Prior to starting this process you should read all policies posted on the Business Services web pages located at

http://www.bloomfield.edu/resources/admin-services/policies-forms

including the Purchasing Policy at

http://www.bloomfield.edu/sites/default/files/common/Purchasing%20Policy_0.pdf
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LOGIN

Open a web browser using either

- Safari
- Internet Explorer (IE)
- Firefox

**Note:** Make sure your pop-up blocker is turned off on the browser you are using. Shopping from a punch-out catalog requires the ability to use pop-ups.

Enter [www.esmsolutions.com](http://www.esmsolutions.com) into the address bar.

Click the gold “Login” button located at the top right of the screen.

1. **Select: ESM - Mercury Version**

Enter the following:

- Bloomfield College Customer ID: 070030000
- Enter your User Name
- Enter your Password

Click Login button.
Message Screen

The grey area of the screen which states “easyPurchase – you have ...” is where messages from ESM will be conveyed to you.

Below are examples of the types of messages you would receive. Explanations of these messages will be handled in “Checkout Tab,” and “Additional Functionality of CHECKOUT TAB” section of this manual, and in the Approver Manual. By clicking on the underlined link you will be taken directly to the item that needs your attention.

- easyPurchase - you have...
  - 1 Returned Order/Req(s) to process - Checkout>Returned
  - 4 Pre-Encumbrance Maintenance Transaction(s) to process - Checkout>Maintenance Required
  - 3 Requisition Approve(s) to process - Approval>Summary
  - 1 Returned (Approved) Requisition(s) to process - Approval>Returned
Select the easyPurchase link located under Solutions on top left of page.

The Tabs
The tabs that you are able to view depend on your roll. If you are only a Requisitioner you will have access to the following Tabs: Shop, Cart and Receive.

If you are an Approver and Requisitioner you will have access to the following Tabs: Shop, Cart, Approve and Receive.

If you are only an Approver you will only have access to the Approve tab.
A. Punch-out Catalogs (e-Marketplace)

A Punch-out Catalog is a vendor hosted website created just for Bloomfield College with our negotiated pricing.

1. Select a Catalog from the supplier graphics by clicking on the graphic.

2. Locate items and enter the Quantity for each item you want to add to the cart and select the “Add to Cart” button.

**NOTE:** The experience you will have with each punch-out catalog is exactly like the on-line shopping experience you have today with any on-line vendor. Each vendor website is slightly different and each layout and shopping experience will be different. In common with all on-line merchants is the “add to cart” feature. (See sample below.)
3. When finished shopping click any one of the Checkout buttons.

4. Items are moved to e-Procurement.

Note that the CART tab has a numeral in brackets – cart (1). This indicates that a quantity of one item is being purchased. If in the example above a quantity of 2 cartons of paper was being ordered then the cart would read – cart (2).
5. Finish shopping

When you are finished adding items to your order move to the CART tab and follow the steps in CART TAB section below.
Non-Catalog Item

1. Click the non-catalog items link

Not everything is available through the punch-out catalogs. To purchase from a vendor who is not listed on the punch-out catalog list, a non-catalog item requisition needs to be created. Click the “non-catalog items” link.

2. Finding a vendor

You may not know exactly how the vendor name is written in the e-Procurement system so we recommend you only type in a few letters (three or more) of the vendor name to find your vendor. The few letters can be any part of the vendor name. Then click the “Go” button.

The system will find any vendor with that combination of letters. A list of vendors will appear. From there you can retrieve the vendor. Select the vendor you want to use by clicking on the vendor name.
The following screen will appear. If this is the correct vendor click the green “New Item” box.

3. Complete all required information

The items with the red * are required fields. Be as specific as possible so as to provide as much information to the vendor and your Approver. Remember, this is a contract to the supplier, so the more detail entered will allow the vendor to ship the correct item or provide the correct service plus if there is any problem with the order and Bloomfield College needs to go to court over the matter Bloomfield College will have more success if the description is succinct and accurate.

Add your UOM (Unit of Measurement). UOM is always a word such as but not limited to: each, package, box, carton, case, dozen, ream, lot, feet, inches, square feet, gallon, pint, liter, bag. It describes how the product you are purchasing is being sold.

Add the List Price. This is the cost of the item being purchased.

Add Quantity. This is the number of items based on UOM that you need.

Click “Add to Cart” button.
Click the “New Item” button to continue adding additional items to your order.

4. **Edit Button and Delete Button**

The Edit button allows you to make any additional changes to a particular line item (i.e. adjust description).

The Delete button allows you to delete a particular line item.

5. **Finish shopping**

When you are finished adding items to your order move to the CART tab and follow the steps in CART TAB section below.
CART TAB
The steps taken in CART apply to both Punch-out catalog requisitions and Non-Catalog Items requisitions.

1. **Click on CART tab.**

   You will notice that you have the ability to edit the Quantity or Delete the line item.

   ![CART Tab Panel]

   - **Quantity:** 1
   - **Total:** $27.00

   ![Cart Item Details]

   - **Catalog Item #:** P10X001-CTN
   - **Vendor:** OfficeMax (PunchOut)

2. **Adding additional items to your order.**

   At this point, if you need to go back to the same vendor and continue shopping you may do so by clicking on the SHOP tab and selecting the same punch-out vendor. Follow SHOP TAB steps 1-7 of this manual for Punch-out catalog items and steps 1-6 of this manual for Non-Catalog Items.
You will notice that the CART has (6) items and not two. This is because the e-procurement system adds the quantities together and not the line items.

3. **Changing Quantity of a Line Item**

If you change a quantity you will notice the blue “Update” button appear. Click Update to keep your change. If you do not click the Update button your change will NOT be saved.
4. Completing the CART tab

Once you are finished shopping and making changes, click the green Continue button (top or bottom). This will move your requisition into the Checkout Tab.
CHECKOUT TAB

Starting the Checkout process.
Items have moved to the Checkout Tab and assigned an Order/Req #. At this point you cannot add any additional items to your requisition, but you can still change the quantities of the existing items. If you need to add an item you can delete this requisition (see delete instructions below) and start over again in the SHOP Tab.

NOTE: These instructions will suggest you click the blue “Update” button each time you complete a step. You may complete all the steps in this section and then click one of the blue Update buttons, but it is recommended you update frequently so that information is not lost (much like saving your work in Word or Excel frequently in the event the program or your computer crashes).

Requisition consists of 3 parts: Header, Body and Footer.
Your requisition consists of 3 parts: Header, Body and Footer. Click on the tiny blue arrow to the left of the Order/Req # to view your entire Requisition and view the Header, Body and Footer.
**Need By Date**

You can enter your desired date of delivery in the “Need By Date” box. We cannot guarantee if a vendor will abide by your request but it doesn’t hurt to put in your desired delivery date. Find your date by selecting a month, year and date.
External Notes
Additional information that you need to convey to the vendor should be entered in the “External Notes.” “External Notes” are visible only to you, your approver(s), purchasing and the vendor. An “External Note” in the Header section is something that applies to your entire order. This is NOT the place to add additional line items.

Notes that you want in External Notes would be delivery instructions, such as the sample below. Other examples would be:

- Referencing a vendor quote: As per Quote #1234 dated 11/12/2013
- Referencing a verbal quote from a vendor (orders under $2,500 only): As per verbal quote from John Smith at the ABC Company on 11/12/2013.
- Referencing No Charge for Shipping: Pricing includes shipping and handling.

Click the blue “add” link next to External Note. Type your note and click the blue Update button located at the bottom of the External Note box.

You will note that the word next to External Note has changed from “add” to “edit.” If you need to adjust your note just click “edit” and follow the External Notes instructions again.

Click the other button located at the far left of your Header section.

Internal Notes
Add any “Internal Notes” that you want only your Approver and Purchasing to see by clicking on the blue “add” link next to “Internal Notes.” The Vendor will NOT see any notes typed into “Internal Notes.” Type in note and click the blue “Update” button located at the bottom of the “Internal Notes” box.
You will note that the word next to “Internal Note” has changed from “add” to “edit.” If you need to adjust your note or view it, just click “edit” and follow the “Internal Notes” instructions again.

Click the other button located at the far left of your Header section to save your work.

**Adding an Attachment**

All quotes and other pertinent information pertaining to your order must be attached. Only you, your Approver(s) and Purchasing will see the attachment. The attachment cannot be viewed by anyone else (i.e. vendor, accounts payable).

To add an attachment click the blue “add” link next to “Attachment.” The Attachment box opens.

Give your attachment a name. Then click the “Continue” button.
Click the “Browse” button to find the file on your computer.

Once you have found and attached your file, click the “Continue” button.

Click the “Attach” button.
You are brought back to this screen where you can continue attaching additional documents. If done, click the “Return” button.

Click **Update** to save your work.

You will note that the word next to “Attachment” has changed from “add” to “edit.”

**GL (general ledger) Account Number**

When typing in your GL Account number it must follow the format indicated above.

Click **Update** to save your work.

**Splitting Order between more than one GL Account Code**

If your purchase must be split between more than one GL Account Code it can be handled in two ways.

1. **Splitting Globally**

   From the Header section enter your first GL Account as indicated in step #7 above. Then click the blue “split” next to “GL Acct Code.”
The following screen appears. Type in the percentage to be applied to the GL Acct in the “% Split” box. Click the “Add An Account” box.
Another line appears. Enter in the next account number and the “% Split.”

Continue in this manner until you reach 100% and you receive the message “The accounts are fully allocated.”
Then click the “Close” button.

You will now see this in your “GL Acct Code” box:

Click to save your work.

The word “split” has now changed to the word “edit.” If you click the blue “edit” you can go back and make any adjustments or view the split.

b. Line Item Split

You may only want one line item changed or split. You can handle it this way.

Open the requisition to see the body (line items) by clicking the small blue arrow to the left of the Order/Req #. Type the appropriate account number in the “GL Acct Code” box. Click the blue “Update” button before proceeding to the next step.
If the line items need to be split further you can click the blue “split” link next to GL Acct Code and follow directions from step “a. Splitting Globally” above since the split box that will appear on your screen is identical to the split box that appears from the Header section.

Click [Update] to save your work.

**Approval Route**

If you have the phrase [Select One] in you “Approval Route” box with a dropdown arrow, you will need to select who will approve your Requisition. If you do not have this ability you can bypass this step since you are hard coded to an Approver.

Click on the route and it will populate in the “Approval Route” box.

Click [Update] to save your work.
Changing Quantity
The quantities of the line items can be changed (increased or decreased). Locate the line item that you want to change and in the quantity (Qty) box type in the new quantity.

Click [Update] to save your work.

Deleting an Item
A line item can be deleted by clicking the red “Delete” button.

A pop-up box appears. Click Yes.
Delivery Information and Shipping & Handling
In the Footer Section you have the ability to change delivery location and who the delivery is for. To select the building click the dropdown box next to “Ship To” and select the building. In the “Deliver To” box you can change the name of the person receiving the deliver and also indicate a room number.

It is important to always include Shipping and Handling (S&H) on your requisition. This is easily overlooked when requesting a quote from a vendor. Always ask the vendor to provide an estimated shipping and handling charge. Enter this amount in the S&H box. If the shipping and handling is no charge, provide this information in the External Notes box. (See External Notes above.)

![Delivery Information and Shipping & Handling screenshot]

Click **Update** to save your work.

Submitting requisition for approval
Once the blue “Update” button is clicked, the green “Submit” button becomes an active link.

Click the green “Submit” button to put your requisition into your approval queue.

![Submitting requisition for approval screenshot]

Status
Once the green “Submit” button is clicked, the e-Procurement system talks with Colleague/Datatel (Bloomfield College’s ERP system) to verify if you have (1) authority to purchase using the account numbers indicated on the requisition, and (2) if there is money available in that budget line.

You will see the “Status” change from **Unsubmitted** to **Pre-Encumbrance**.
If verification passes you will see the “Status” change to **In-Progress** and the “Next Approver” will change from **n/a** to **view**. (If the Status states **Maintenance Required** please refer to item #15 below.) Your requisition is now in your Approver’s queue. If you click the blue “view” you can see who needs to approve your requisition.

**NOTE: Approver Email Notification**

Email notifications are sent out every three hours (9:00, noon, 3:00 p.m., etc.) to Approvers and is an accumulation of any activity that needs the Approver’s attention. If the Approver has not logged into the e-Procurement system since their prior notification they will not receive any additional notifications until they log-in. For example, if a notification was emailed to an Approver at 9:00 a.m. today and they have not logged into e-Procurement they would not receive the noon email or any additional emails until they log-in.

Once the status moves to **Complete** (with **no** PO number indicated) you know that your Requisition has received all its approvals and is waiting in Purchasing to be processed.

**Status – Maintenance Required**

If your status states **Maintenance Required** you will need to take action to resolve the error before the requisition can flow through the e-Procurement system.
Click the blue “view” next to Multiple errors occurred to see the error message. The error messages are Colleague error messages (not e-Procurement error messages). In this case it is a GL account error. The account number in this example was entered incorrectly – the “1” is missing at the end of the account code. Click the “Close” box so that you can fix the error.

In order to fix this error you would type the -1 into the “GL Acct Code” box, click the blue “Update” button.

Once the blue “Update” button is clicked, the green “Submit” button becomes an active link. Click the green “Submit” button to re-send your requisition through the system.

There can be various reasons for an error message and each one needs to be handled accordingly. Once the error is resolved you will need to go back to your requisition and click the “Submit” button to move your requisition through the system.

- If you entered the GL Account correctly, then you may not have been given access rights to that GL Account in Colleague. This would be resolved with the Controller.
• An error message could occur due to lack of funding. This would be resolved with the Finance department.

Purchase Order Number

Once your requisition receives final Approval the requisition moves to Purchasing. A Purchase Order is created and this Purchase Order is faxed, emailed or sent via an XML transmission to the vendor. You can see when your requisition was turned into a PO and the PO number in the lower left corner of the Header section.

![Purchase Order Example]

Order/Req #: 1640
Order/Req Name: Mormando - Gourmet Dining Services
Create Date: 11/11/2013
Vendor: Gourmet Dining Services
Total Line Items: 1
Total Value: $997.20

PO #: 11395
PO Release Date: 11/11/2013 12:20:32 PM
**ADDITIONAL FUNCTIONALITY OF THE CHECKOUT TAB**

**Deleting a Requisition**

If you decide that the requisition needs to be deleted or if your Approver has returned a requisition to you to delete, follow these steps.

Open up your requisition by clicking on the tiny blue arrow to the left of the Order/Req # so that you can see all of your line items.

a. Click the “Delete” button next to first line item.

b. A pop-up box appears. Click “Yes.”

c. Continue with steps a. and b. until all line items are deleted.
Note: If you never submitted the requisition by clicking the green “Submit” button, then your deleted requisition will disappear from your Checkout Tab. But, if you did submit your requisition and your Approver returned the requisition to you to delete, then you will have a Status of “Deleted” and the requisition will remain in your Checkout Tab.

### Searching for a Previously Entered Requisition

The top section of Checkout provides search criteria. You can use one or any combination of search criteria fields.

- **Search Criteria Fields:**
  - **Search box:** allows you to search for a vendor. Just type in a few letters to locate all vendors with those letters in their name. Or if you know exact way the vendor name is indicated in e-Procurement you can search on the entire vendor name. Remember, any typo in the name will not provide you with any results.
  - **Status box:** allows you to narrow your search base on status criteria.
  - **Date Range:** from and to dates. You must indicate a date range for your search.
  - **Sort by box:** allows your information to be sorted in the manner that best suits your needs.
  - **Rows/pg box:** allows you to indicate how much information you want to see per page.

Once you have completed the search criteria fields click the gold Go button. Your information will be populated on the screen.

### Reports

The reports section of Checkout provides you with the ability to run a select number of reports. Read the description of the report to see what information will be returned to you. There are numerous reports that you can access from the various tabs. The report requests will be delivered to your online account or can be emailed as attachments.

1. Click the radio button next to the report of interest and click Submit.
Depending upon which report you choose you will need to populate different information on the next screen that pops up. Complete the Selection and Advanced Criteria information for the report. The criteria will vary depending upon the report selected. Instructions for the individual reports are included on the left in this page. When complete, click Next. For example if you select report number “101 Requisition” you will need to provide the Requisition number on the subsequent screen.

a. Follow the steps outlined on the left of this screen to complete this form.

b. Select the preferred delivery option and the format. Each report is different and may have one or a combination of the file formats listed. The following is a description of the types of report formats that may be available for request:
   - Adobe Acrobat Document (*.pdf) will open with Acrobat Reader
   - Rich Text File (*.rtf) will open with most word processing software like WordPad, Notepad, and Microsoft Word
   - Microsoft Excel File (*.xls) will allow you to manipulate the data returned by the report request

c. Select the delivery method.
   - Email.... will send the report as an email attachment
   - Online ... will generate the report and make it available online. A message will be sent to the email listed when the report has been successfully completed. To view online reports, click the Status button on the main Reports screen. To open, click the blue diskette in the Report Output column next to the report listing

d. Select compression method:
   - None ............ the report is delivered as the file selected (default)
   - Compress .................. will “zip” the file and must be opened with software that can open a *.zip file. Typically compression delivery is needed only with reports that are returning a large volume of information.
   - Compress and Encrypt with Password ...........the report requested will be inside a *.zip file. This file cannot be opened without a password. The password to open this file is the same password used to log into the system

e. Click Next to generate the report request.
Note: The average report request typically takes 2 to 3 minutes to complete. The larger volume of information that you request will increase the time it takes to complete, but should not take more than 15 to 20 minutes to complete. Click the Status button in the main reports screen to check the status.

f. When the report request is complete, the user will receive an email with the report as an attachment or an email notice that the report is available online. To open online delivery requests, click the Status button, and then click the blue diskette next to the report.

**Copy Button**
The yellow “Copy” button allows you to create a new requisition based on all the information indicated on the current requisition. The Copy capability can only be used if the prices indicated on the requisition have not changed.
Returned Requisitions from your Approvers

If a requisition is returned from your Approver the Status will change to Returned. You will also notice that the green “Submit” button has become accessible again.

The Approver must indicate a reason for the return. To view the reason you must open up the requisition so you can view the line items (body). To do so, click the small blue arrow to the left of the Order/Req #. In the sample below, line #1 shows a rejection note in the Internal Note. Click the blue “edit” next to “Internal Note” to view entire note.

A popup box will appear on your screen with the reject reason in red. You will need to act upon your Approvers reject reason. In this instance the Approver states that the item is not needed. To act upon this you will need to delete this requisition.
If the reject reason is for you to change the account number you will need to make the appropriate changes and then click the green “Submit” button to re-submit your order into the e-Procurement workflow.