


E-Procurement System Tutorial

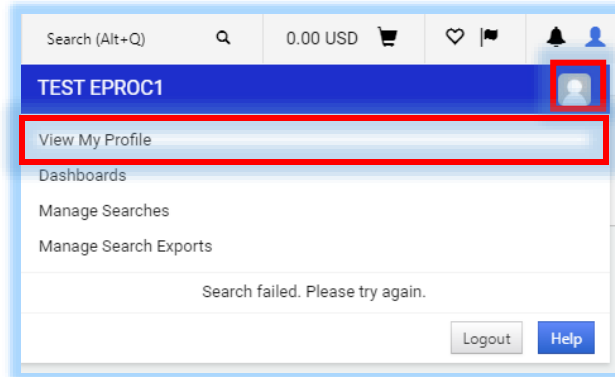
Verifying your Profile Information

Accessing E-Procurement

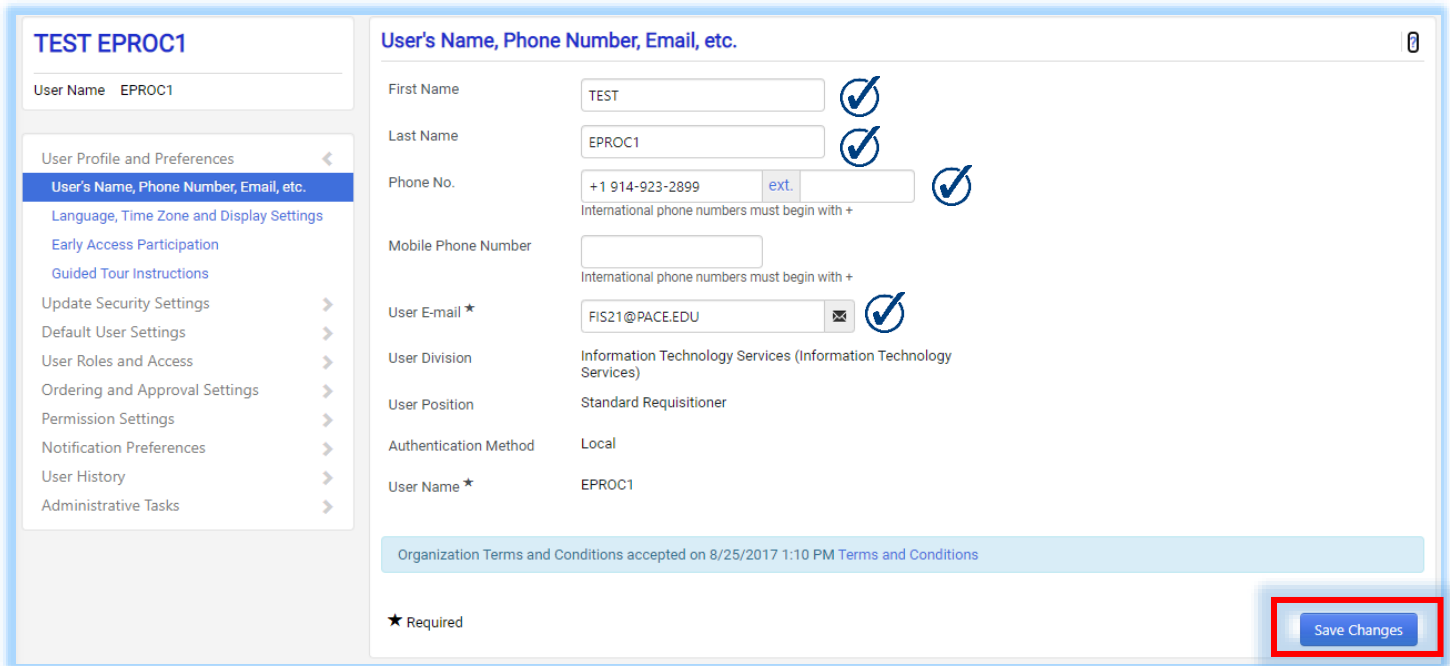
Log on to MyPace Portal, click the Staff tab and click E-Procurement.

Verifying User Profile – User Identification

Once logged in, Click the  icon → View My Profile (located in the upper right-hand corner of the screen.)

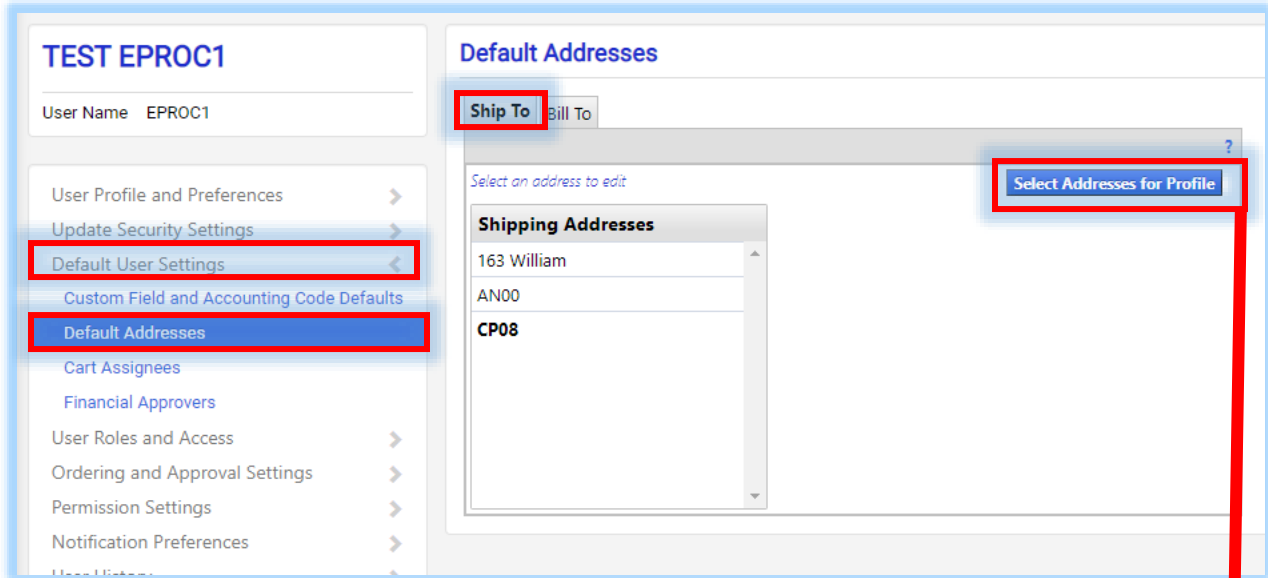


Verify that the information contained in the User's Name, Phone Number, Email, etc. section is correct. Make any necessary changes and click Save.

A screenshot of the 'User's Name, Phone Number, Email, etc.' profile page. The user is 'TEST EPROC1'. The page shows various fields for user information, each with a checkmark indicating it is correct. The fields are: First Name (TEST), Last Name (EPROC1), Phone No. (+1 914-923-2899), Mobile Phone Number (empty), User E-mail (FIS21@PACE.EDU), User Division (Information Technology Services (Information Technology Services)), User Position (Standard Requisitioner), Authentication Method (Local), and User Name (EPROC1). A 'Save Changes' button is highlighted with a red box at the bottom right. The page also shows a sidebar with navigation options and a footer with 'Organization Terms and Conditions accepted on 8/25/2017 1:10 PM Terms and Conditions'.

Verifying User Profile – Ship To Address

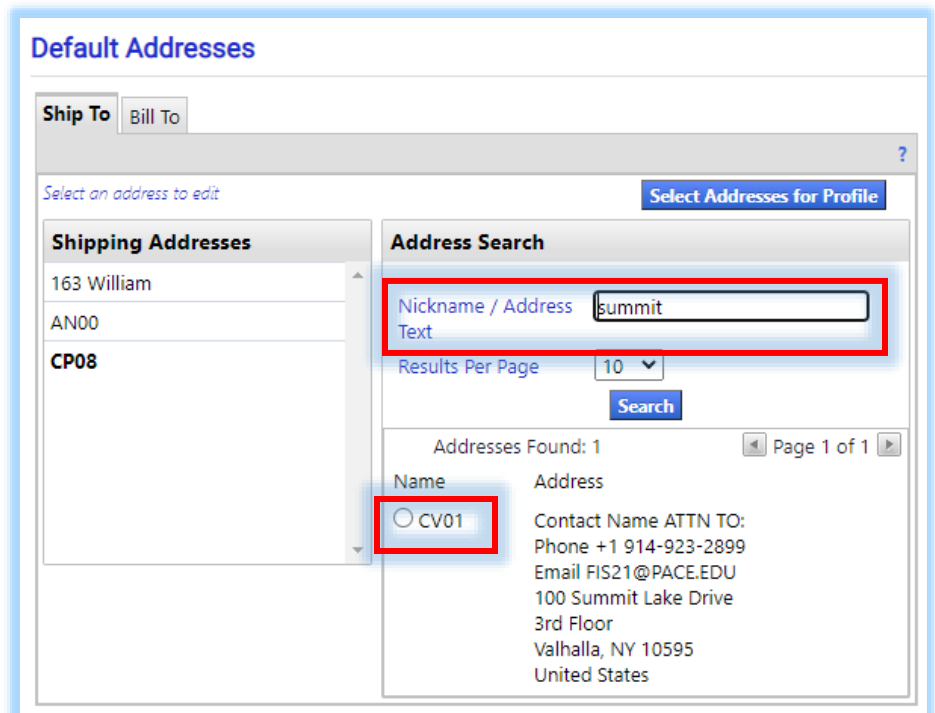
1. Click **Default User Settings**.
2. Click **Default Addresses**.
3. Click the **Ship To** tab



Click the **Ship To** tab to select the Ship To address.

Click the **Select Addresses for Profile** button, then enter keywords associated to that address in the **Nickname/Address Text** field and click on the **Search** button to search for that address.

Click the **radio button** to the left of the address you would like to add to your profile.



Default Addresses

Ship To | Bill To

Select an address to edit

Select Addresses for Profile | Delete Address

Shipping Addresses

- 163 William
- AN00
- CP08**

Edit Selected Address

Nickname: CN05

Default:

Current Default Address: CP08

ADDRESS

Attn: * ATTN TO: Test User

Room: * 1

Address 1: 156 William

Address 2: 156 William Street

Building: Building 156 WIL

City: New York

State/Province: NY

Postal Code: 10038

Country: United States

Save

- In the **Nickname** field, type the name to be given to this address. Otherwise, leave the code that populates.
 - Click the **Default** box if this is the address that is most frequently shipped to
-
- In the **Contact Name** field type the name of the person who the deliveries are sent to.
 - Enter the Room # if applicable.
 - Click Save to save changes

PLEASE NOTE: The user will see the Nickname appear to the left in the Shipping Addresses selection box.

To set the address as your **Default**, click on the nickname to the left and check the **Default** checkbox to the right. Then click **Save**.

Select an address to edit

Select Addresses for Profile | Delete Address

Shipping Addresses

- 163 William
- AN00
- CN05
- CP08**

Edit Selected Address

Nickname: 163 William

Default:

Current Default Address: CP08

ADDRESS

Attn: * ATTN TO:

Room: *

Address 1: 163 William

Address 2: 163 William Street

Building: Building 163 WIL

City: New York

State/Province: NY

Postal Code: 10038

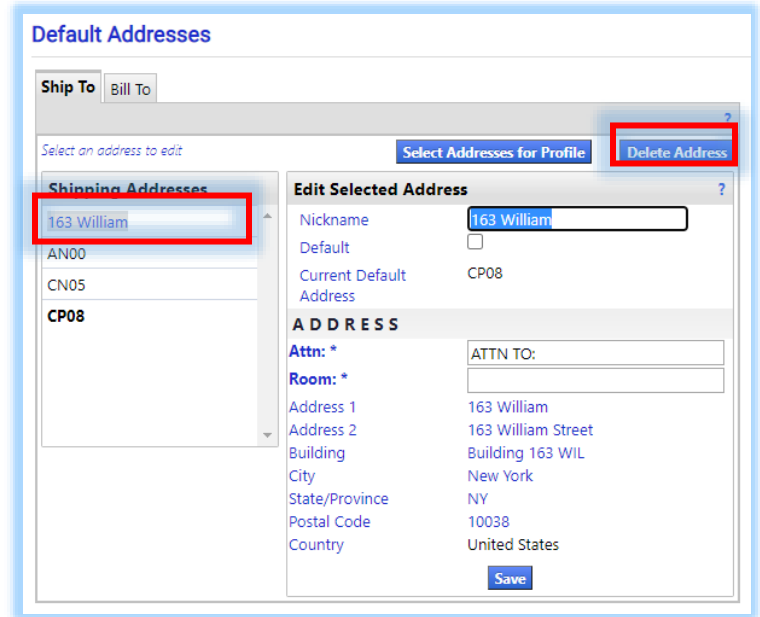
Country: United States

Save

If the user frequently processes orders for other individuals within their department, add additional addresses as required.

To add an additional **Shipping Address**, click **Select Addresses for Profile** and repeat previous steps. If this does not apply, continue to the next step.

If there is an address which needs to be deleted in the **Shipping Addresses**, select it from the left-hand side of the screen. Click **Delete Address**.

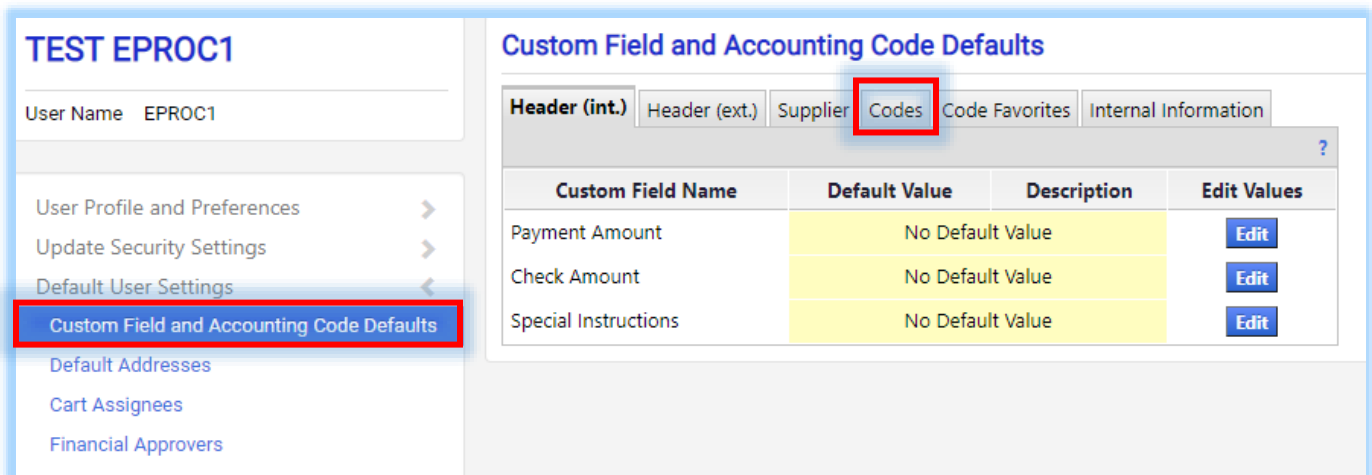


*****PLEASE NOTE:** The **Bill To** Address on the **Bill To** tab will always default to the Accounts Payable PO Box. It should NOT be updated. ***

Verifying User Profile – FOAPAL (Fund, Organization, Account, Program, Activity, Location) Values

This allows the user to verify that the accounting information contained in the E-Procurement System is correct.

1. Click the **Default User Settings** section
2. Click **Custom Field and Accounting Code Defaults** Section
3. Click the **Codes** tab



4. Then click on the **Edit** button in the **Index** row

Custom Field and Accounting Code Defaults

Header (int.) | Header (ext.) | Supplier | **Codes** | Code Favorites | Internal Information

Custom Field Name	Default Value	Description	Edit Values
Index	FA526	Purchasing & Contracts	Edit
Account	E19601	Supplies General Office	Edit
Commodity Code	615	Office Supplies, General	Edit
Chart	1	Pace University	Edit

5. Click **Create New Value**, enter the Index to be added in the **Value** field and click **Search**

Custom Field Name: Index, Default Value: FA526, Description: Purchasing & Contracts

Create New Value

Value	Description
FA040	Financial Information Systems (FIS)
FA526	Purchasing & Contracts

Search For Value

Field Name: Index

Value: [Empty]

Description: [Empty]

Results Per Page: 5

Search

6. Select the checkbox and click **Add Values** to add to profile

Results Per Page: 5

Values Found 1 Page 1 of 1

Select	Value	Description
<input checked="" type="checkbox"/>	FA046	TEST DEMO

Add Values **Back to Search**

- To set Index as **Default**, click on the Index from the left-and list and select the **Default** checkbox to the right. Then click **Save**

Edit Values [Close]

Create New Value

Value	Description
FA040	Financial Information Systems (FIS)
FA046	TEST DEMO
FA501	Sr VP for Finance &

* Custom Field Values marked

Edit Existing Value ?

Value: FA046

Description: TEST DEMO

Default:

Status: active

[Save] [Remove]

PLEASE NOTE: By defaulting a code you are noting this a code most frequently used. You can still edit the code at the Requisition step if charging to a different index.

- Click the **Codes** tab to return to the Custom Field and Accounting Code Defaults
- Click **Edit** to choose a default value for Account and Commodity Code (**PLEASE NOTE:** Chart should always be defaulted to "1-Pace University")

Custom Field Name	Default Value	Description	Edit Values
Account	No Default Value		[Edit]

Edit Values [Close]

Create New Value

Value	Description
E18201	Advertising Magazine
E18413	Print Promo Mailing Lists
E19001	Supplies Instructional and Lab
E19201	Supplies Computer Accessories

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

Results Values Found Page 1 of 1 ?

Select Value Description

E19602 Supplies General Office

[Add Values] [Back to Search]

Custom Field Name	Default Value	Description	Edit Values
Commodity Code	615	Office Supplies, General	[Edit]

Edit Values [Close]

Create New Value

Value	Description
050	Art Equipment And Supplies
075	Automotive Shop Equipment And Supplies
095	Barber And Beauty Shop

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

Results Values Found Page 1 of 1 ?

Select Value Description

655 Photographic Equipment And Supplies (Not Including)

[Add Values] [Back to Search]

In both screens (**Account** and **Commodity Code**) choose a default value from the available list, click the **Default** check box, and then click **Save**.