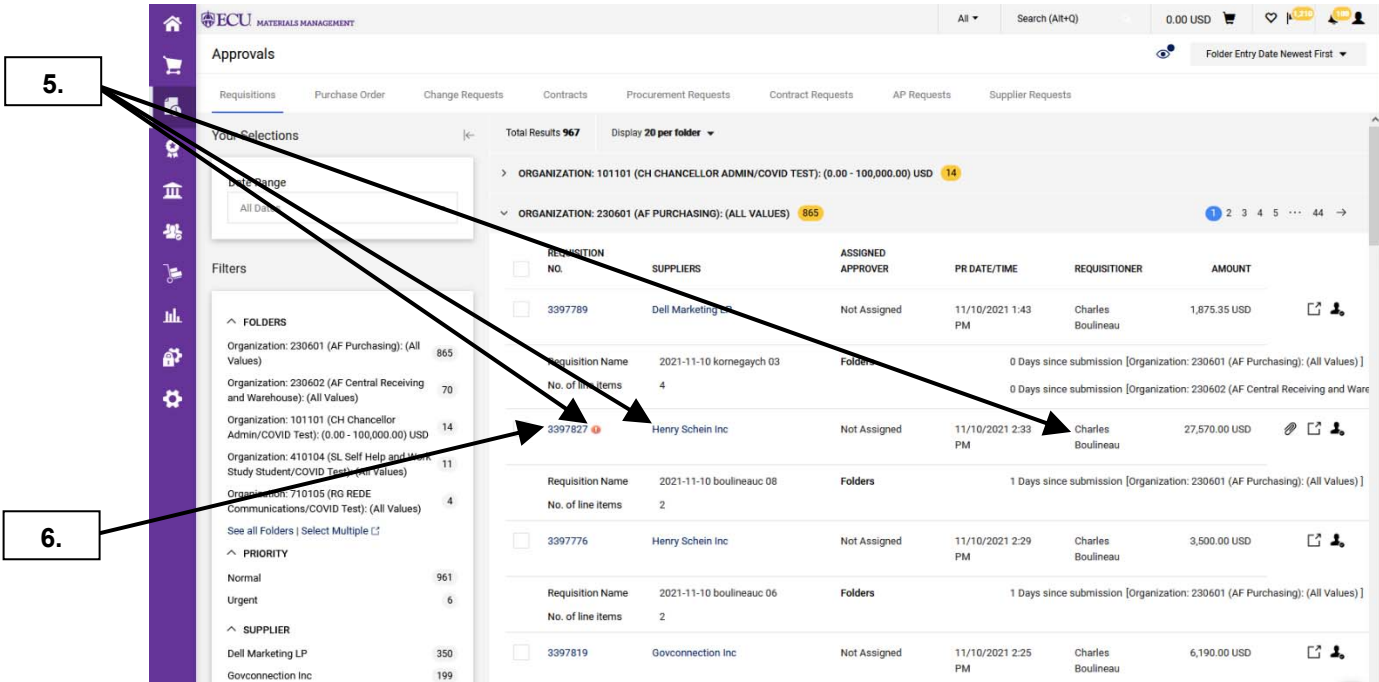
1. Hover on the **Orders** icon.
2. Hover on **Approvals** then select the appropriate approval document link. For demonstration, the **Requisitions to Approve** link will be selected.



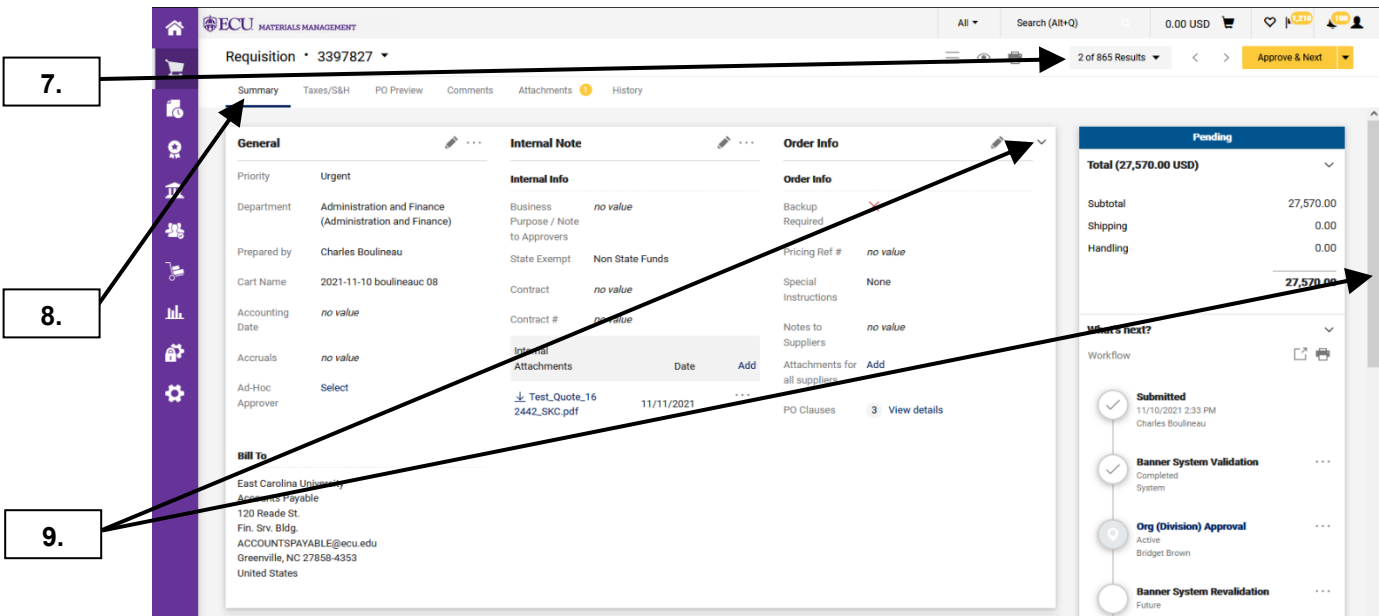
3. Approval folders with documents pending approval will display according to departmental assignments. **Expand** on the desired approval folder.
4. Filters are available for refining your searches in your approval queues: **Date Range, Priority, Supplier, Prepared by, Form Type, Custom Fields, Current Workflow Step, State, Department, Assigned Approver, Prepared For, and Status Flags**. This will require scrolling to see remaining filters.

APPROVALS

Last Updated on: 11/12/2021



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.** Notice the paper clip icon indicates attached documentation and the red exclamation icon to indicates **Urgent** priority.
Note: If you do not need to review the requisition before assigning it to yourself, skip to **step 11.**
6. Click on the requisition number to be reviewed.
Note: Before assigning a requisition for approval, it is recommended that you review the document to ensure that you have time to complete the approval.



7. Navigation of the Organization Approval folder is available for requisitions pending approval from the Results dropdown.
8. **The Summary Tab** displays the document header information.
9. Scroll down or collapse the **General** section to view **FOAPAL / Ship Codes** and **Line Item Details** of requisition.

APPROVALS

Last Updated on: 11/12/2021

10.

Chart	Fund	Organization	Account	Program	Activity	Location
E East Carolina University	111151 AA Libraries	230601 AF Purchasing	72110 Office Supply	0000 Default Program Code	no value	no value

10. Review the **FOAPAL / Ship Codes** section then collapse it or scroll down to view all line item details.

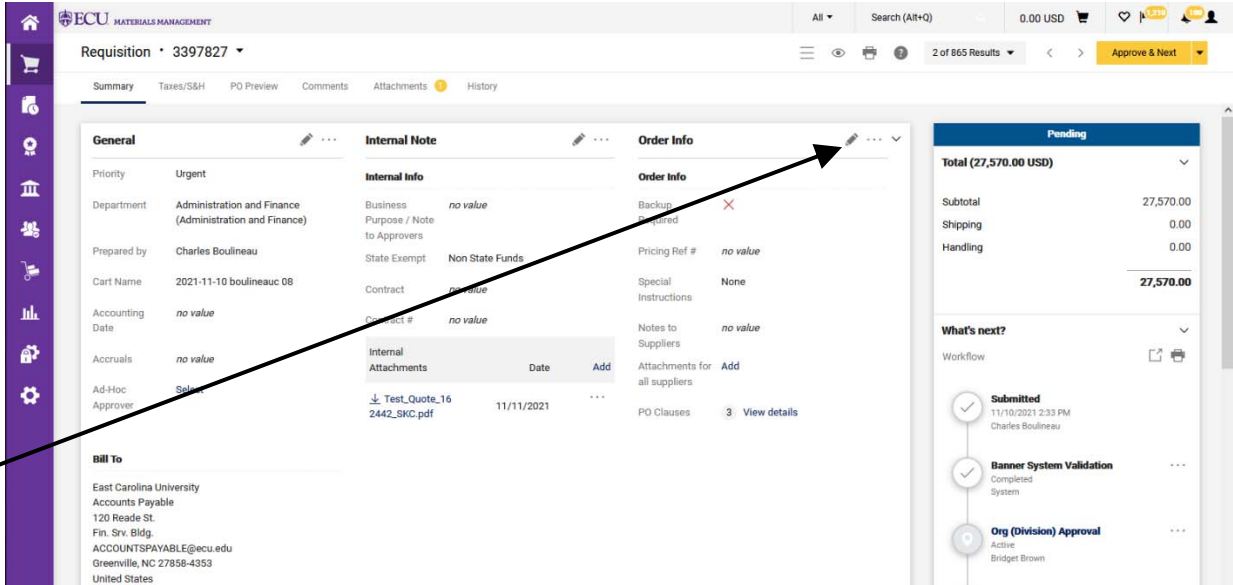
11.

Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	Scalpel Surgical #12 Plastic Safety Sterile Disposable 1000/Bx	9537177	EA	4,500.00	Qty: 6 EA	27,000.00
2	Waterpik® Prophy Paste Fine Bubblegum 200/Bx	34545	EA	285.00	Qty: 2 EA	570.00

11. Once review of the document summary details is complete, click on the **Assign To Myself** for any necessary edits.

APPROVALS

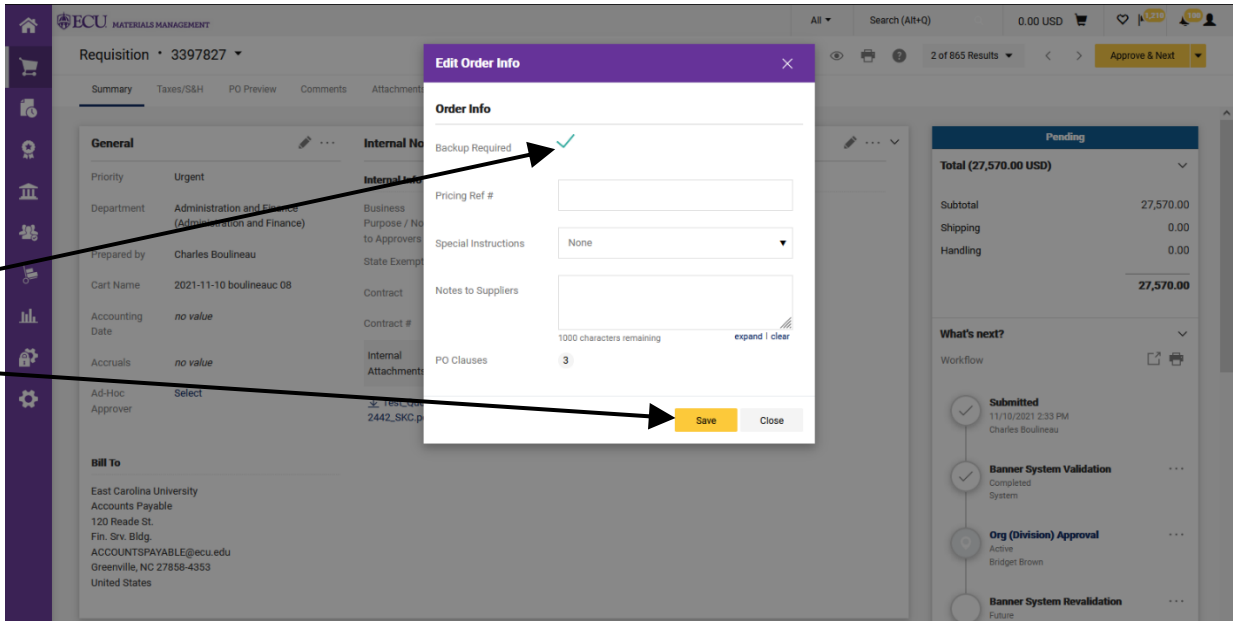
Last Updated on: 11/12/2021



12.

12. The requisition is now assigned to you and edits can be made. Click on **edit** icon under the **Order Info** section

Note: Other approvers for this Organization folder cannot approve or modify the requisition while you have it assigned to yourself.



13.

14.

13. In this example, we will select **Backup Required** check box.

14. Click **Save** button to keep changes.

APPROVALS

Last Updated on: 11/12/2021

15. Notice the change was updated.

16. To open an attachment, click on the document name link.

17. Scroll down or collapse the header section of the requisition for FOAPAL / Ship Code edits.

- 15. Notice the change was updated.
- 16. To open an attachment, click on the document name link.
- 17. Scroll down or collapse the header section of the requisition for FOAPAL / Ship Code edits.

18. If necessary, click **FOAPAL / Ship Codes** edit icon, which will allow changes to FOAPAL string for every line item. See Review Cart Header procedure, steps 17 – 29. For Ship To edits, see Review Cart Header procedure, steps 31 – 43.

19. Continue to scroll down to make changes at line item level.

- 18. If necessary, click **FOAPAL / Ship Codes** edit icon, which will allow changes to FOAPAL string for every line item. See Review Cart Header procedure, steps 17 – 29. For Ship To edits, see Review Cart Header procedure, steps 31 – 43.
- 19. Continue to scroll down to make changes at line item level.

APPROVALS

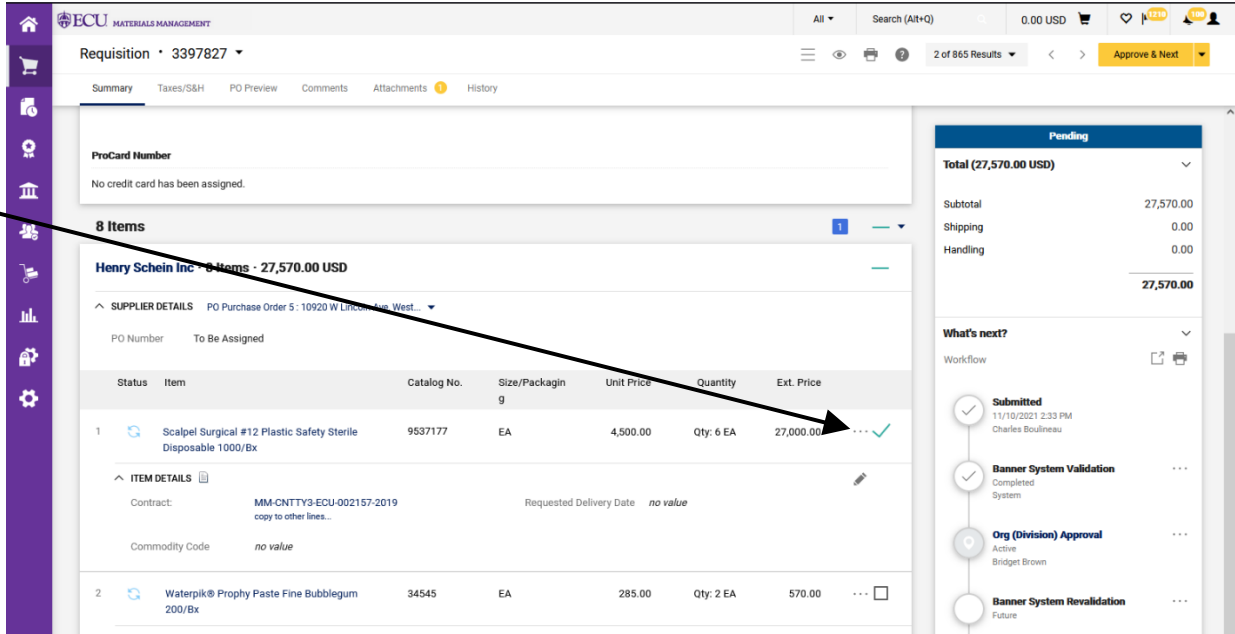
Last Updated on: 11/12/2021

20. Check the **Items Action** box to select actions for all items.
Note: To take action for a particular item see step 23.

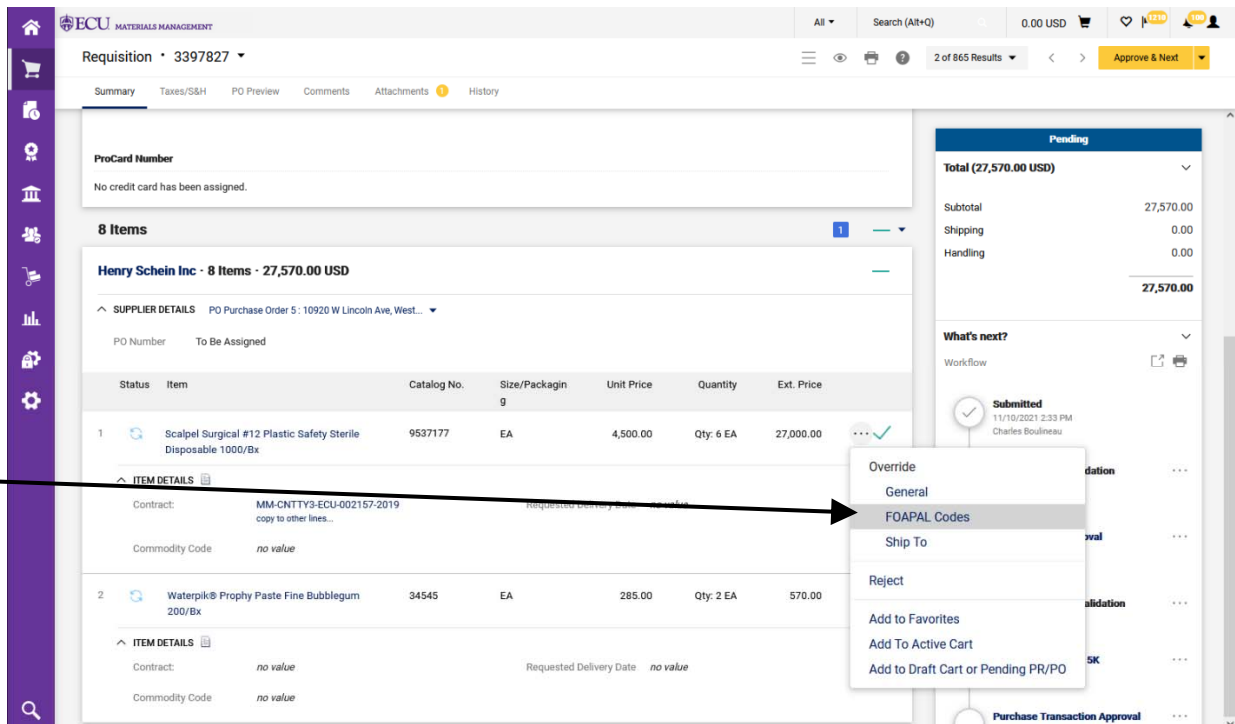
21. From the **Item Actions** drop down choose an appropriate action.
Note: Rejected items will require a reason for rejection comment.

APPROVALS

Last Updated on: 11/12/2021



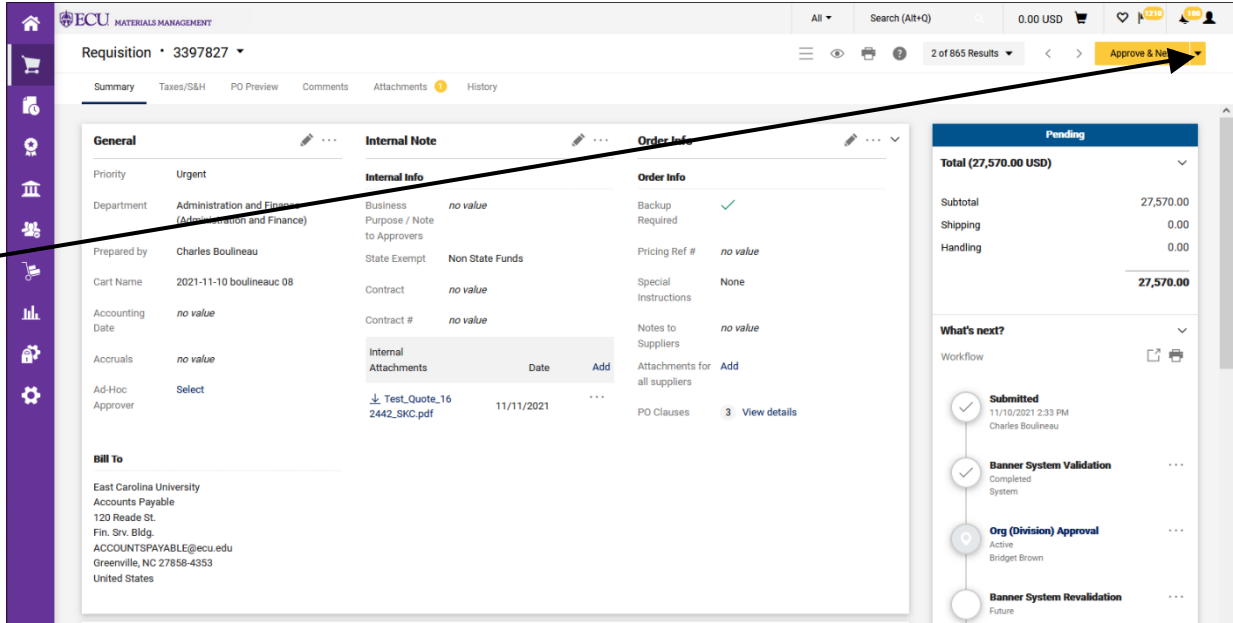
22. Click the ellipses corresponding with a line item to view actions available for each line item.



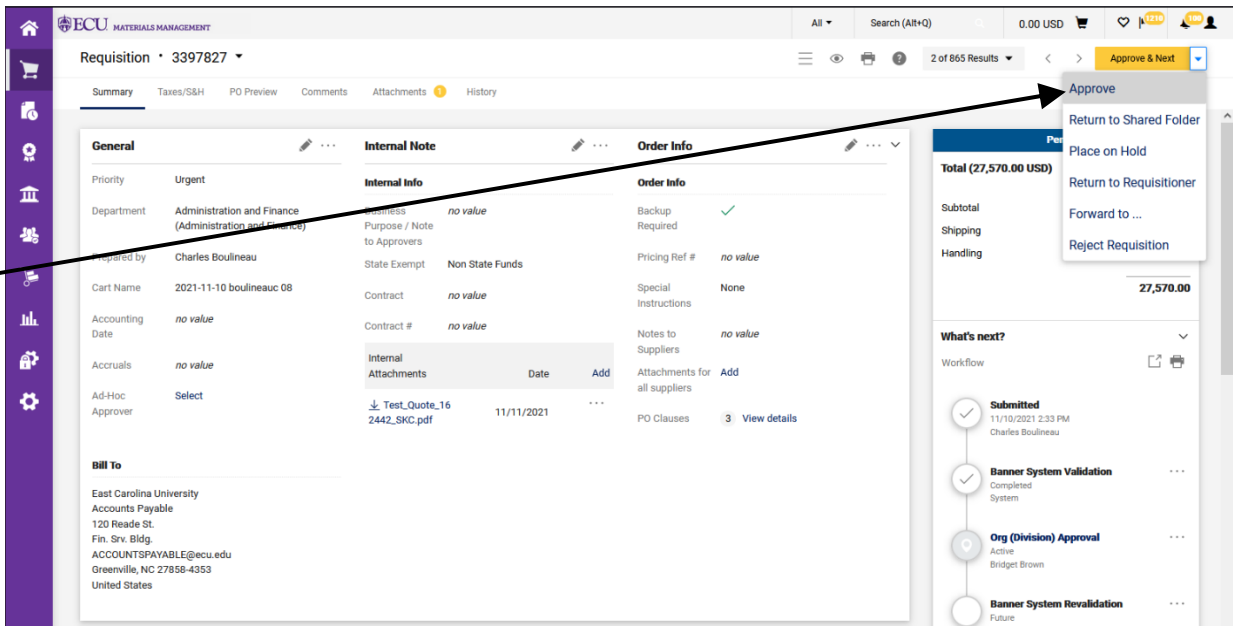
23. If necessary, click **FOAPAL Codes** option to allow changes to the FOAPAL string for selected line item. See Review Cart Header procedure, steps 17 – 29.
Note: For Ship To edits see Review Header Items procedure, steps 31 – 43.

APPROVALS

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24. After completing all review / edits, select the approval action from the **Action** drop down.

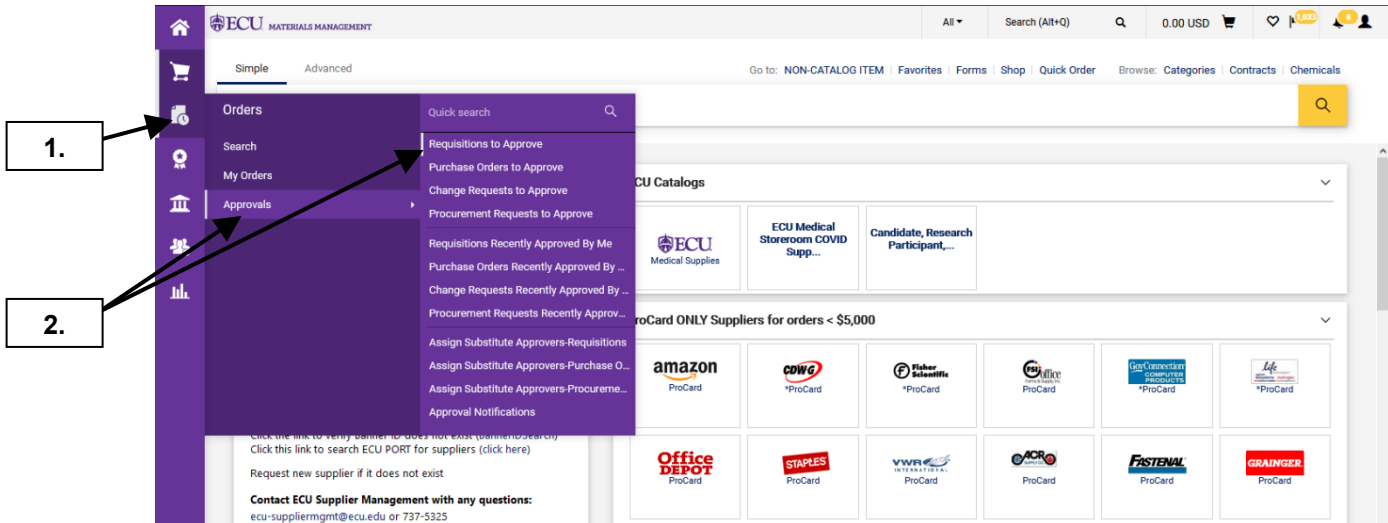


25. The default value in the **Actions** drop down box is **Approve & Next**. For this example, we will select **Approve**.

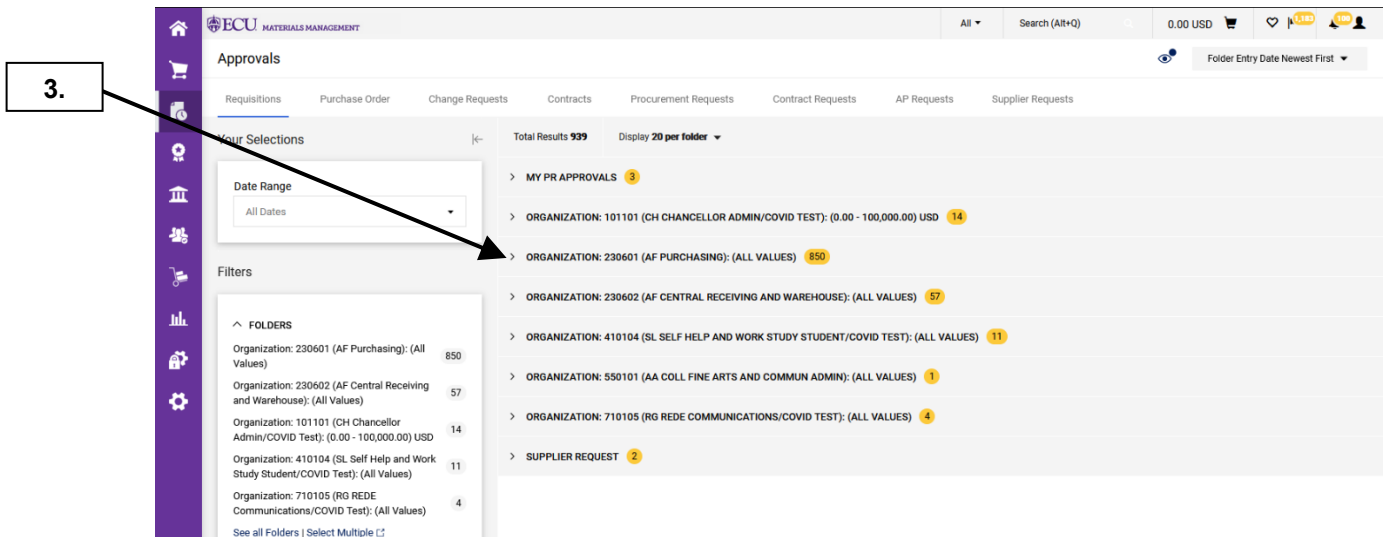
26. This completes steps for this procedure. Click on **ECU** icon to return to home page.

APPROVALS – QUICK VIEW

Last Updated on: 11/12/2021



1. Hover on the **Orders** icon.
2. Select **Approvals** and then click on **Requisitions to Approve**.



3. Select an approval folder to view the listing of requisitions requiring your approval.

APPROVALS – QUICK VIEW

Last Updated on: 11/12/2021

The screenshot shows the 'Approvals' page in ECU Materials Management. At the top, there are navigation tabs for Requisitions, Purchase Order, Change Requests, Contracts, Procurement Requests, Contract Requests, AP Requests, and Supplier Requests. Below these, a summary shows 'Total Results 939' and 'Display 20 per folder'. A list of requisitions is displayed with columns: REQUISITION NO., SUPPLIERS, ASSIGNED APPROVER, PR DATE/TIME, REQUISITIONER, and AMOUNT. A sidebar on the left contains filters for FOLDERS, PRIORITY, and SUPPLIER. Callout box 4 points to a requisition row, and callout box 5 points to the Quick View icon in the same row.

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 in your approval folder, click the **Quick View** icon.

The screenshot shows the 'Requisition Summary - 3397827' overlay. The overlay is divided into several sections: General, Internal Info, Internal Note, Order Info, Bill To, and Ship To. Callout box 6 points to the 'Print' and 'Close' buttons at the top right. Callout box 7 points to the 'Assign' and 'Approve' buttons. Callout box 8 points to the 'FOAPAL / Ship Codes' table at the bottom of the overlay.

Chart	Fund	Organization	Account	Program	Activity	Location
E	111151	230601	72110	0000	no value	no value
East Carolina University AA Libraries AF Purchasing Office Supplies Default Program Code						

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 the **Quick View** overlay to see item information for the requisition.

APPROVALS – QUICK VIEW

Last Updated on: 11/12/2021

9.

9. After reviewing all the items, scroll back to the top of the **Quick View** to take action.

10.

10. Click the **Approve** button to complete a **Quick View** approval for this requisition.
Note: If more time is needed for review, you can click the **Assign** button.

APPROVALS – QUICK VIEW

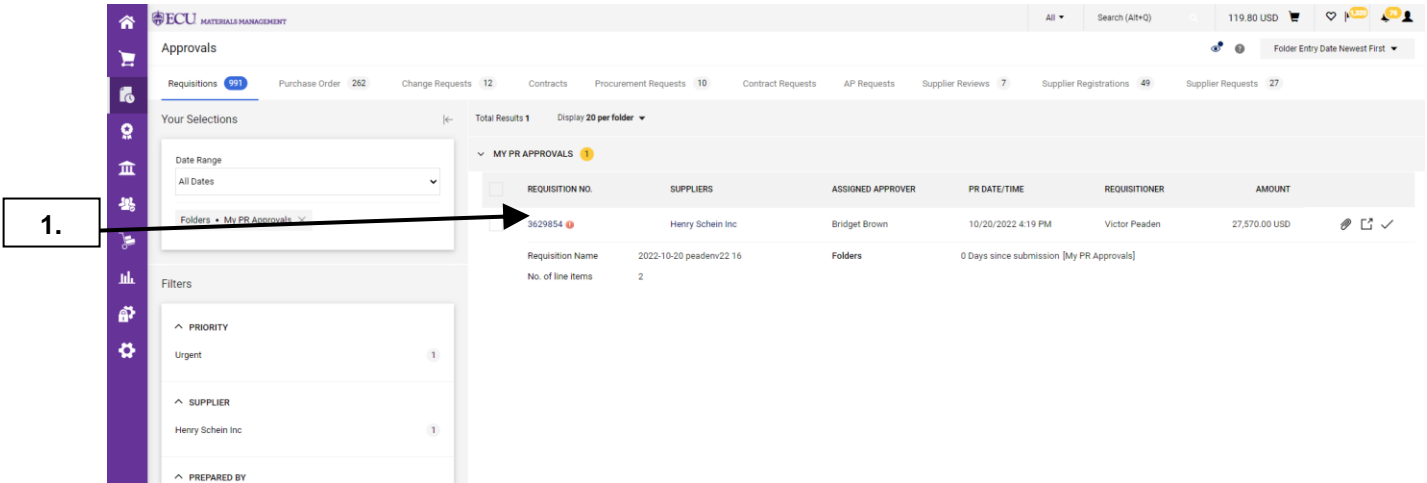
Last Updated on: 11/12/2021

The screenshot displays the 'Approvals' section of the ECU Materials Management system. The top navigation bar includes 'ECU MATERIALS MANAGEMENT', a search bar, and a currency indicator of '0.00 USD'. The main content area shows a list of requisitions under the 'Approvals' tab. The left sidebar contains filters for 'Date Range' (set to 'All Dates'), 'Filters', 'FOLDERS', 'PRIORITY', and 'SUPPLIER'. The 'FOLDERS' filter is expanded, showing various organizational folders with their respective counts. The main table lists requisitions with the following columns: REQUISITION NO., SUPPLIERS, ASSIGNED APPROVER, PR DATE/TIME, REQUISITIONER, and AMOUNT. A callout box labeled '11.' points to the requisition with ID 3397776, which is associated with the supplier 'Henry Schein Inc' and has an amount of 3,500.00 USD. The requisition is marked as 'Not Assigned' and was submitted on 11/10/2021 at 2:29 PM. The requisitioner is Charles Boulineau. The table also shows details for other requisitions, including their names, line items, and submission dates.

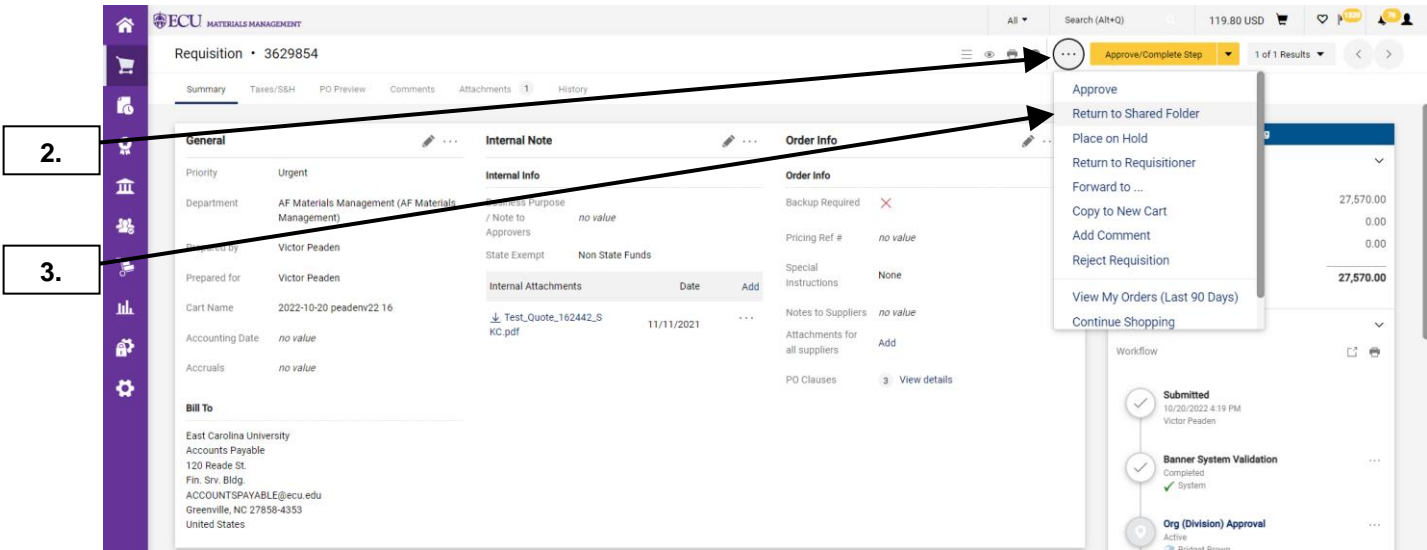
11. The Quick View Approval action removed this requisition from the approval folder.

APPROVALS - RETURN TO SHARED FOLDER

Last Updated on: 11/4/2022



1. The following steps will show how to return a requisition to shared Organization folder when you cannot complete the approval. Click on requisition # in **Approval** folder.



2. Click the **Requisition Actions** dropdown.
3. Select **Return to Shared Folder** from the dropdown list.

APPROVALS - RETURN TO SHARED FOLDER

Last Updated on: 11/4/2022

Requisition • 3629854

Summary Taxes/SSH PO Preview Comments Attachments 1 History

General

Priority Urgent

Department AF Materials Management (AF Materials Management)

Prepared by Victor Peaden

Prepared for Victor Peaden

Cart Name 2022-10-20 peadenv22 16

Accounting Date no value

Accruals no value

Internal Note

Internal Note

Business Purpose / Note to Approvers no value

State Exempt Non State Funds

Internal Attachments

Internal Attachments	Date	Add
Test_Quote_162442_S KC.pdf	11/11/2021	...

Order Info

Order Info

Backup Required

Pricing Ref # no value

Special Instructions None

Notes to Suppliers no value

Attachments for all suppliers Add

PO Clauses 3 View details

Bill To

East Carolina University
Accounts Payable
120 Reade St.
Fin. Srv. Bldg.
ACCOUNTSPAYABLE@ecu.edu
Greenville, NC 27859-4353
United States

Total (27,570.00 USD)

Subtotal 27,570.00

Shipping 0.00

Handling 0.00

27,570.00

What's next?

Workflow

- Submitted 10/20/2022 4:19 PM Victor Peaden
- Banner System Validation Completed System
- Org (Division) Approval Active Bridget Brown

4. Select **Back to Results** from the results dropdown to return to the **My PR Approvals** folder.

Approvals

Requisitions 991 Purchase Order 262 Change Requests 12 Contracts Procurement Requests 10 Contract Requests AP Requests Supplier Reviews 7 Supplier Registrations 49 Supplier Requests 27

Your Selections

Date Range All Dates

Folders • My PR Approvals

Filters

^ PRIORITY Normal 1

^ SUPPLIER

Total Results 1 Display 20 per folder

MY PR APPROVALS 1

REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUISITIONER	AMOUNT
3629850	Henry Schein Inc	Bridget Brown	10/20/2022 4:15 PM	Victor Peaden	3,500.00 USD

Requisition Name 2022-10-20 peadenv22 14

Folders 0 Days since submission [My PR Approvals]

No. of line items 2

5. Notice that requisition was removed from **My PR Approvals** folder and is now in shared **Organization** folder.

APPROVALS – RETURN TO REQUISITIONER

Last Updated on: 11/4/2022

The screenshot shows the 'Approvals' page in the ECU Materials Management system. The top navigation bar includes 'ECU MATERIALS MANAGEMENT', search, and currency. Below the navigation, there are tabs for 'Requisitions' (991), 'Purchase Order' (262), 'Change Requests' (12), 'Contracts', 'Procurement Requests' (10), 'Contract Requests', 'AP Requests', 'Supplier Reviews' (7), 'Supplier Registrations' (49), and 'Supplier Requests' (27). The main content area is titled 'Your Selections' and shows 'Total Results 991' and 'Display 20 per folder'. A dropdown menu is open for 'MY PR APPROVALS' (1), showing a table of requisitions. A callout box labeled '1.' points to the requisition number '3629850' in the table. The table has columns for 'REQUISITION NO.', 'SUPPLIERS', 'ASSIGNED APPROVER', 'PR DATE/TIME', 'REQUISITIONER', and 'AMOUNT'. Below the table, there are details for the selected requisition, including 'Requisition Name', 'No. of line items', and 'Folders'. Another section for 'ADA ACCESSIBILITY REVIEW #6' (1) is also visible, showing another requisition.

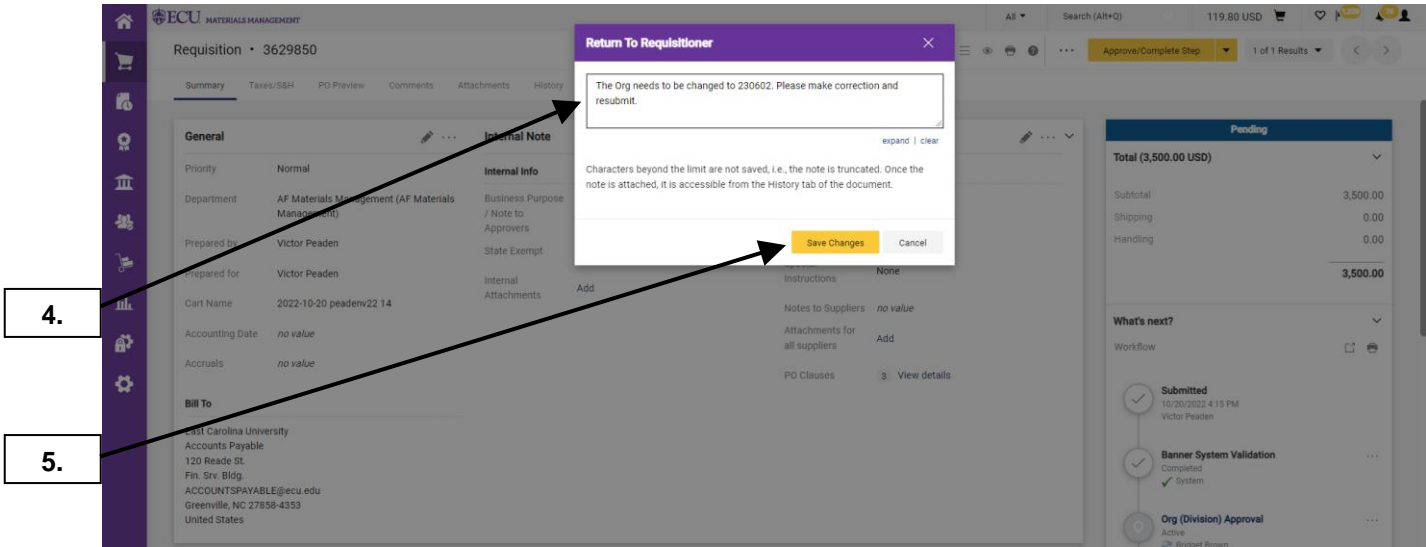
1. The following steps will show how to return a requisition to a requisitioner for changes to be made to the document. Click on requisition # in **My PR Approvals** folder.

The screenshot shows the 'Requisition' page for requisition 3629850. The page has tabs for 'Summary', 'Taxes/S&H', 'PO Preview', 'Comments', 'Attachments', and 'History'. The main content area is divided into sections: 'General', 'Internal Note', 'Internal Info', and 'Order Info'. A callout box labeled '2.' points to the 'Requisition Actions' dropdown menu in the top right corner. A callout box labeled '3.' points to the 'Return to Requisitioner' option in the dropdown list. The dropdown menu includes options: 'Approve', 'Return to Shared Folder', 'Place on Hold', 'Return to Requisitioner', 'Forward to ...', 'Copy to New Cart', 'Add Comment', 'Reject Requisition', 'View My Orders (Last 90 Days)', and 'Continue Shopping'. The 'Workflow' section on the right shows the status of the requisition, including 'Submitted' (10/20/2022 4:15 PM), 'Banner System Validation' (Completed), and 'Org (Division) Approval' (Active).

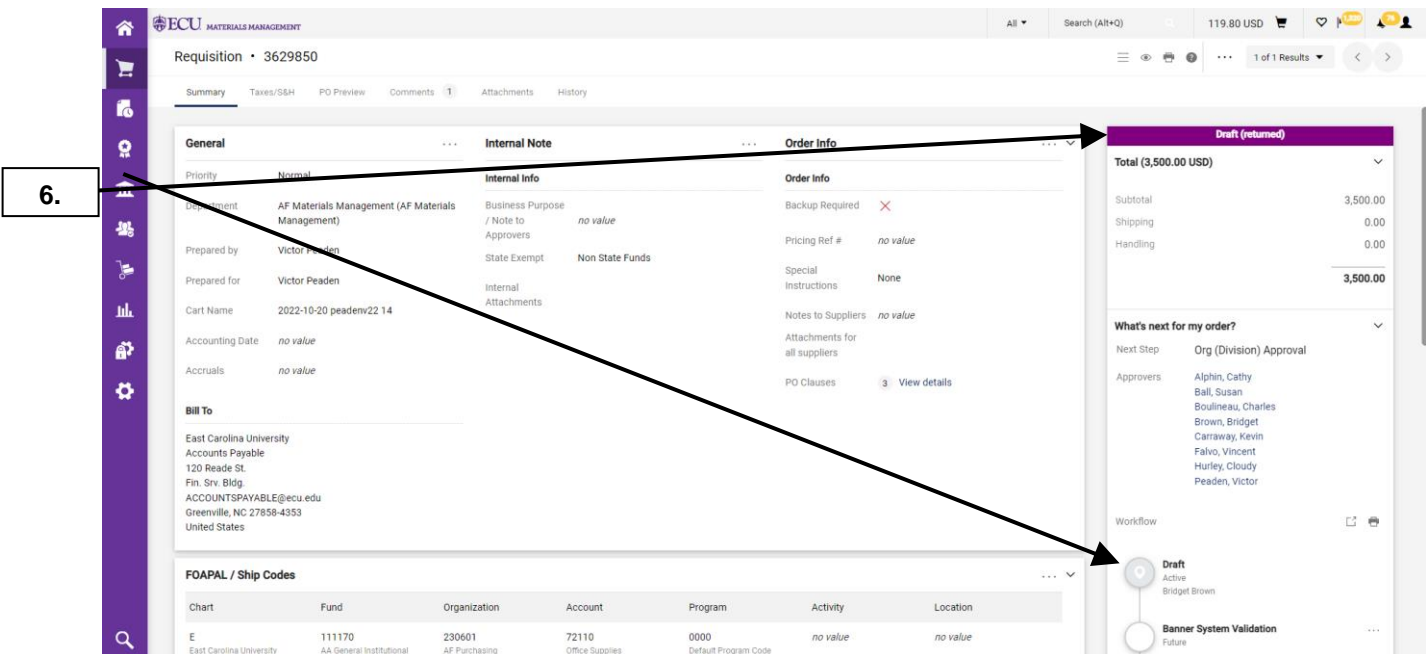
2. Click the **Requisition Actions** dropdown.
3. Select **Return to Requisitioner** from the dropdown list.

APPROVALS – RETURN TO REQUISITIONER

Last Updated on: 11/4/2022



4. Enter details for returning the requisition back to the requisitioner.
5. Click the **Save Changes** button.



6. The requisition has been returned to the requisitioner as indicated by the document status and workflow. This completes steps for this procedure.

APPROVALS - FORWARD TO

Last Updated on: 11/4/2022

The screenshot shows the 'Approvals' page in the ECU Materials Management system. The top navigation bar includes 'ECU MATERIALS MANAGEMENT', search, and currency (119.80 USD). Below the navigation, there are tabs for 'Requisitions' (990), 'Purchase Order' (262), 'Change Requests' (12), 'Contracts', 'Procurement Requests' (10), 'Contract Requests', 'AP Requests', 'Supplier Reviews' (7), 'Supplier Registrations' (49), and 'Supplier Requests' (27). The main content area is titled 'Your Selections' and shows a table of requisitions. A box labeled '1.' points to the requisition number '3629854' in the 'MY PR APPROVALS' folder. The table has columns for 'REQUISITION NO.', 'SUPPLIERS', 'ASSIGNED APPROVER', 'PR DATE/TIME', 'REQUISITIONER', and 'AMOUNT'. Below the table, there are filters for 'PRIORITY' (Urgent) and 'SUPPLIER' (Henry Schein Inc).

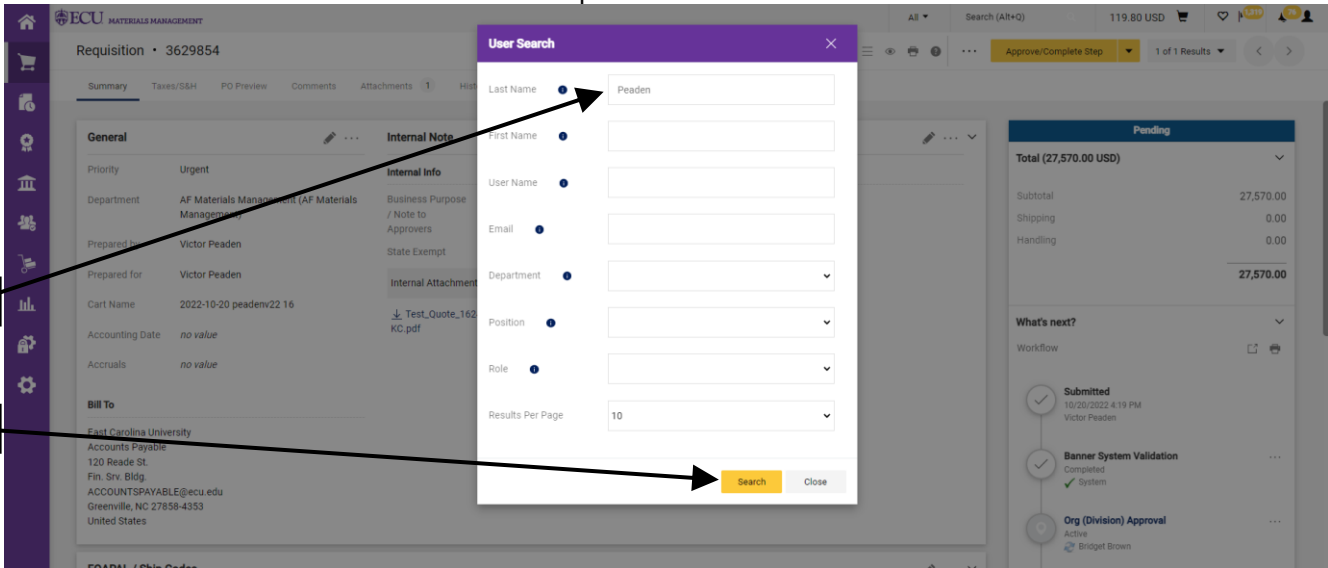
1. The following steps will show how to forward a requisition to another Division Approver for this Org folder in the event you cannot complete approval. Click on requisition # in **My PR Approvals** folder.

The screenshot shows the 'Requisition' details page for requisition 3629854. The page is divided into several sections: 'General', 'Internal Note', 'Internal Info', and 'Order Info'. A box labeled '2.' points to the 'Requisition Actions' dropdown menu in the top right corner. A box labeled '3.' points to the 'Forward to ...' option in the dropdown list. The dropdown menu includes options: 'Approve', 'Return to Shared Folder', 'Place on Hold', 'Return to Requisitioner', 'Forward to ...', 'Copy to New Cart', 'Add Comment', 'Reject Requisition', 'View My Orders (Last 90 Days)', and 'Continue Shopping'. The 'Workflow' section at the bottom shows the status of the requisition, including 'Submitted' (10/20/2022 4:19 PM by Victor Peaden), 'Banner System Validation' (Completed), and 'Org (Division) Approval' (Active).

2. Click the **Requisition Actions** dropdown.
3. Select the **Forward To ...** option from the dropdown list.

APPROVALS - FORWARD TO

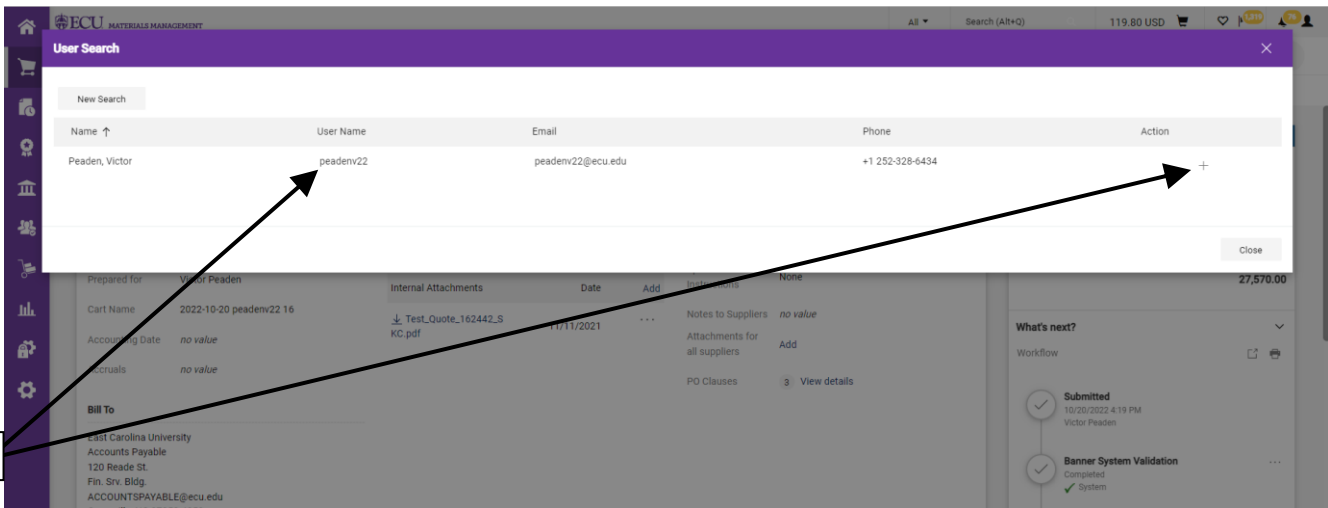
Last Updated on: 11/4/2022



4.

5.

4. Enter **Last Name** of a Division Approver in the **User Search** pop-up.
5. Click the **Search** button.

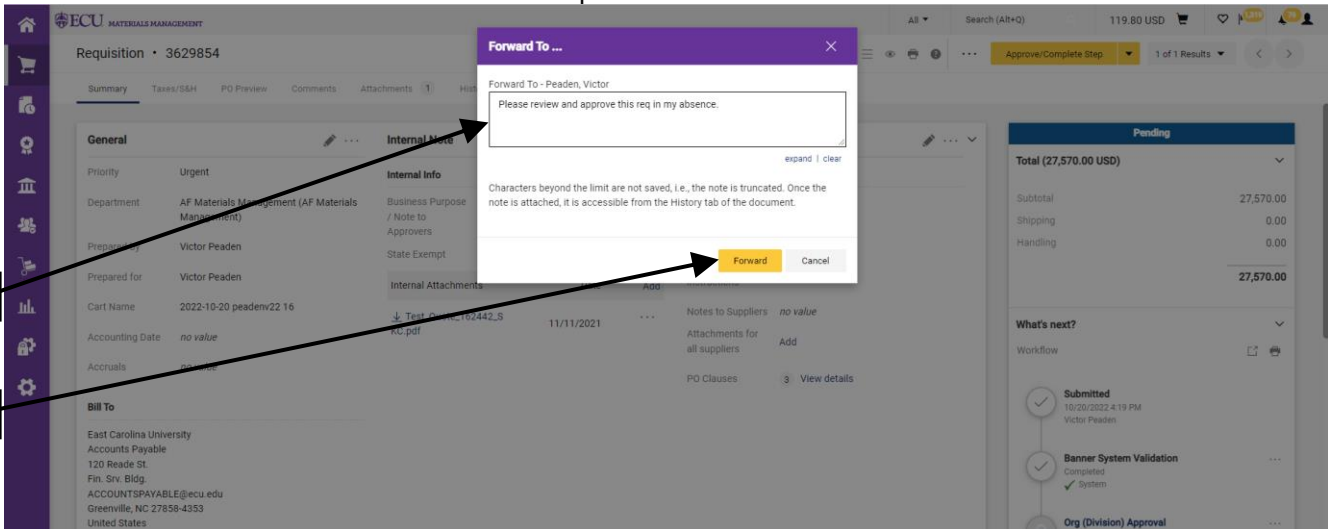


6.

6. Verify the desired user account and click (+).

APPROVALS - FORWARD TO

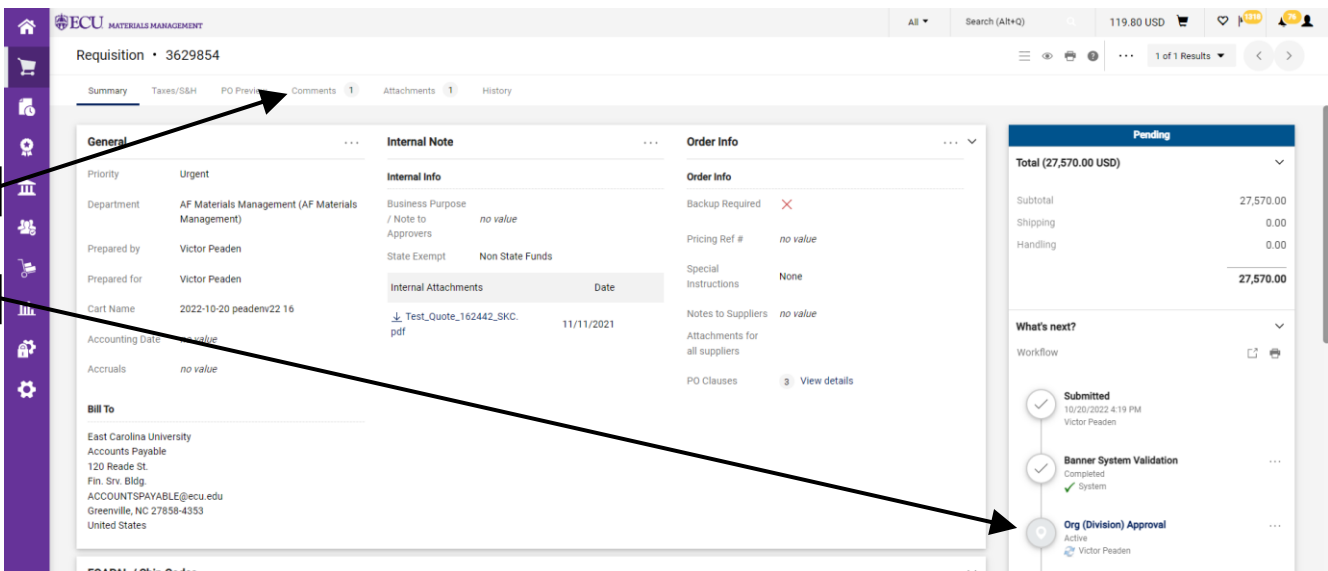
Last Updated on: 11/4/2022



7.

8.

7. Enter an appropriate note in the **Forward to...** pop-up.
8. Click **Forward** button.



9.

10.

9. The **Forward To** reason will be included in the document's **Comment Tab**.
10. The document workflow step will indicate which approver has been assigned the document through forwarding.

APPROVALS – PLACE ON HOLD

Last Updated on: 11/4/2022

The screenshot shows the 'Approvals' page in the ECU Materials Management system. The top navigation bar includes 'ECU MATERIALS MANAGEMENT', search, and currency (119.80 USD). The main content area displays a list of requisitions under the 'MY PR APPROVALS' folder. A box labeled '1.' points to the left-hand navigation menu.

REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUISITIONER	AMOUNT
3629839	Govconnection Inc	Bridget Brown	10/20/2022 4:06 PM	Victor Peadar	6,190.00 USD
Requisition Name		2022-10-20 peadenv22 11	Folders	0 Days since submission [My PR Approvals]	
No. of line items		2			
3629809	Govconnection Inc	Bridget Brown	10/20/2022 4:04 PM	Victor Peadar	5,075.00 USD
Requisition Name		2022-10-20 peadenv22 10	Folders	0 Days since submission [My PR Approvals]	
No. of line items		2			

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.

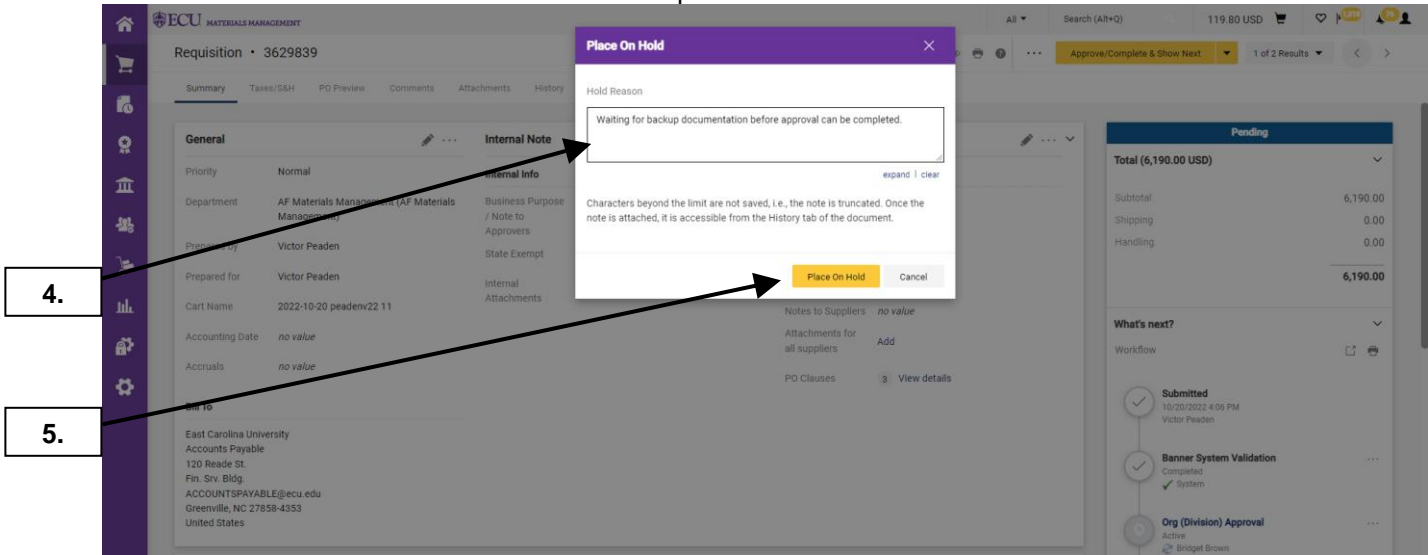
The screenshot shows the 'Requisition' page for requisition 3629839. The page is divided into several sections: General, Internal Note, and Order Info. A dropdown menu is open, showing options like 'Place on Hold'. Boxes labeled '2.' and '3.' point to the dropdown menu and the 'Place on Hold' option respectively.

General	Internal Note	Order Info
Priority: Normal	Business Purpose / Note to Approvers: no value	Backup Required: X
Department: AF Materials Management (AF Materials Management)	State Exempt: Non State Funds	Pricing Ref #: no value
Prepared by: Victor Peadar	Internal Attachments: Add	Special Instructions: None
Prepared for: Victor Peadar		Notes to Suppliers: no value
Cart Name: 2022-10-20 peadenv22 11		Attachments for all suppliers: Add
Accounting Date: no value		PO Clauses: 3 View details
Accruals: no value		

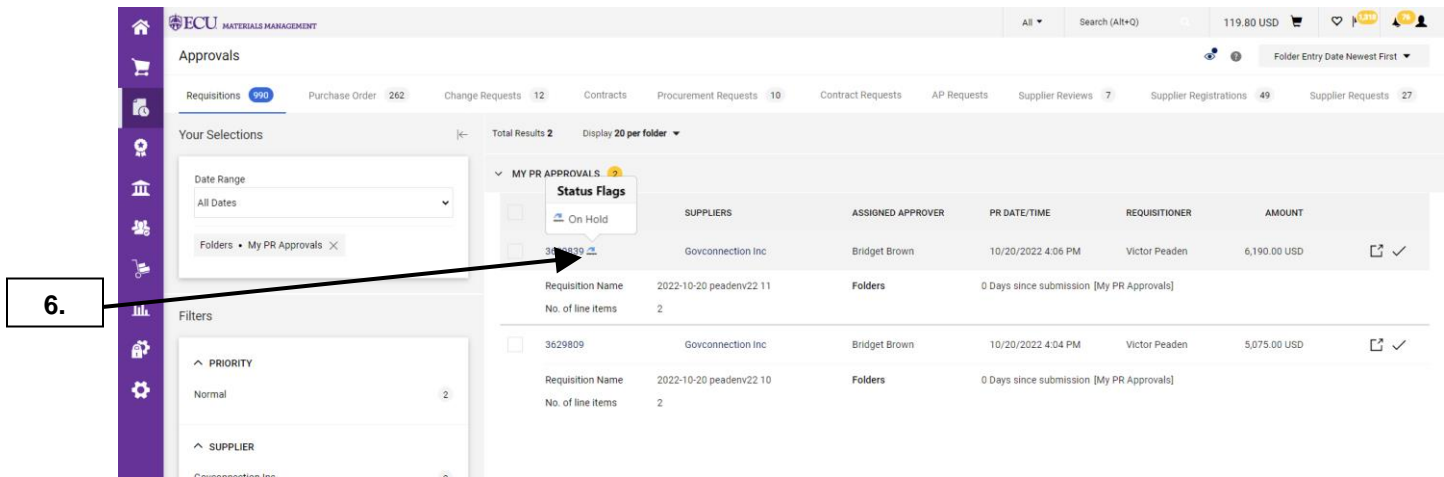
2. Open the **Requisition Actions** dropdown.
3. Select **Place on Hold** from the dropdown list.

APPROVALS – PLACE ON HOLD

Last Updated on: 11/4/2022



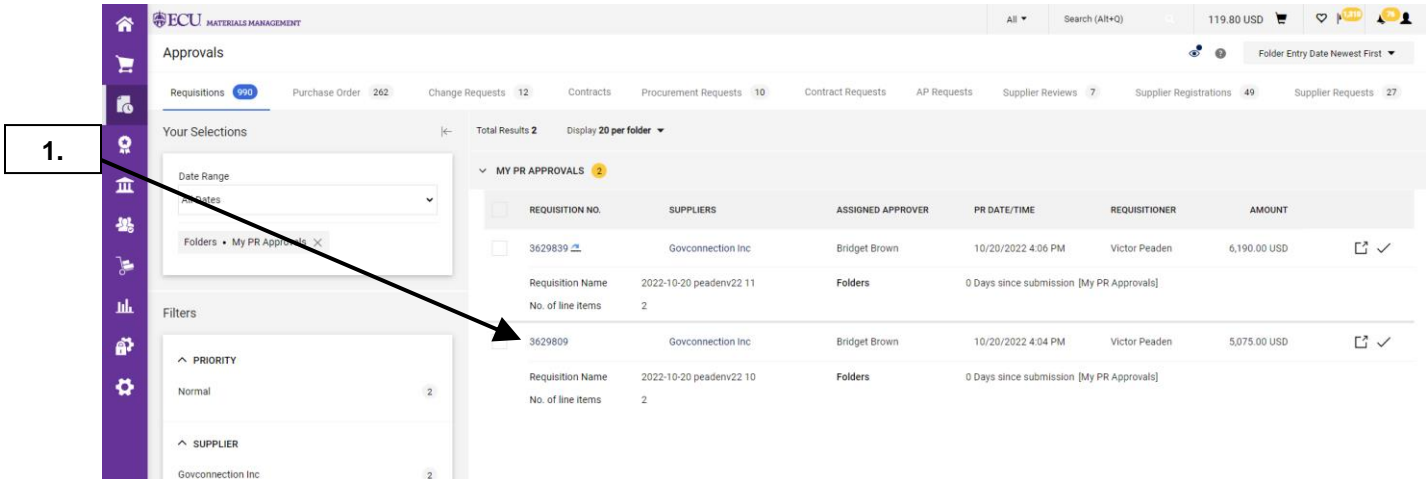
4. Enter **Hold Reason** in **Place on Hold** pop-up.
5. Click **Place on Hold** button.



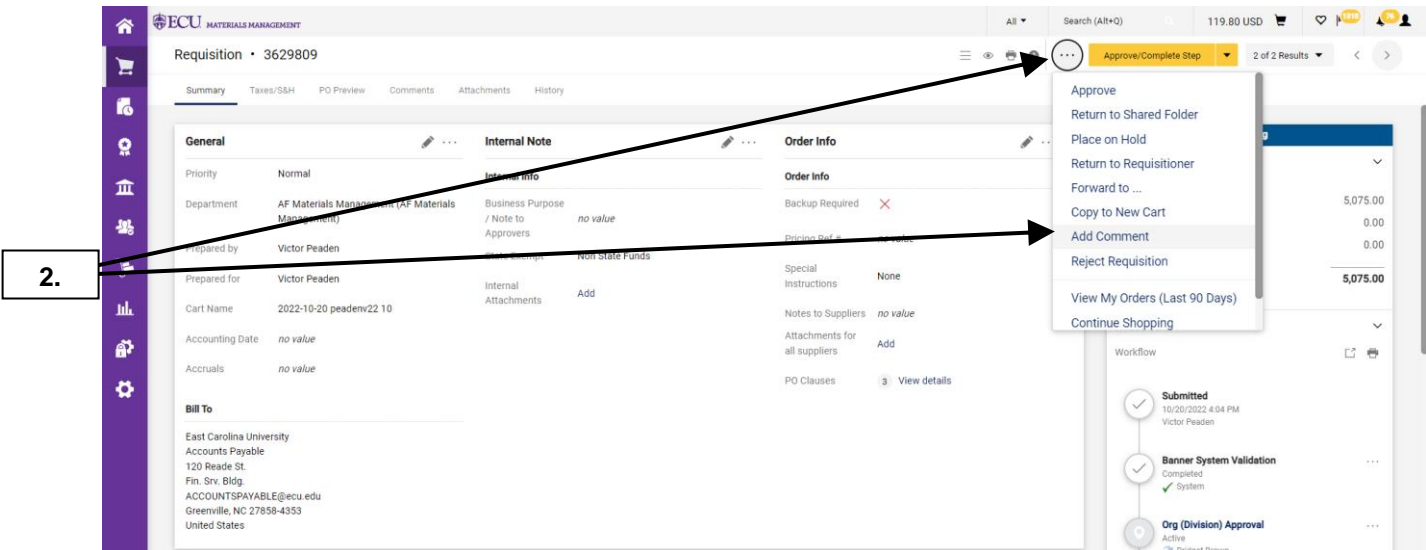
6. The **On Hold** icon indicates the status of the document in **My PR Approvals** folder.
Note: Approval can be completed once the required information has been received.

APPROVALS - ADD COMMENTS

Last Updated on: 11/4/2022



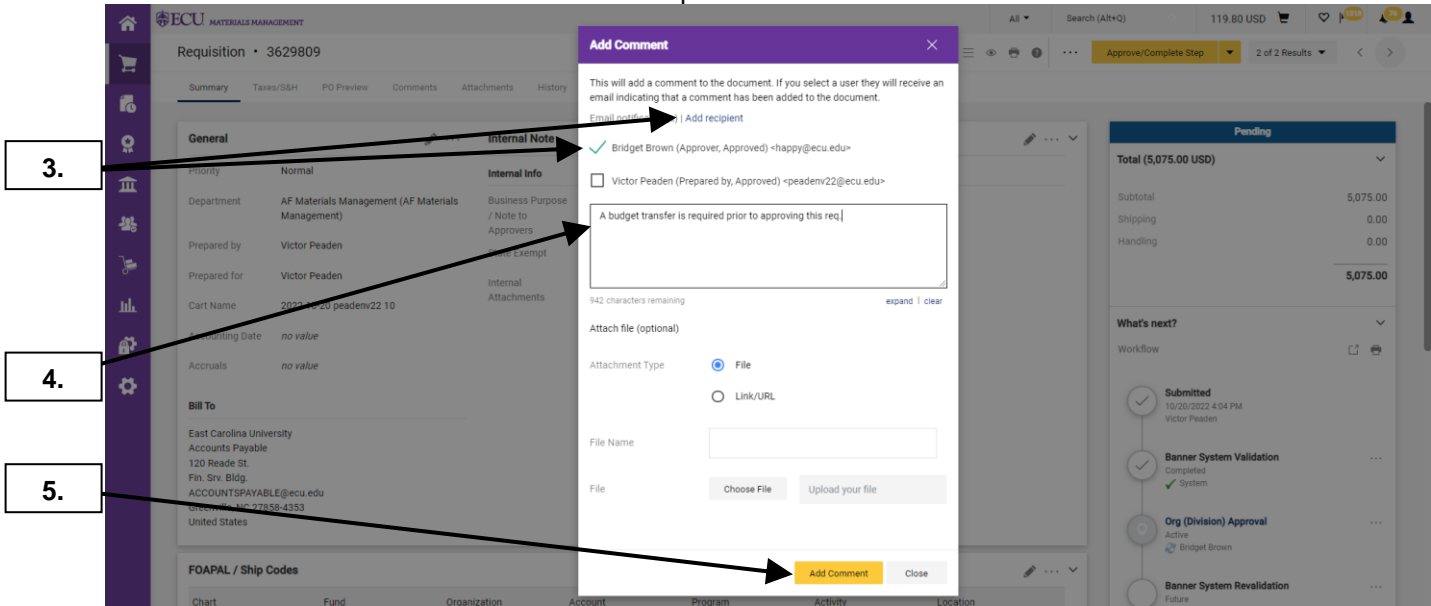
1. The following steps will show how to place comments in history and in the **Comments** tab for a requisition. Click on requisition # in the **My PR Approvals** folder.
Note: Once you add a comment, it cannot be edited or deleted.



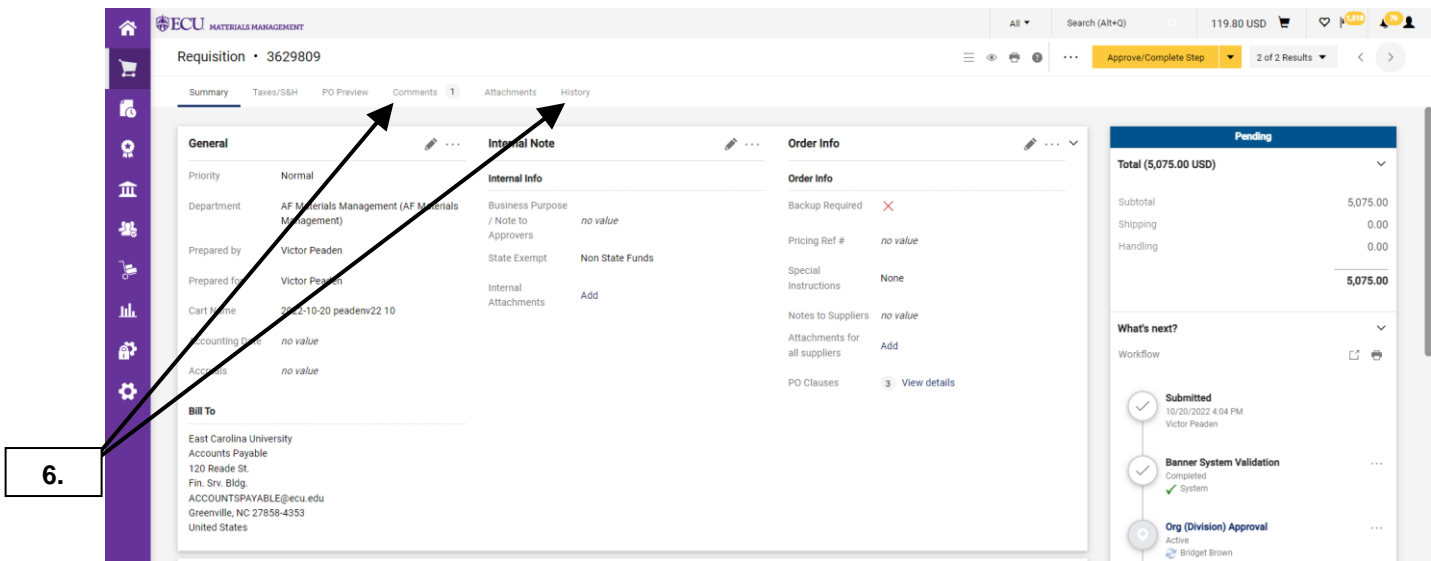
2. Select **Add Comment** from the **Requisition Actions** dropdown.

APPROVALS - ADD COMMENTS

Last Updated on: 11/4/2022



3. Check the box next to any appropriate email notification recipient. Click **Add recipient** for additional PORT users needing to receive notification of the comment.
4. Enter **Comment** in **Add Comment** pop-up.
5. Click the **Add Comment** button.



6. Click on **History** tab to view the comment.
Note the Comments tab has updated to reflect the new comment.

APPROVALS - ADD COMMENTS

Last Updated on: 11/4/2022

8. Click on the **Comments** tab to view the comment only.

7. The comment is displayed in the **Note** column under the document **History** tab.

Line No	Date/Time	User	Step(s)	Action	Field Name	From	To	Note
	11/4/2022 4:12:40 PM	Bridget Brown		Comment Added				A budget transfer is required prior to approving this req.
	11/4/2022 4:06:31 PM	Bridget Brown	Org (Division) Approval	Requisition assigned				
	10/20/2022 4:04:26 PM	System	Banner System Validation	Requisition approved				
Line 1	10/20/2022 4:04:26 PM	System	Banner System Validation	Requisition note added				Item 1, Sequence 1: WARNING: Budget is exceeded for item 1,sequence 1.
	10/20/2022 4:04:22 PM	Victor Peaden		Requisition submitted				

- 7. The comment is displayed in the **Note** column under the document **History** tab.
- 8. Click on the **Comments** tab to view the comment only.

9. Notice the comment in the **Comments** tab with an indication of email notification recipients.

Records found: 1

Show comments for: Requisition

Bridget Brown - 11/4/2022 4:12:40 PM

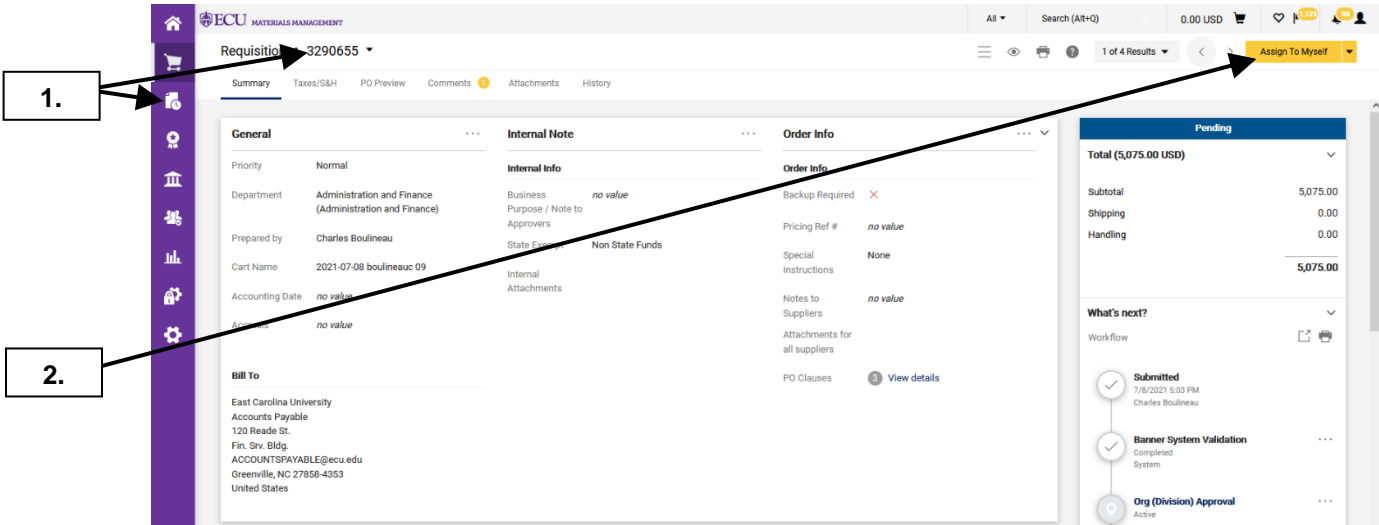
A budget transfer is required prior to approving this req.

Requisition - 3629809 Comment Added

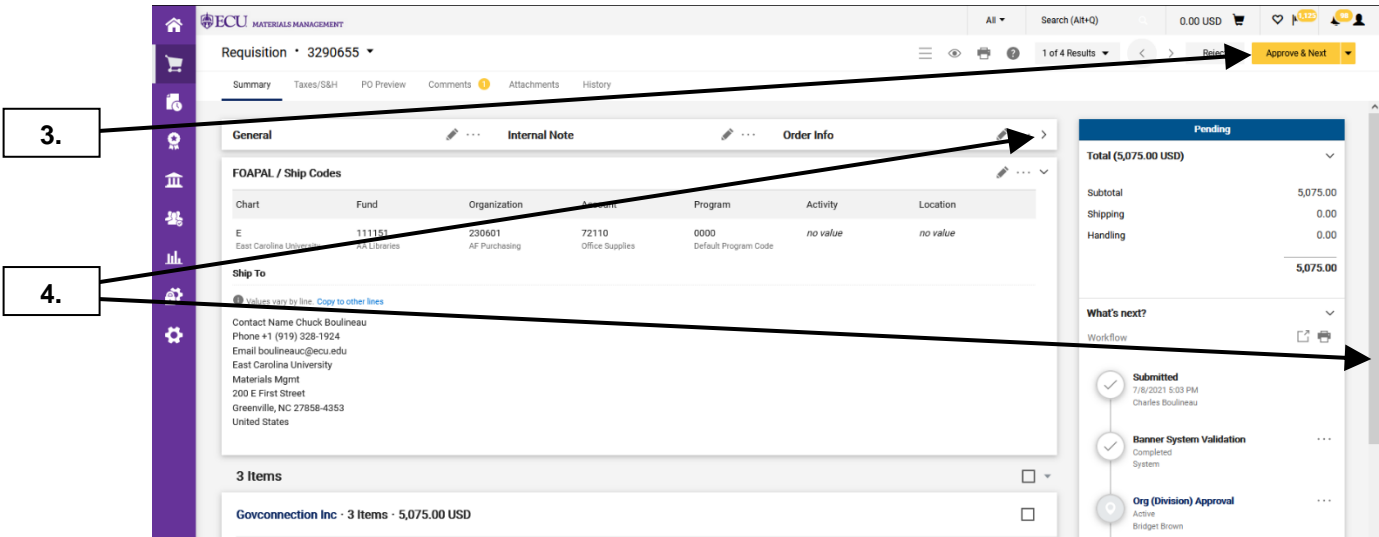
- 9. Notice the comment in the **Comments** tab with an indication of email notification recipients.

APPROVAL – COPY ADDRESS FROM HEADER

Last Updated on: 7/20/2021



1. Navigate to the requisition which needs editing.
2. Requisitions require the user to be an approver or the creator for editing. If you are an approver, assign the document to yourself.



3. Note the change in document action options to Approve indicating that the document is assigned to your user account and can now be edited.
4. Collapse the document header section or scroll down to the **FOAPAL / Ship Codes** section.

APPROVAL – COPY ADDRESS FROM HEADER

Last Updated on: 7/20/2021

The screenshot shows a requisition for 3 items from Govconnection Inc. Item 1 is 'MS Surface Pro' with a unit price of 1,425.00. Item 2 is 'MS Surface Pro w/ Docking station' with a unit price of 1,825.00. A callout box with the number 5 points to a message: "Values have been overridden for this line." The shipping address is listed as Bridget Brown, +1 252-328-1013, brownb@ecu.edu, East Carolina University, One Card System, Greenville, NC 278584353, United States.

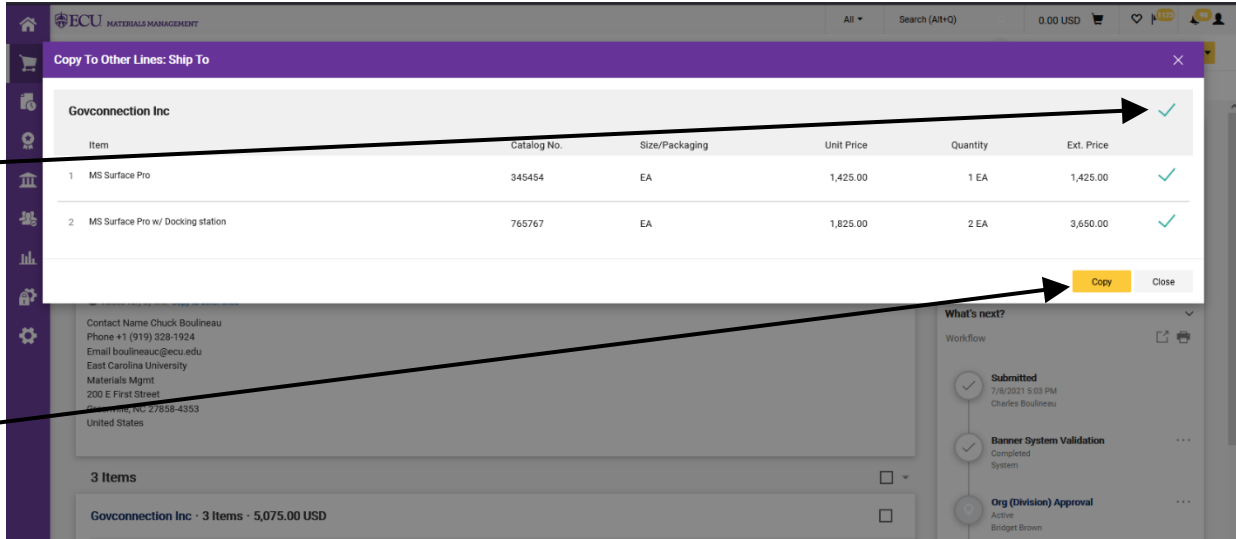
5. Line items with different Ship To addresses will be indicated with the message “Values have been overridden for this line.”

The screenshot shows the 'FOAPAL / Ship Codes' section of the requisition. It contains a table with columns: Chart, Fund, Organization, Account, Program, Activity, and Location. The data row shows: E, 111151, AA Libraries, 230601, 72110, Office Supplies, 0000, Default Program Code, no value, no value. Below the table, there is a 'Ship To' section with a message: "Values vary by line. Copy to other lines." A callout box with the number 6 points to this link. The contact information for Chuck Boulineau is also visible.

6. From the **FOAPAL / Ship Codes** section of your document, confirm the header shipping address is appropriate then click the link **Copy to other lines**.

APPROVAL – COPY ADDRESS FROM HEADER

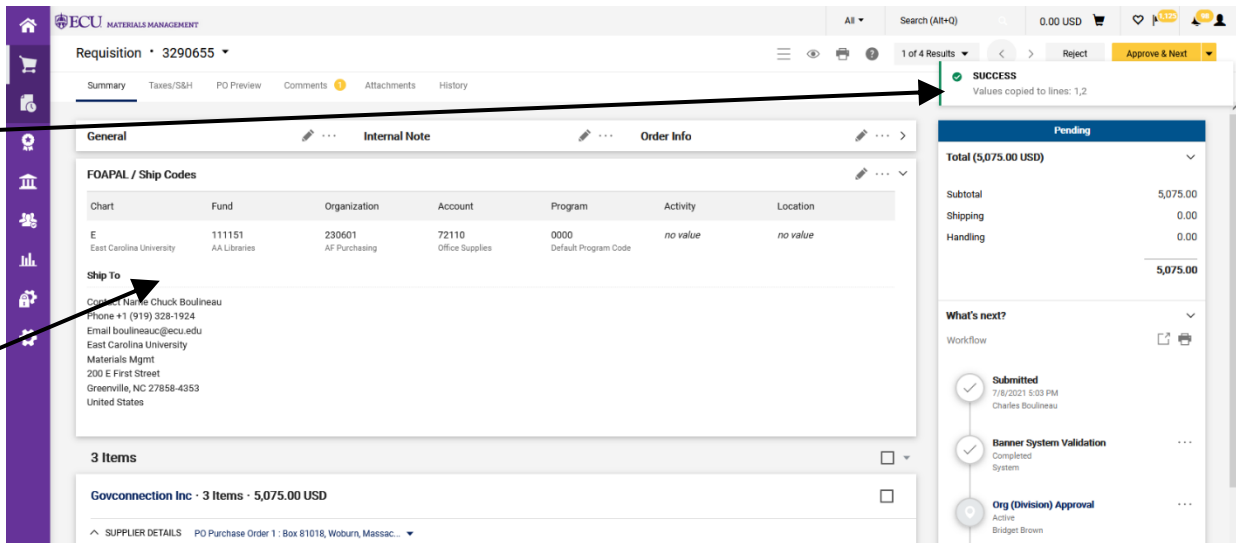
Last Updated on: 7/20/2021



7.

8.

7. Check the box to apply the header **Ship To** against all line items.
8. Click the **Copy** button to execute the change.



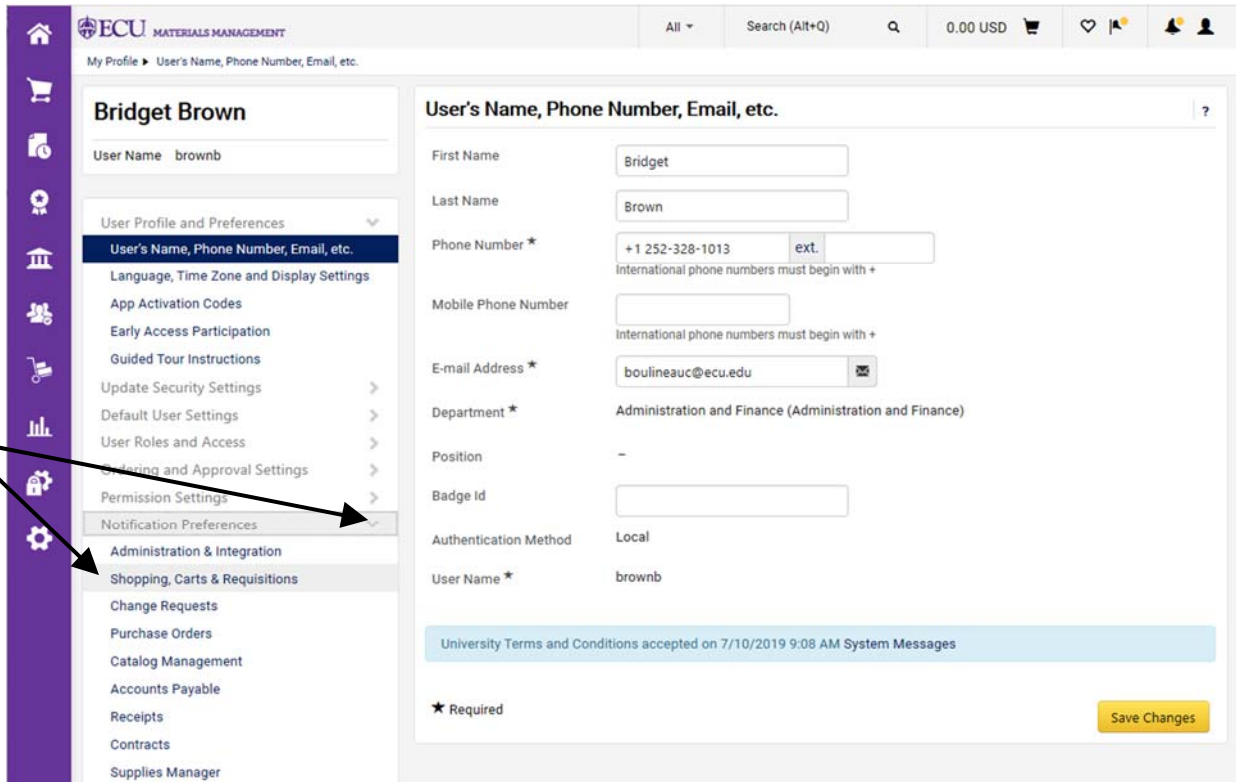
9.

10.

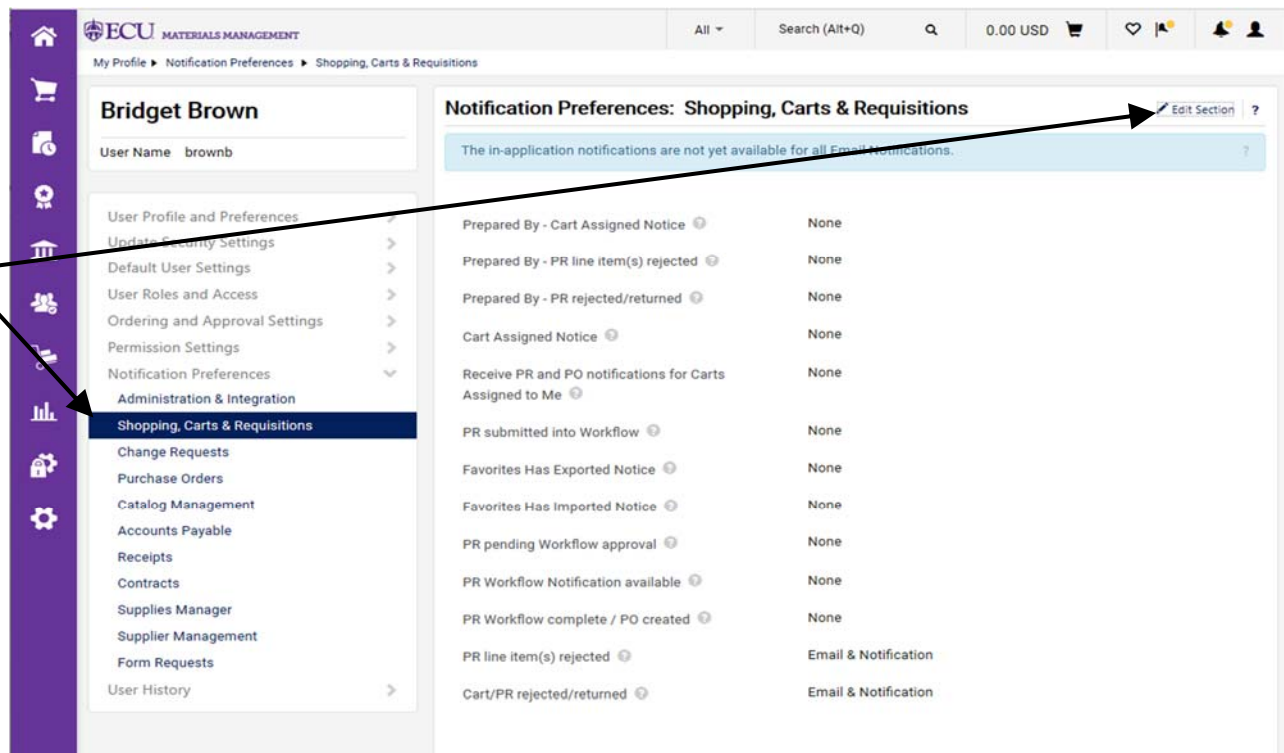
9. Note the **SUCCESS** message for copying the information to all checked line items.
10. The **Copy to other lines message** is no longer visible, indicating that all line items reflect the same Ship To address as the header address.

EMAIL APPROVALS

Last Updated on: 5/28/2021



1. To utilize **Email Approvals** feature, you must have the **PR pending Workflow approval** notification 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: 5/28/2021

Bridget Brown
User Name brownb

Notification Preferences: Shopping, Carts & Requisitions

The in-application notifications are not yet available for all Email Notifications.

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

None
Email
Notification
Email & Notification

Email & Notification

Email & Notification

Save Changes Cancel

3. Click the **Override** radio button and select **Email & Notification** from the dropdown menu.
4. Click **Save Changes**.

Bridget Brown
User Name brownb

Notification Preferences: Shopping, Carts & Requisitions

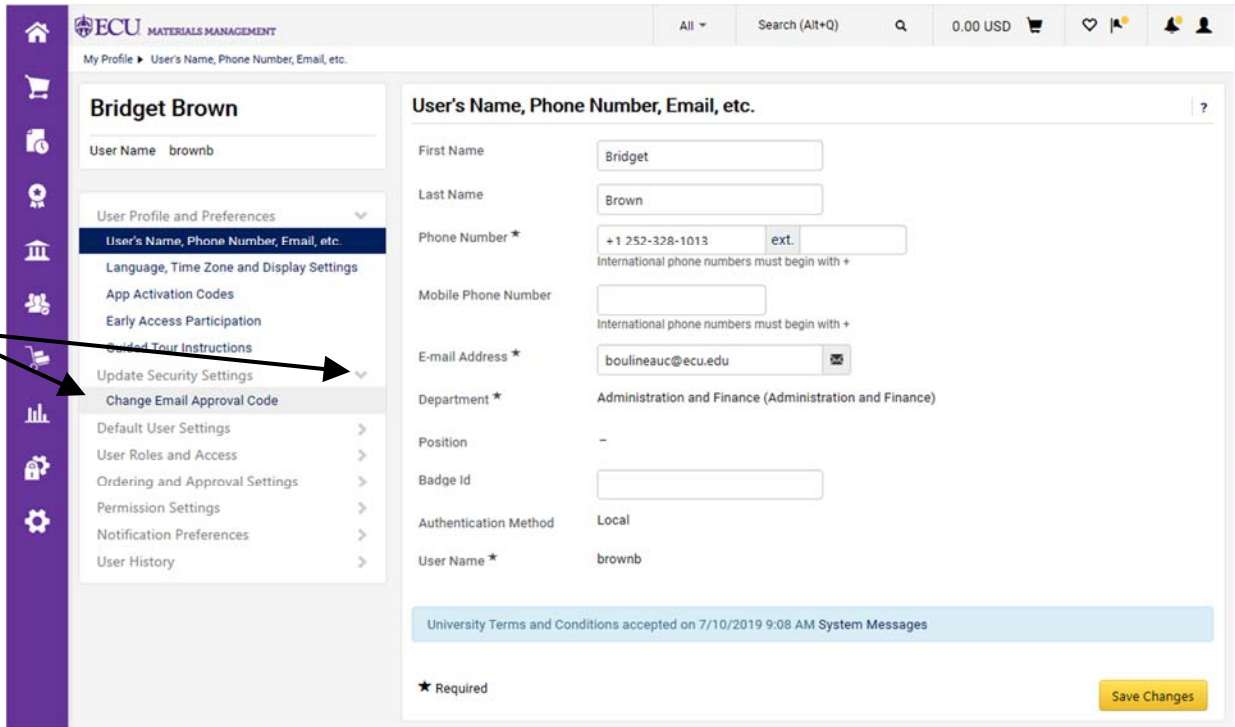
The in-application notifications are not yet available for all Email Notifications.

Prepared By - Cart Assigned Notice	None
Prepared By - PR line item(s) rejected	None
Prepared By - PR rejected/returned	None
Cart Assigned Notice	None
Receive PR and PO notifications for Carts Assigned to Me	None
PR submitted into Workflow	None
Favorites Has Exported Notice	None
Favorites Has Imported Notice	None
PR pending Workflow approval	Email & Notification
PR Workflow Notification available	None
PR Workflow complete / PO created	None
PR line item(s) rejected	Email & Notification
Cart/PR rejected/returned	Email & Notification

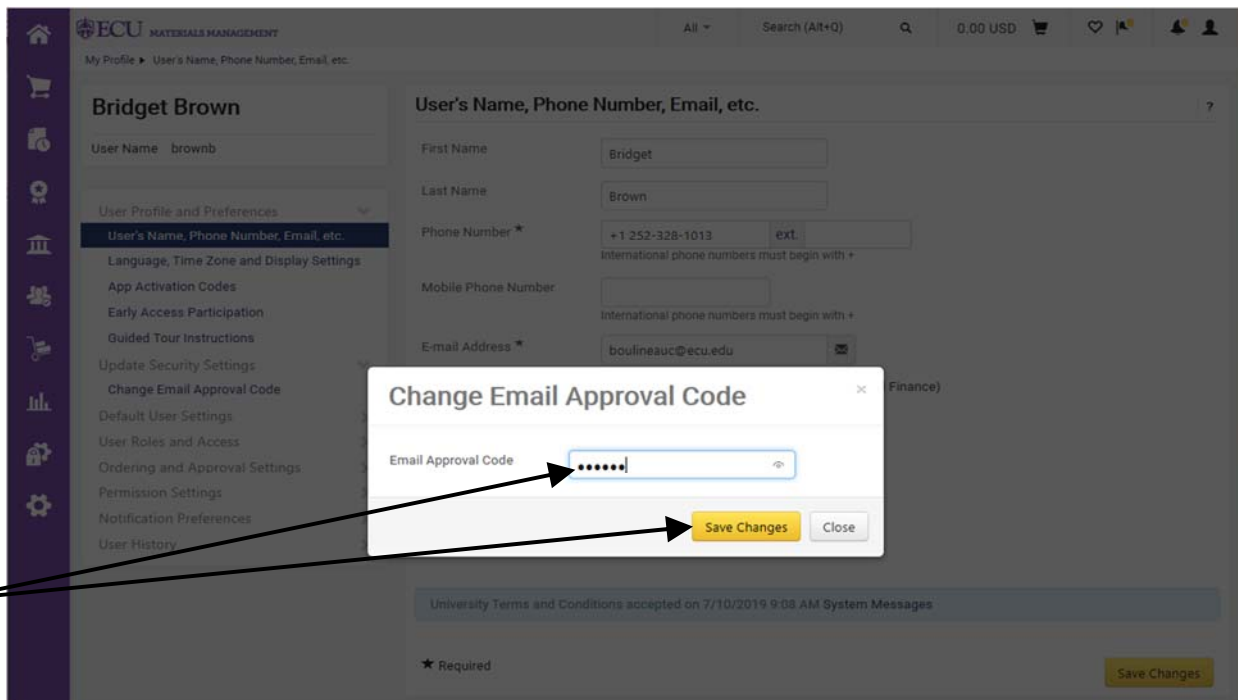
5. Note the saved changes. You will now receive a notification email for requisition approval request.

EMAIL APPROVALS

Last Updated on: 5/28/2021



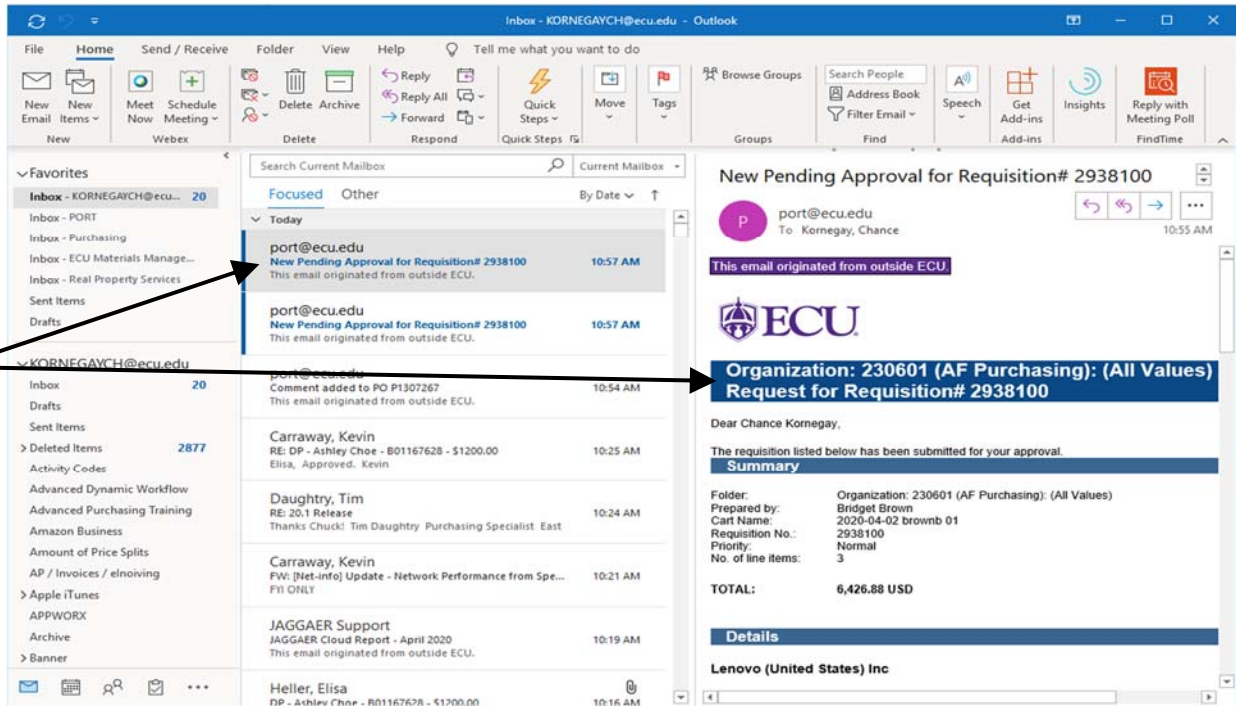
6. Set your Email Approval Code. Navigate to **Update Security Settings** and click on **Change Email Approval Code**.



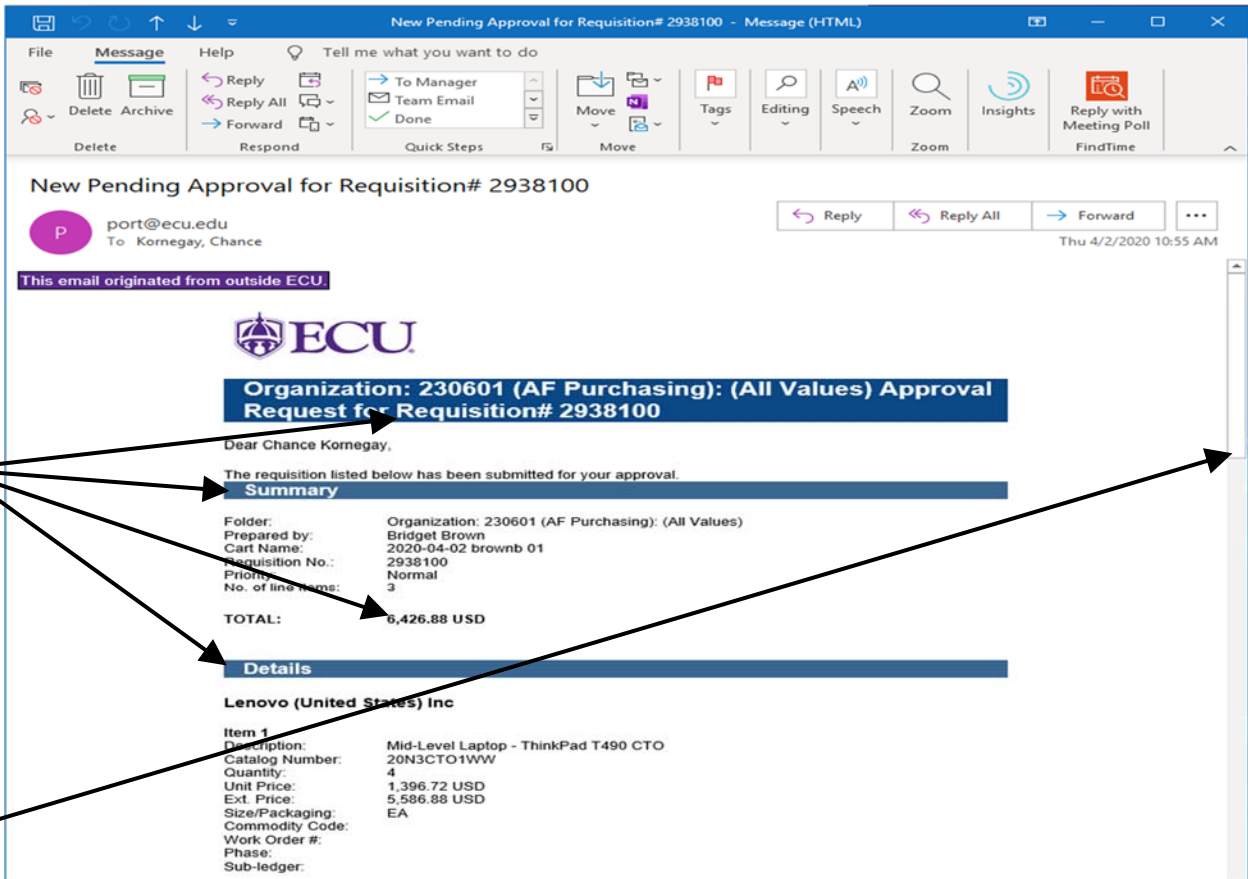
7. Enter a new approval code and click **Save Changes**.
Note: Additional user permission: **Approve/Reject Requisitions via email** is required. Send email request for permission update to PORT@ecu.edu.

EMAIL APPROVALS

Last Updated on: 5/28/2021



8. Open the PORT enhanced approval email to see details of the requisition and **take action**.

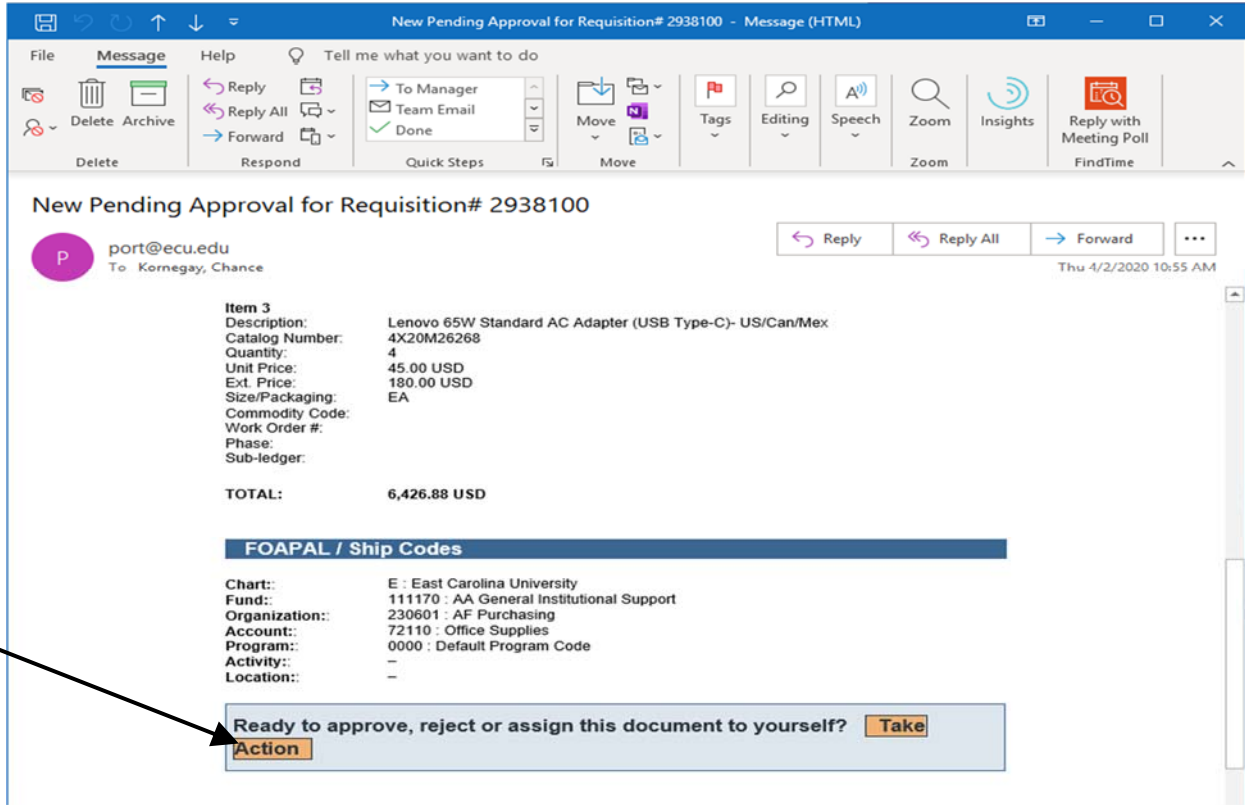


9. Note Summary, Approval Folder, Details, and line item information.

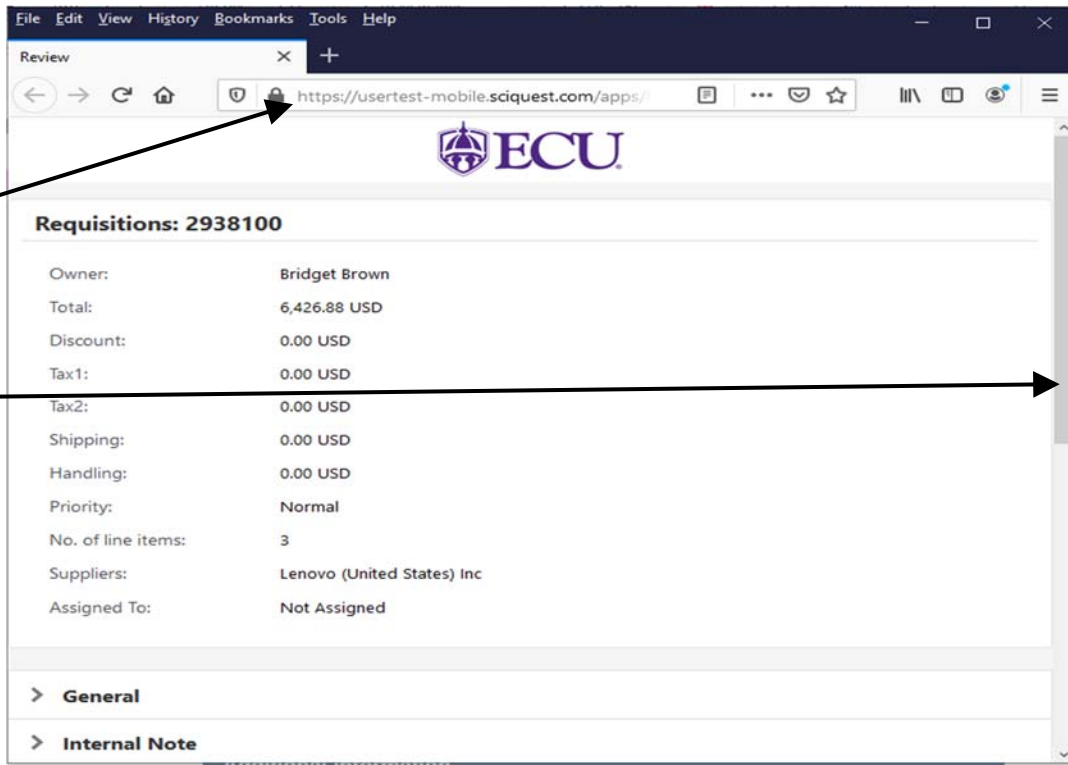
10. Scroll down email to see more details for requisition and **take action**.

EMAIL APPROVALS

Last Updated on: 5/28/2021



11. For this example, we will click on the **Take Action** button to approve this requisition.

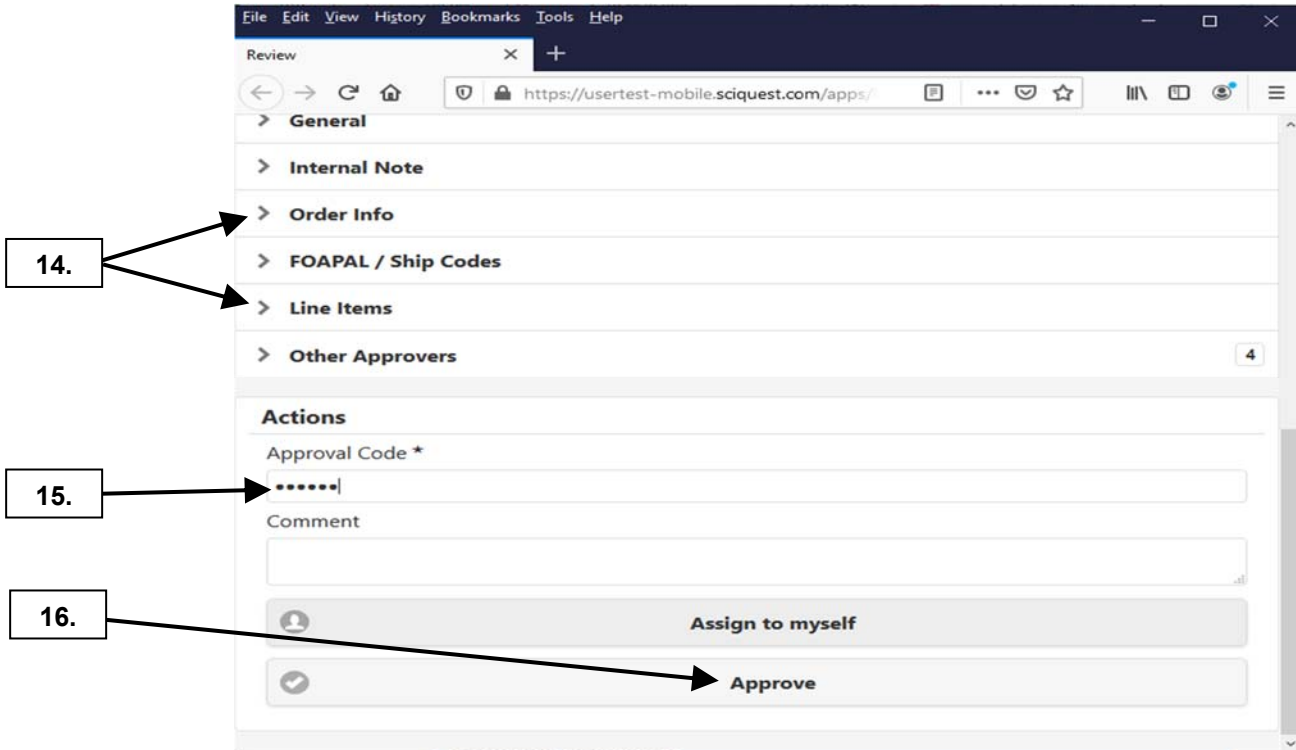


12. A browser window will open with the requisition details.

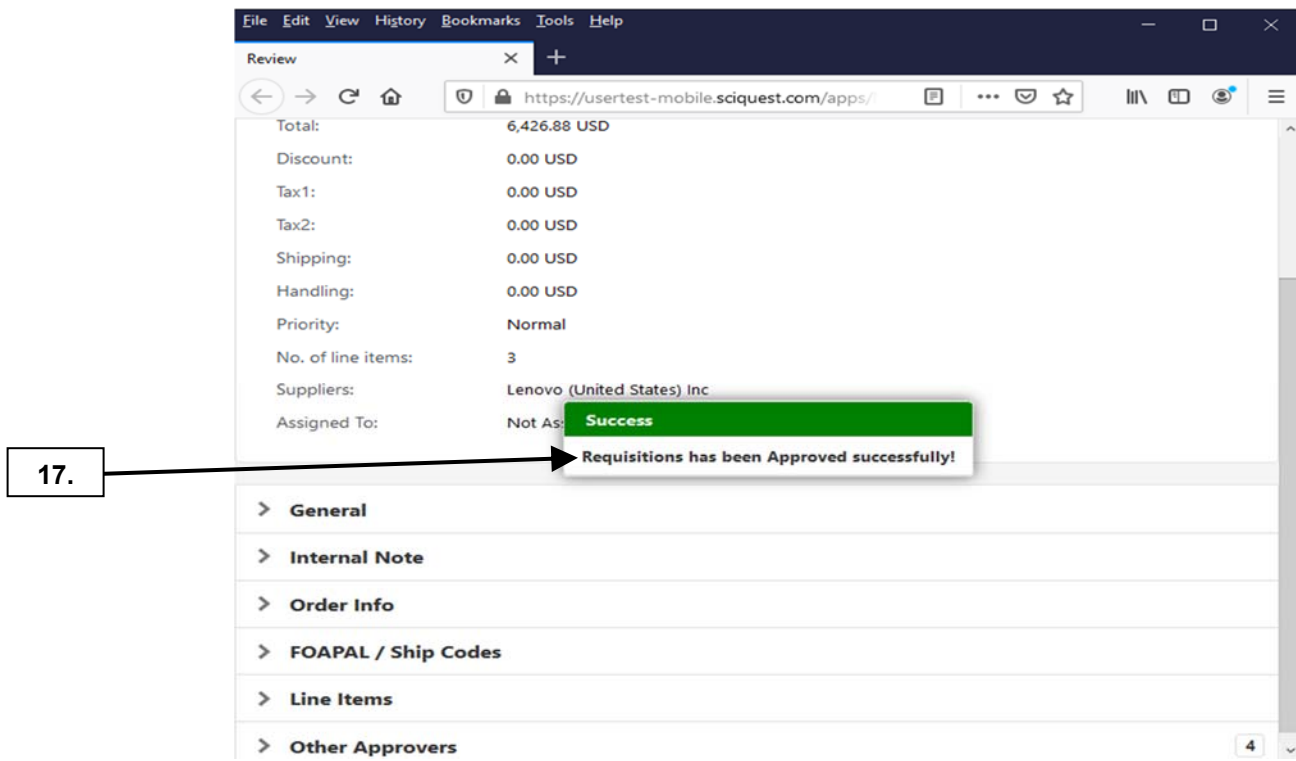
13. Scroll down to view further details and **take action** on the requisition.

EMAIL APPROVALS

Last Updated on: 5/28/2021



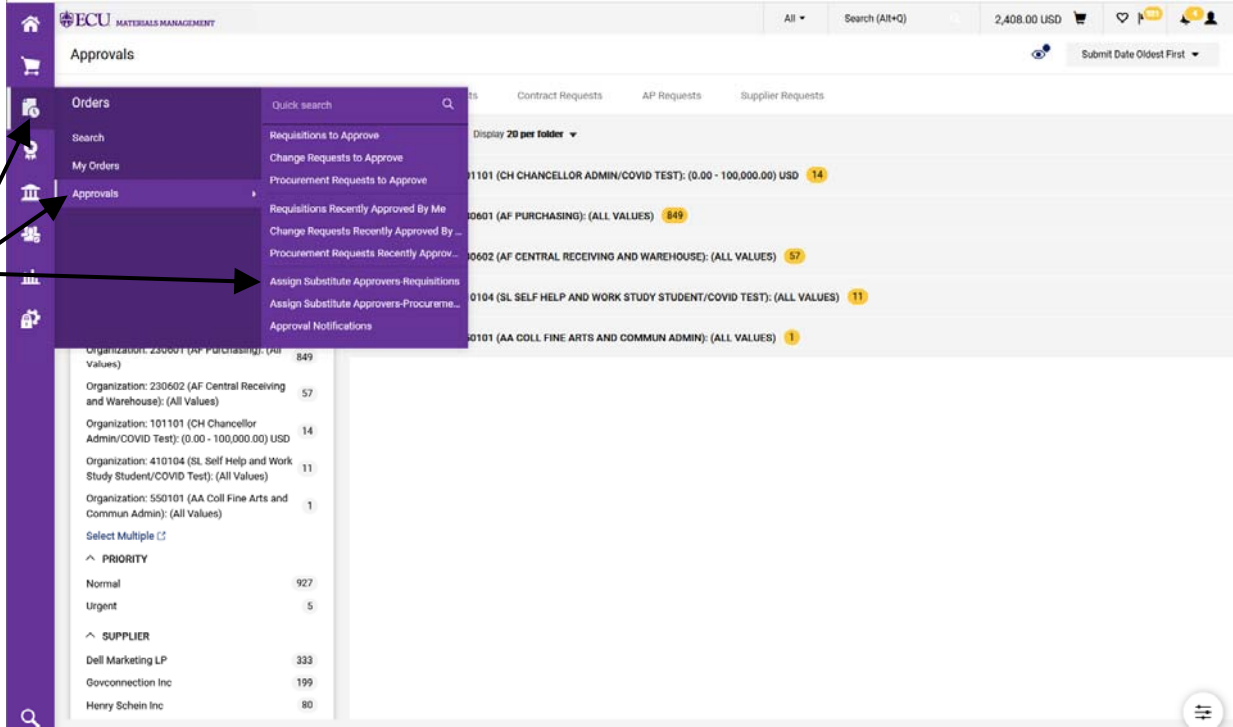
- 14. Use the expansion arrows to review details for the requisition.
- 15. Enter your **Email Approval Code**.
- 16. Click the **Approve** button.



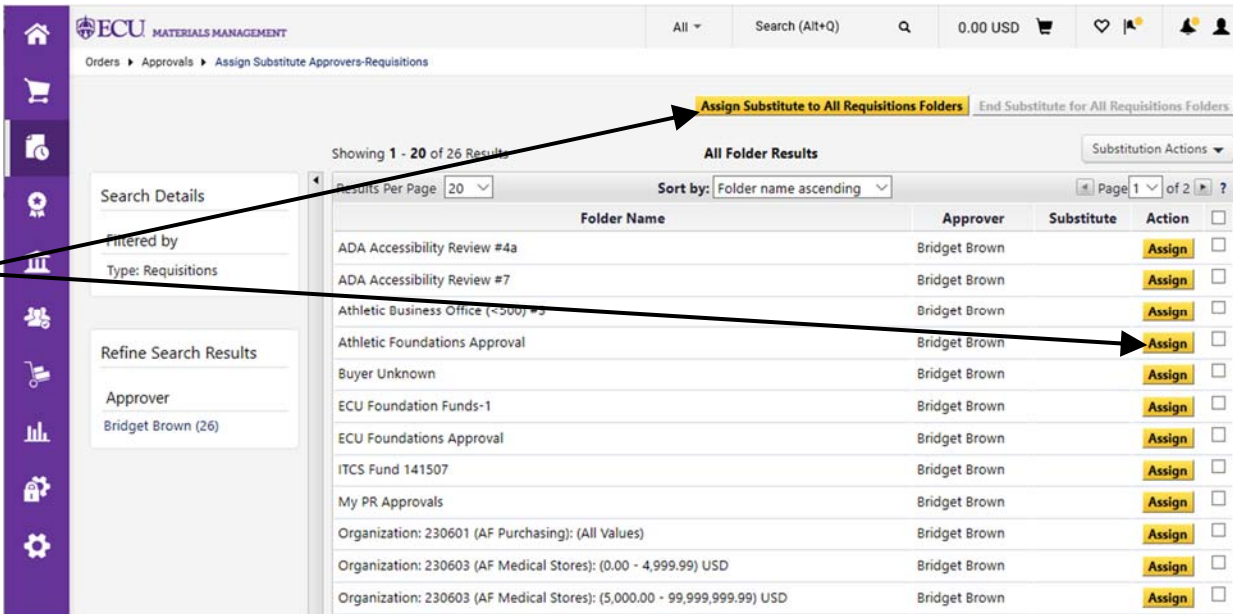
- 17. A **Success** message will display, and the requisition will continue through workflow. This completes the steps for the email approvals procedure.

APPROVALS – ASSIGN SUBSTITUTIONS FOR ALL FOLDERS

Last Updated on: 11/12/2021



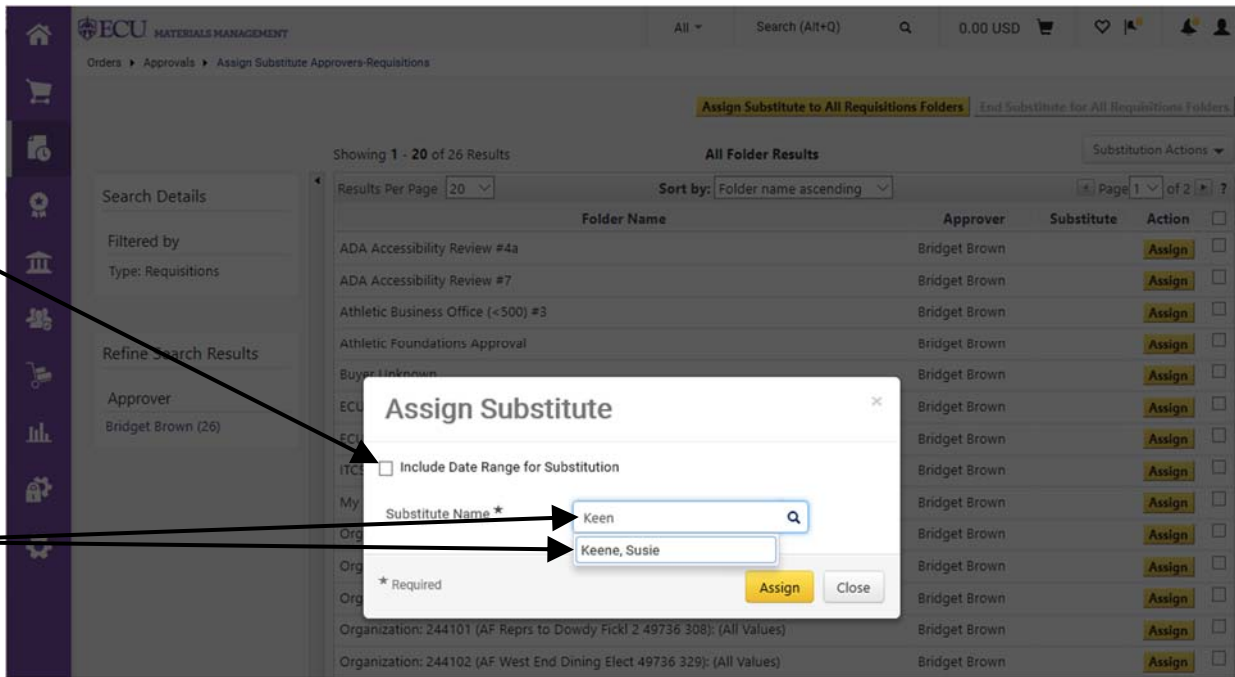
1. Click on the **Orders** icon, hover over **Approvals** and select **Assign Substitute Approvers-Requisitions** link.



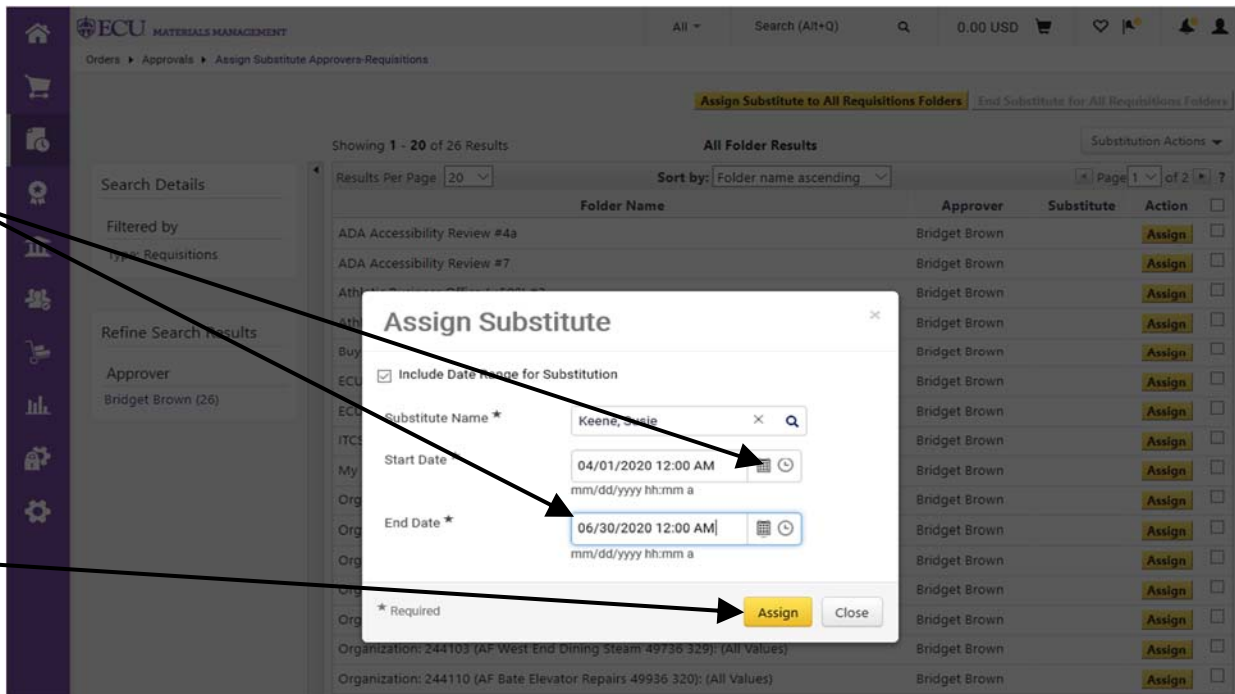
2. Click on **Assign Substitutes to all approval folders** button. **Note:** The same steps can be taken for individual approval folders by click on corresponding **Assign** button or check box.

APPROVALS – ASSIGN SUBSTITUTIONS FOR ALL FOLDERS

Last Updated on: 11/12/2021



3. Enter an active PORT approver's Last Name in **Substitute Name** field and select when name, username, and email address are displayed.
4. In this example, we click on **Include Date Range for Substitution** check box.



5. Select appropriate date and time for **Start Date** and **End Date** to indicate the length of time that you will assign a substitute approver.
6. Click on **Assign** button.
Note: If your substitute is already an approver for any of your folders, you will see the appropriate message in a pop-up window.

APPROVALS – ASSIGN SUBSTITUTIONS FOR ALL FOLDERS

Last Updated on: 11/12/2021

9.

8.

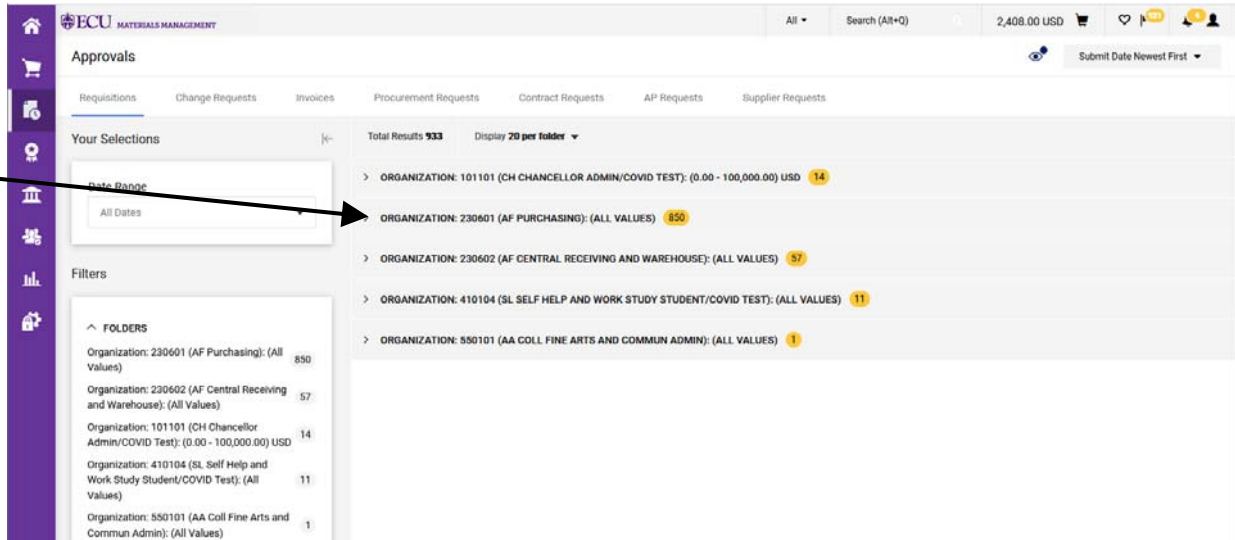
7.

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

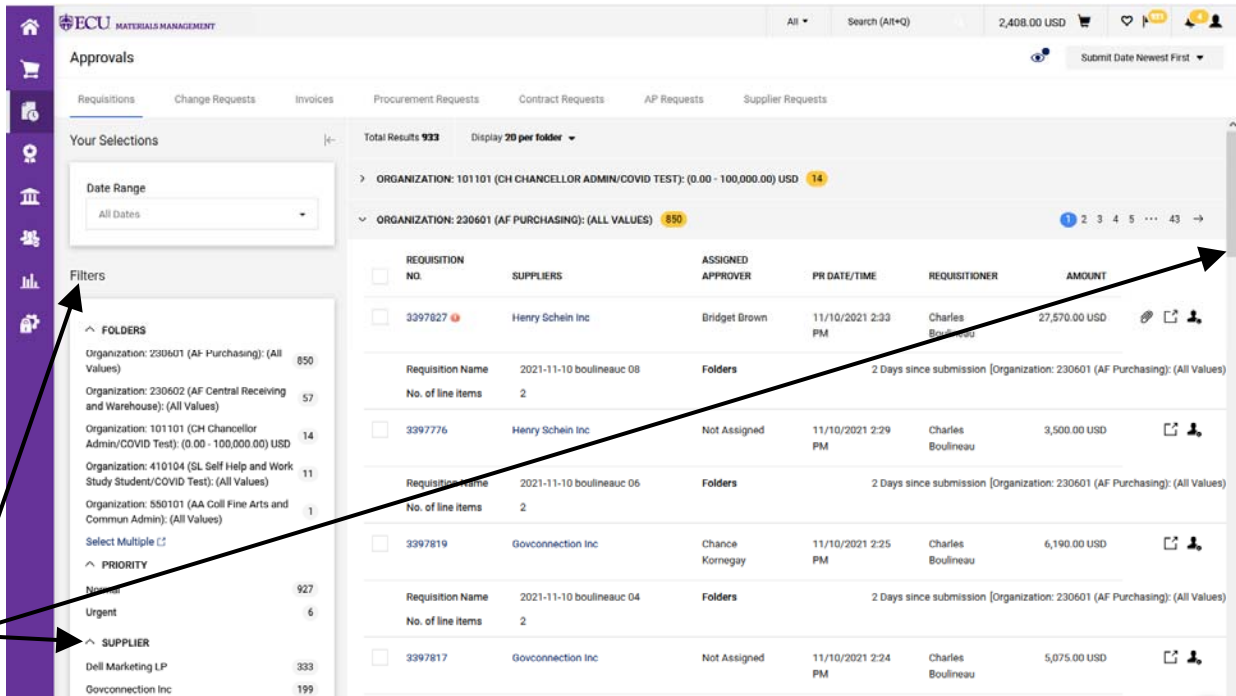
7. The **Substitute** will be listed as an approver for each approval folder.
8. If you need to end substitution for all approval folders earlier than date specified, click on **End Substitute for All Requisition Folders** button. In addition, you can end substitution early for individual approval folders by clicking on **Remove** button.
9. This completes steps for this procedure. Click on **ECU** icon to return to home page.

APPROVALS – FILTERS & SORTING

Last Updated on: 11/12/2021



1. Click one of the approval folders to view a listing of requisitions.



2. Note filters available for refining your searches in the approval folders: **Date Range, Priority, Supplier, Prepared by, Form Type, Custom Fields, Current Workflow Step, State, Department, Assigned Approver, Prepared For, Product Flags, Status Flags, and Supplier Class.** This will require scrolling to see remaining filters.

APPROVALS – FILTERS & SORTING

Last Updated on: 11/12/2021

Approvals

Requisitions | Change Requests | Invoices | Procurement Requests | Contract Requests | AP Requests | Supplier Requests

Select Multiple

^ PRIORITY

Normal 927

Urgent 6

^ SUPPLIER

Dell Marketing LP 333

Govconnection Inc 199

Henry Schein Inc 81

CDWG LLC 52

Life Technologies Corp 50

See all Supplier | Select Multiple

^ PREPARED BY

Charles Boulineau 726

Chance Kornegay 152

Bridget Brown 35

Bridget Brown 5

Joyce Carraway 4

See all Prepared By | Select Multiple

^ FORM TYPE

Non-Catalog Form 649

Purchase Request 24

Medical Supplies Special Orders 4

Total Results 933 Display 20 per folder

> ORGANIZATION: 101101 (CH CHANCELLOR ADMIN/COVID TEST): (0.00 - 100,000.00) USD 14

^ ORGANIZATION: 230601 (AF PURCHASING): (ALL VALUES) 850

REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUISITIONER	AMOUNT
<input type="checkbox"/> 3397827	Henry Schein Inc	Bridget Brown	11/10/2021 2:33 PM	Charles Boulineau	27,570.00 USD
Requisition Name 2021-11-10 boulineau:08		Folders	2 Days since submission [Organization: 230601 (AF Purchasing): (All Values)]		
No. of line items 2					
<input type="checkbox"/> 3397776	Henry Schein Inc	Not Assigned	11/10/2021 2:29 PM	Charles Boulineau	3,500.00 USD
Requisition Name 2021-11-10 boulineau:06		Folders	2 Days since submission [Organization: 230601 (AF Purchasing): (All Values)]		
No. of line items 2					
<input type="checkbox"/> 3397819	Govconnection Inc	Chance Kornegay	11/10/2021 2:25 PM	Charles Boulineau	6,190.00 USD
Requisition Name 2021-11-10 boulineau:04		Folders	2 Days since submission [Organization: 230601 (AF Purchasing): (All Values)]		
No. of line items 2					

3. For 1st filter, select **Non-Catalog Form** under **Form Type** filter.

Approvals

Requisitions | Change Requests | Invoices | Procurement Requests | Contract Requests | AP Requests | Supplier Requests

Date Range

All Dates

Form Type • Non-Catalog Form

Filters

^ FOLDERS

Organization: 230601 (AF Purchasing): (All Values) 593

Organization: 230602 (AF Central Receiving and Warehouse): (All Values) 54

Organization: 101101 (CH Chancellor Admin/COVID Test): (0.00 - 100,000.00) USD 1

Select Multiple

^ PRIORITY

Normal 643

Urgent 5

^ SUPPLIER

Dell Marketing LP 282

Govconnection Inc 151

Henry Schein Inc 53

Life Technologies Corp 49

CDWG LLC 31

See all Supplier | Select Multiple

Total Results 648 Display 20 per folder

> ORGANIZATION: 101101 (CH CHANCELLOR ADMIN/COVID TEST): (0.00 - 100,000.00) USD 1

^ ORGANIZATION: 230601 (AF PURCHASING): (ALL VALUES) 593

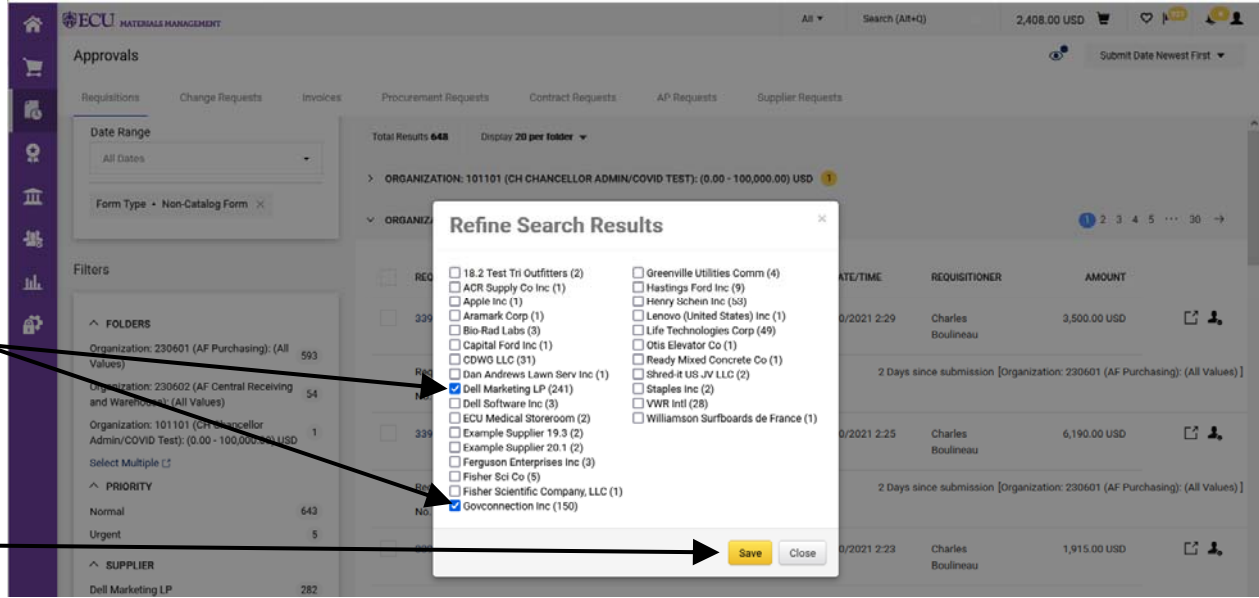
REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUISITIONER	AMOUNT
<input type="checkbox"/> 3397776	Henry Schein Inc	Not Assigned	11/10/2021 2:29 PM	Charles Boulineau	3,500.00 USD
Requisition Name 2021-11-10 boulineau:06		Folders	2 Days since submission [Organization: 230601 (AF Purchasing): (All Values)]		
No. of line items 2					
<input type="checkbox"/> 3397819	Govconnection Inc	Chance Kornegay	11/10/2021 2:25 PM	Charles Boulineau	6,190.00 USD
Requisition Name 2021-11-10 boulineau:04		Folders	2 Days since submission [Organization: 230601 (AF Purchasing): (All Values)]		
No. of line items 2					
<input type="checkbox"/> 3397815	Govconnection Inc	Not Assigned	11/10/2021 2:23 PM	Charles Boulineau	1,915.00 USD
Requisition Name 2021-11-10 boulineau:02		Folders	2 Days since submission [Organization: 230601 (AF Purchasing): (All Values)]		
No. of line items 2					
<input type="checkbox"/> 3374775	Henry Schein Inc	Not Assigned	10/26/2021 9:49 AM	Chance Kornegay	3,500.00 USD

4. Note that **Total Results Found** has been update based on filter.

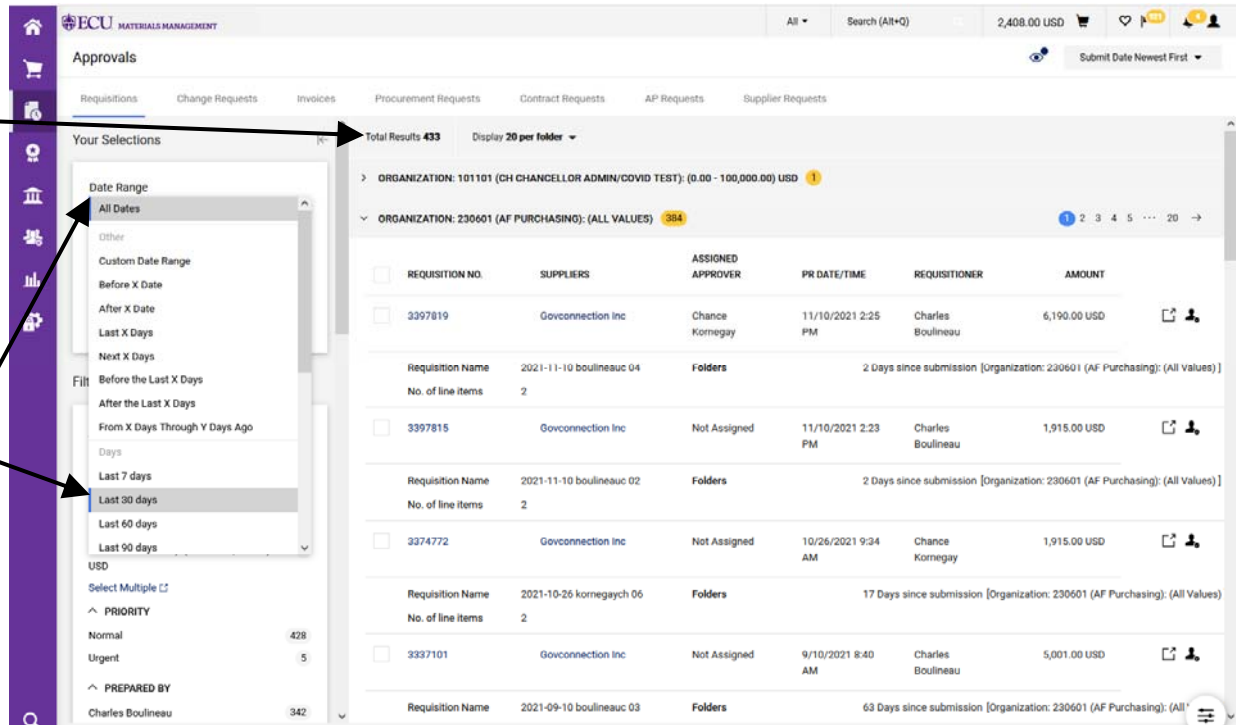
5. For the 2nd filter, click on **Select Multiple** link for **Supplier**.

APPROVALS – FILTERS & SORTING

Last Updated on: 11/12/2021



6. Select desired suppliers for filter. **Note:** This filter allows multiple selections.
7. Click **Save** button.



8. The **Total Results Found** field will update based on filter.
9. For last filter, click **Date Range** combo box and select an appropriate range.

APPROVALS – FILTERS & SORTING

Last Updated on: 11/12/2021

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 low to high**.

13. Notice the requisitions are now sorted from oldest to newest.

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