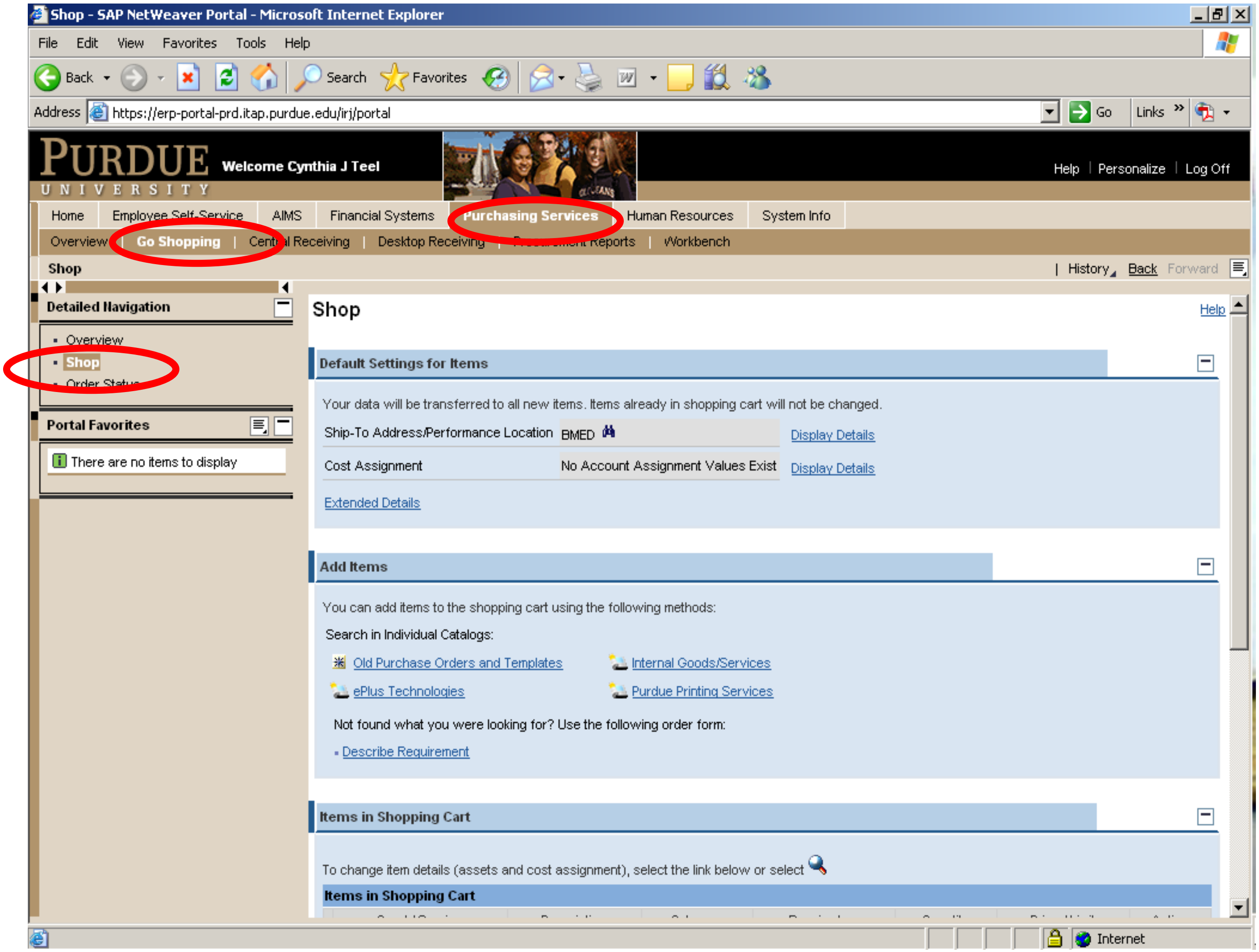
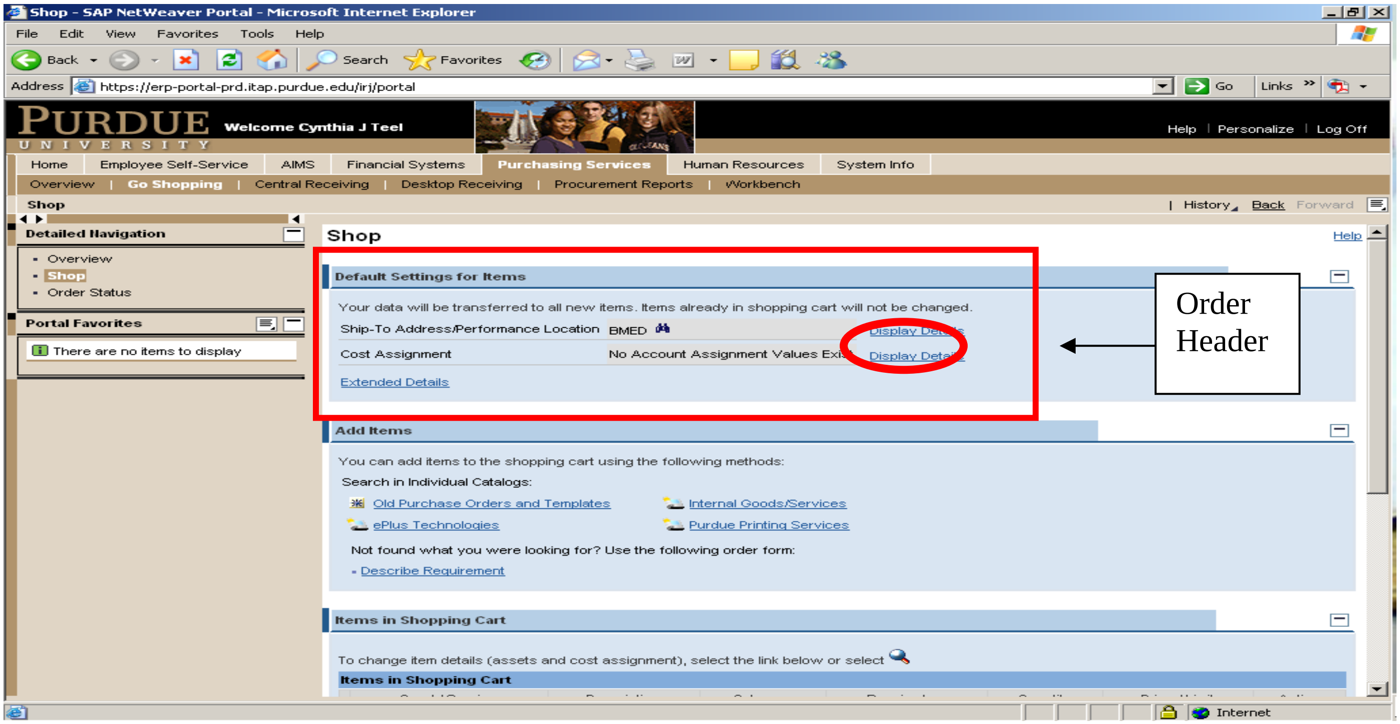
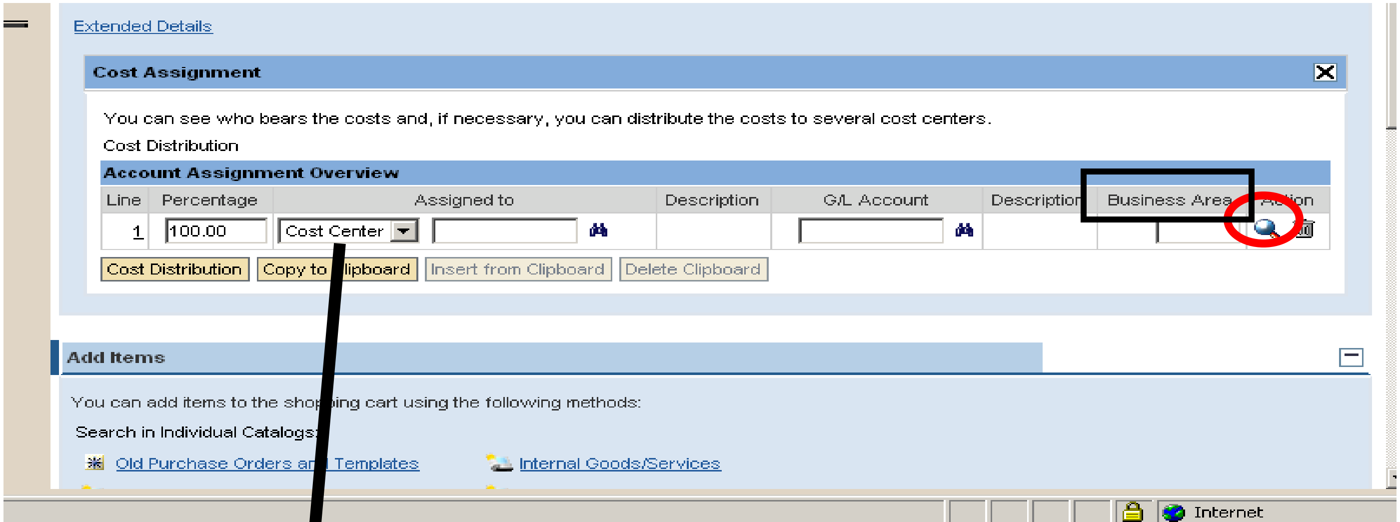
Screenshot examples for placing a Describe Requirement order



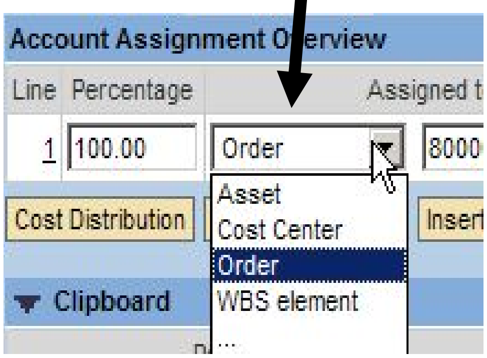
Once logged-in, go to the Purchasing Services tab, select Go Shopping, select Shop



In the header, click on Display Details for the Cost Assignment

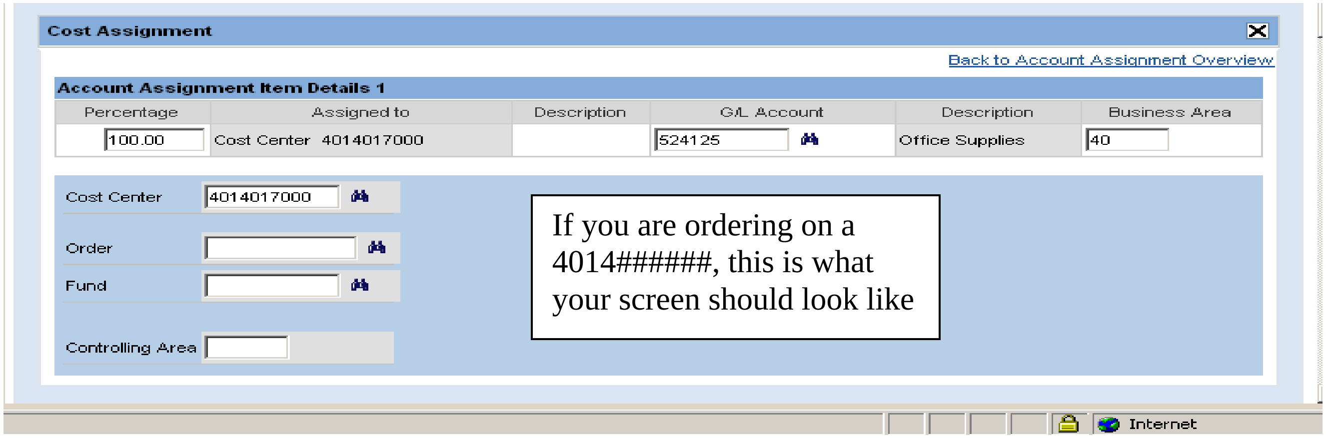


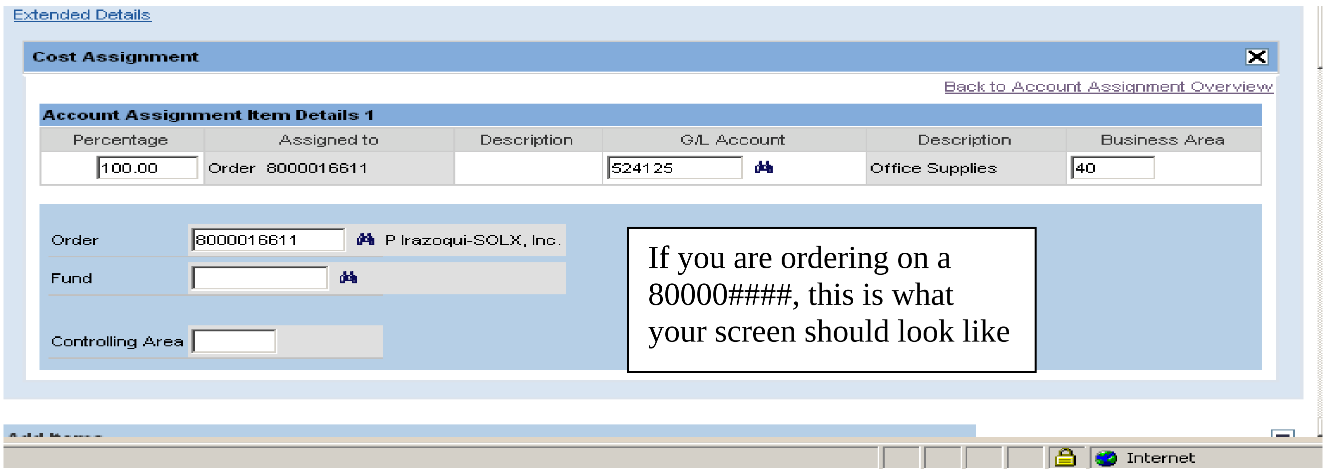
Enter the appropriate account information here. Once the header information is filled in, the accounts will default to each line item on this order.



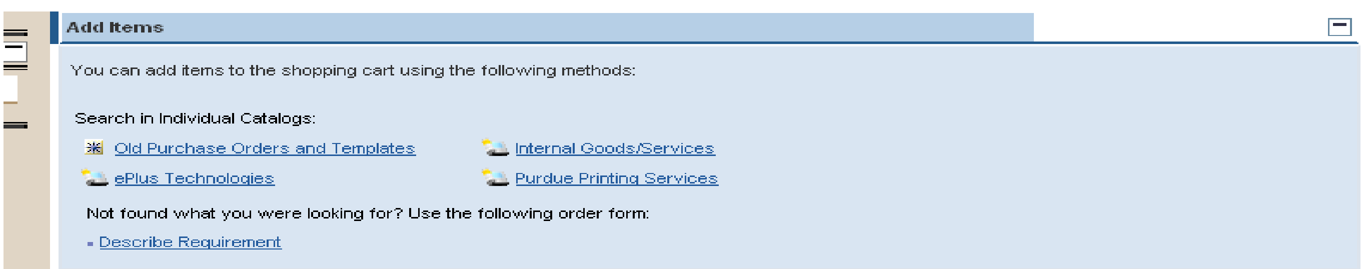
When you order from an account that starts with **80000####**, you must change the cost center to **order** in the cost assignment pull down box. When you order from an account that starts with 4014009###, you can leave the cost assignment box alone since it defaults to cost center.

After entering the Order number or Cost Center number, tab over to the Business Area and enter 40. Then click on the magnifying glass.

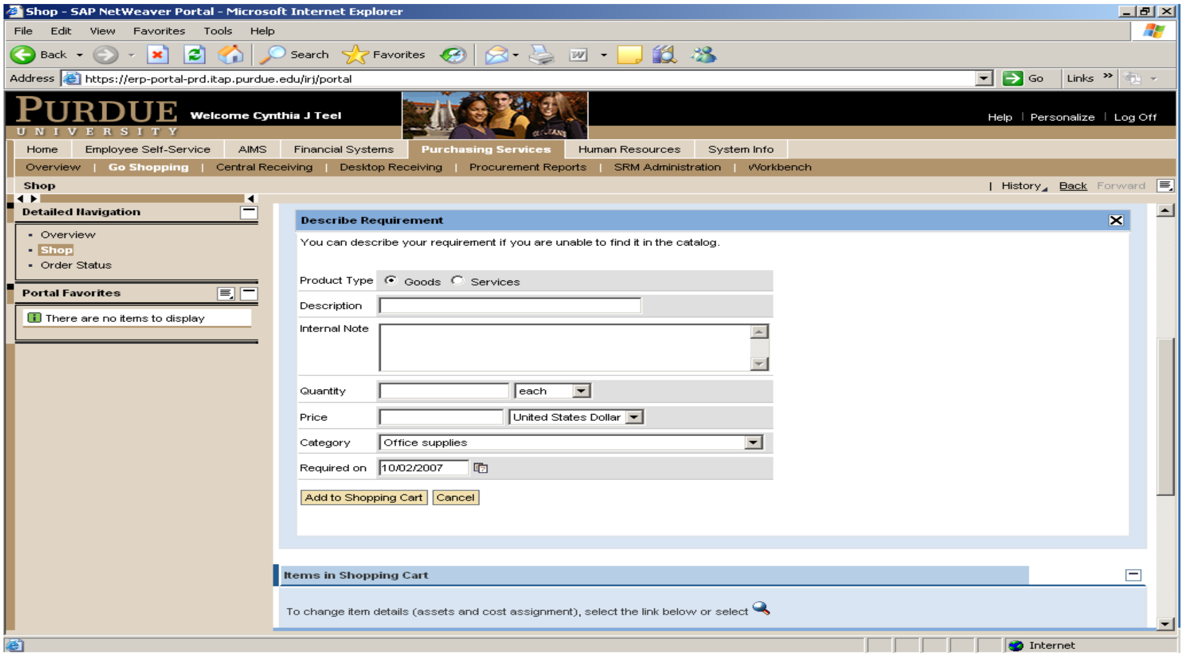




Enter the Fund number then scroll down to "add items"

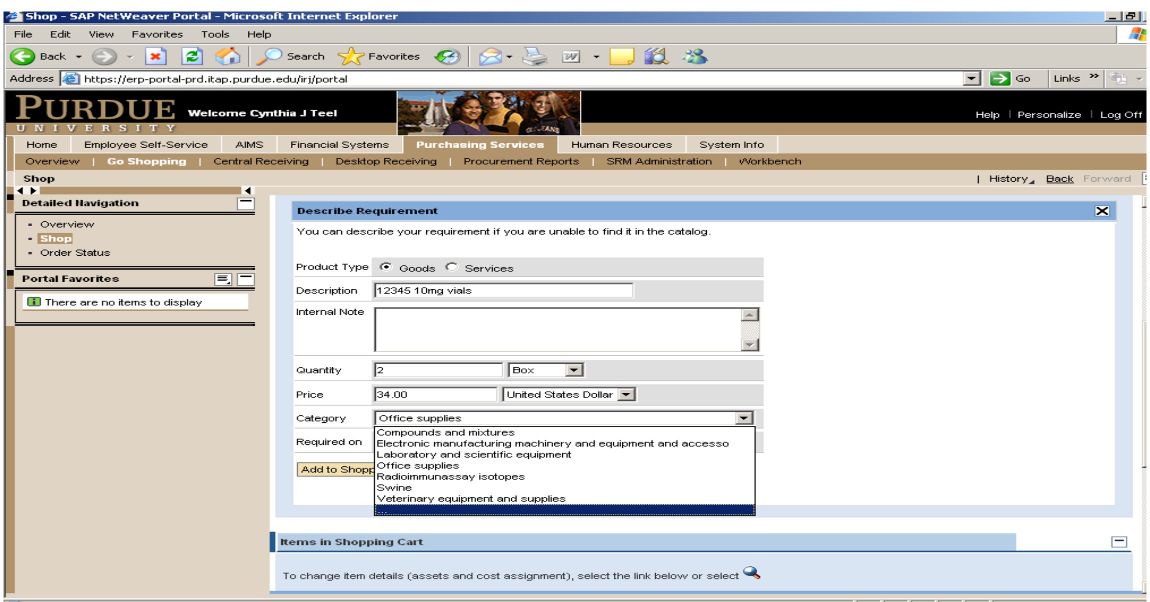


Click on Describe Requirement

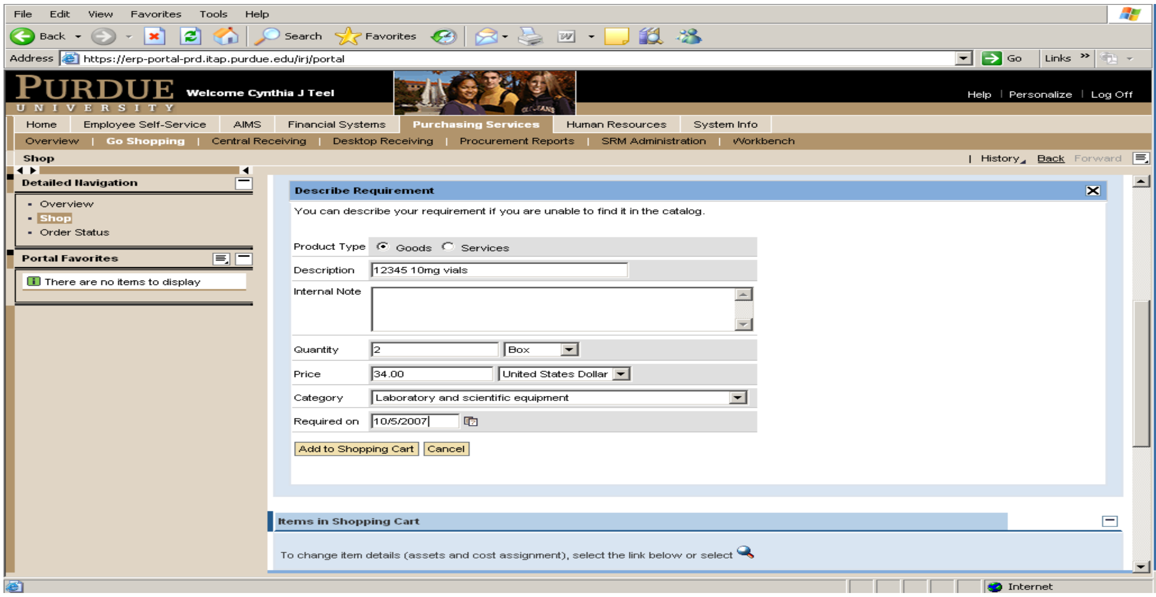


In the Description field, put a brief description of the product.

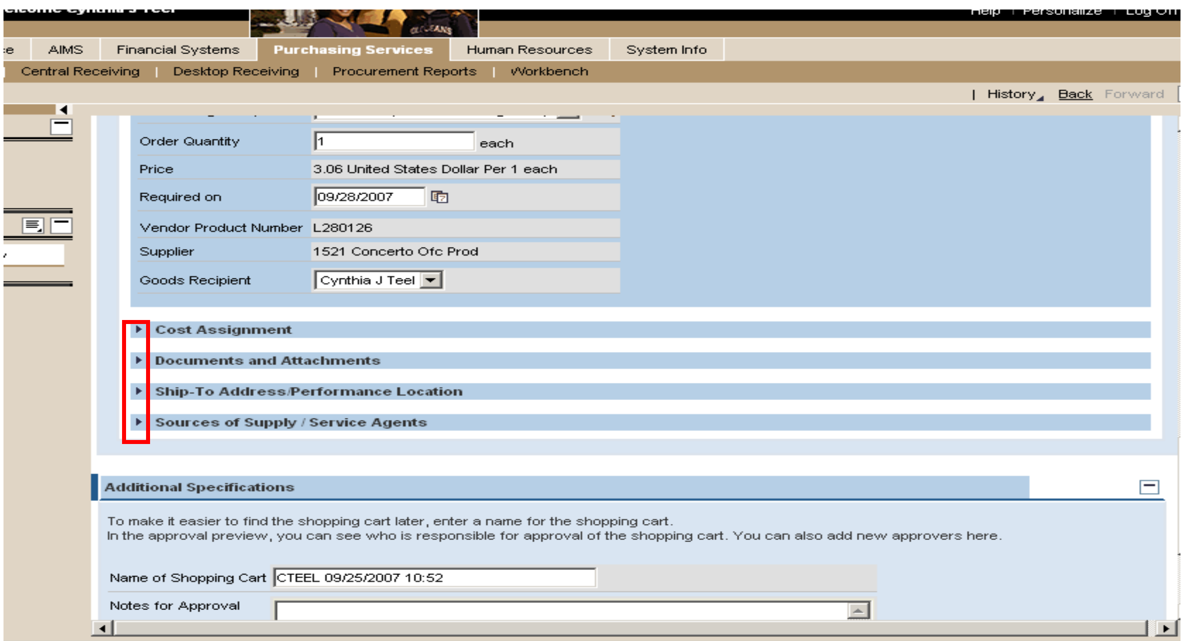
Enter the quantity, unit of measurement, and price.



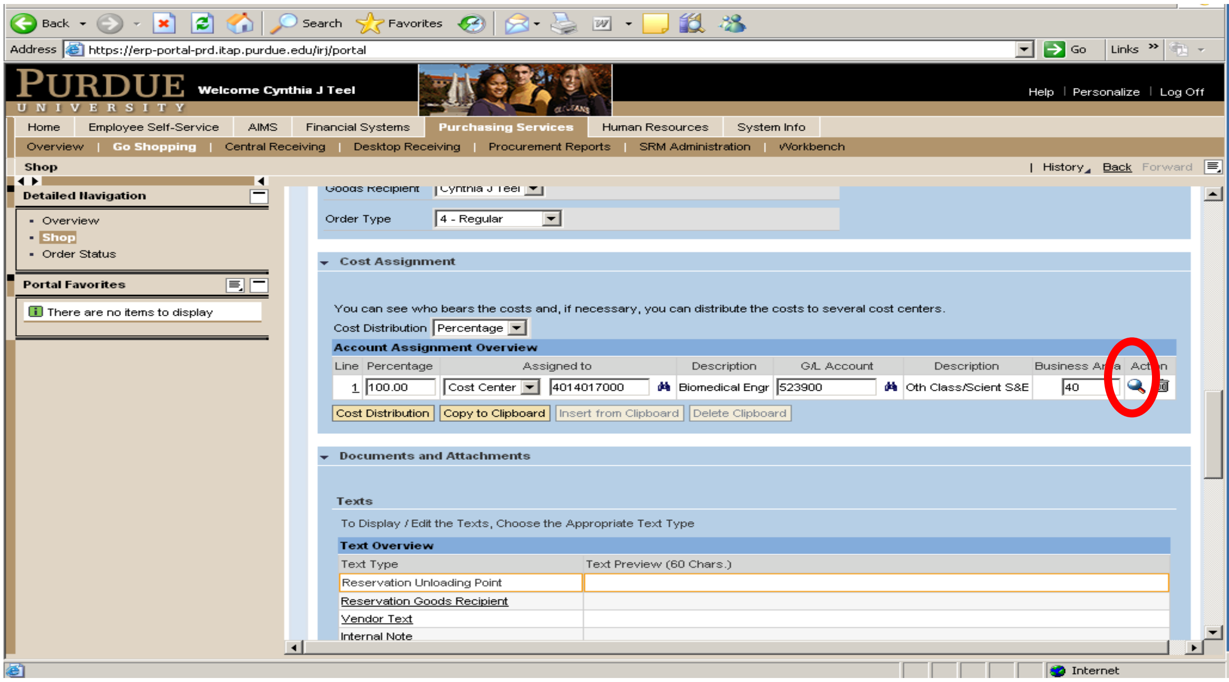
Select a Category by using the drop down box.



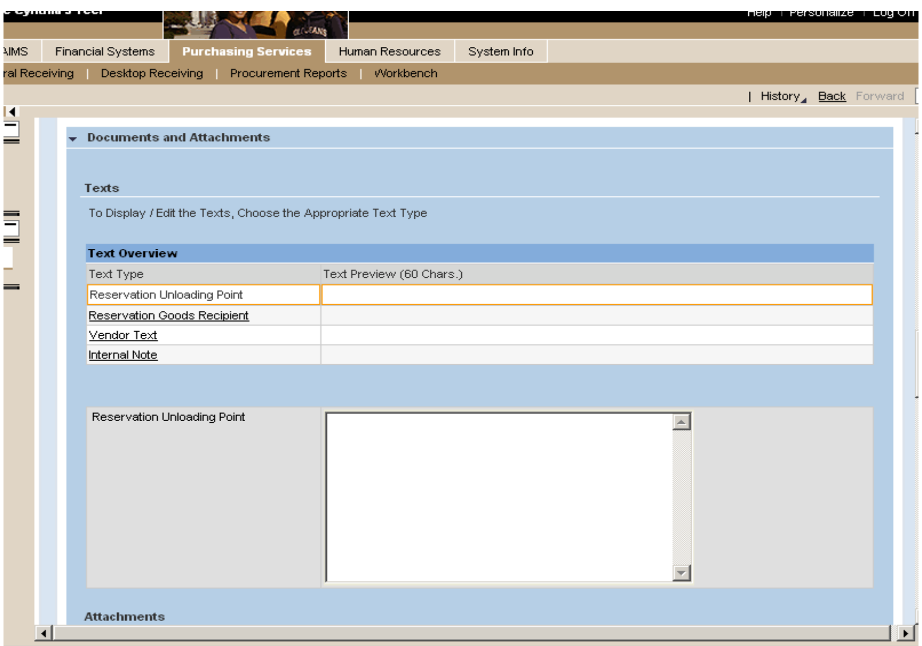
Click on Add to Shopping Cart



Open each of the arrows for Cost Assignment, Documents and Attachments, Ship to Address, and Source of Supply by clicking on each arrow



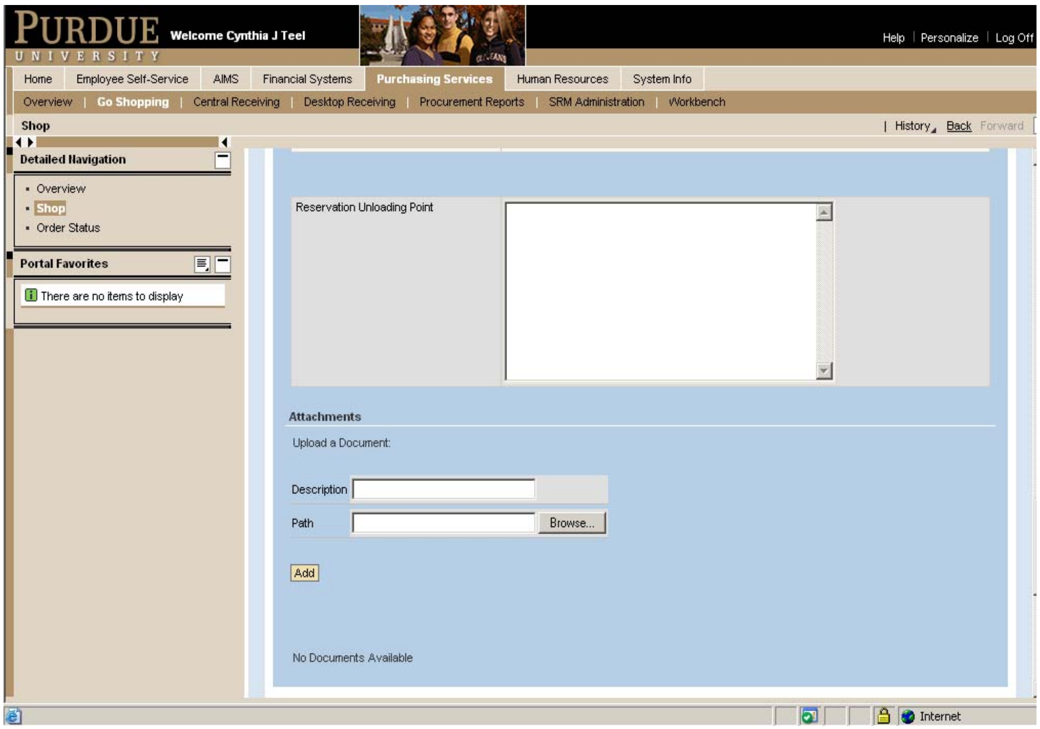
Double check the Cost Assignment. Click on the magnifying glass to check the fund number. Many times, the G/L account will change.



Scroll down to Documents and Attachments. Click on the Vendor Text field and enter the catalog number and any information for the vendor such as a quote number or if you need the order to be expedited.

The internal note field is a field for any special instructions you have for the purchasing group.

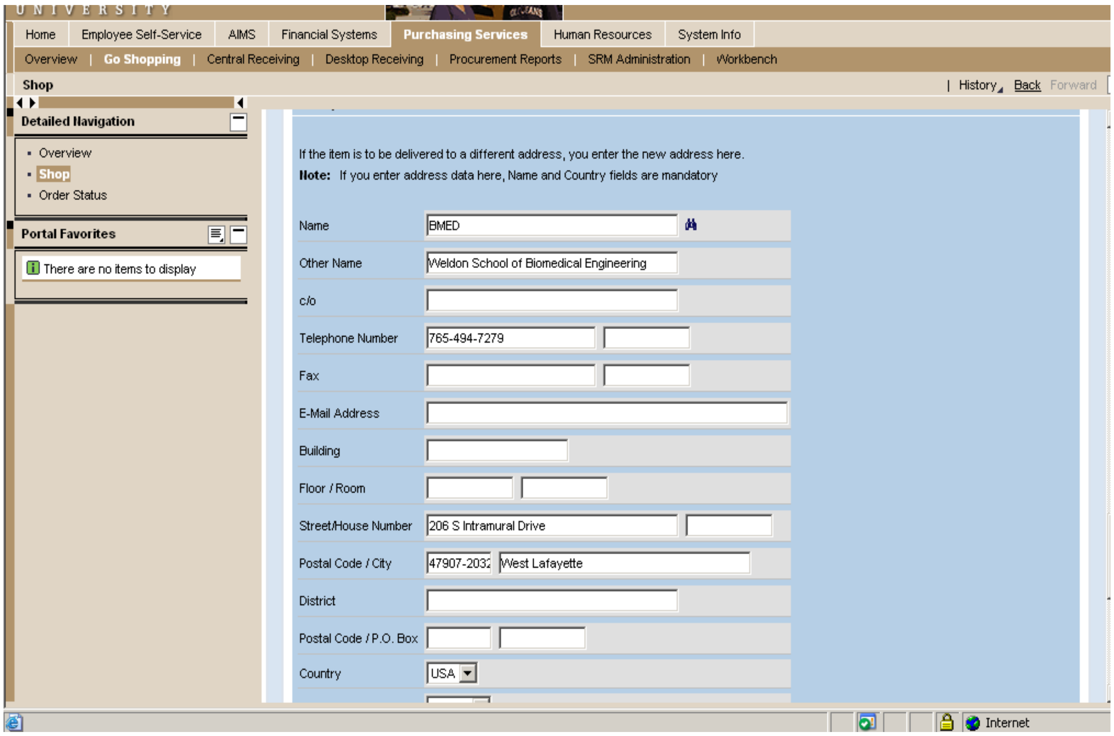
You will be able to tell which field you are in by the yellow box surrounding the field you are in.



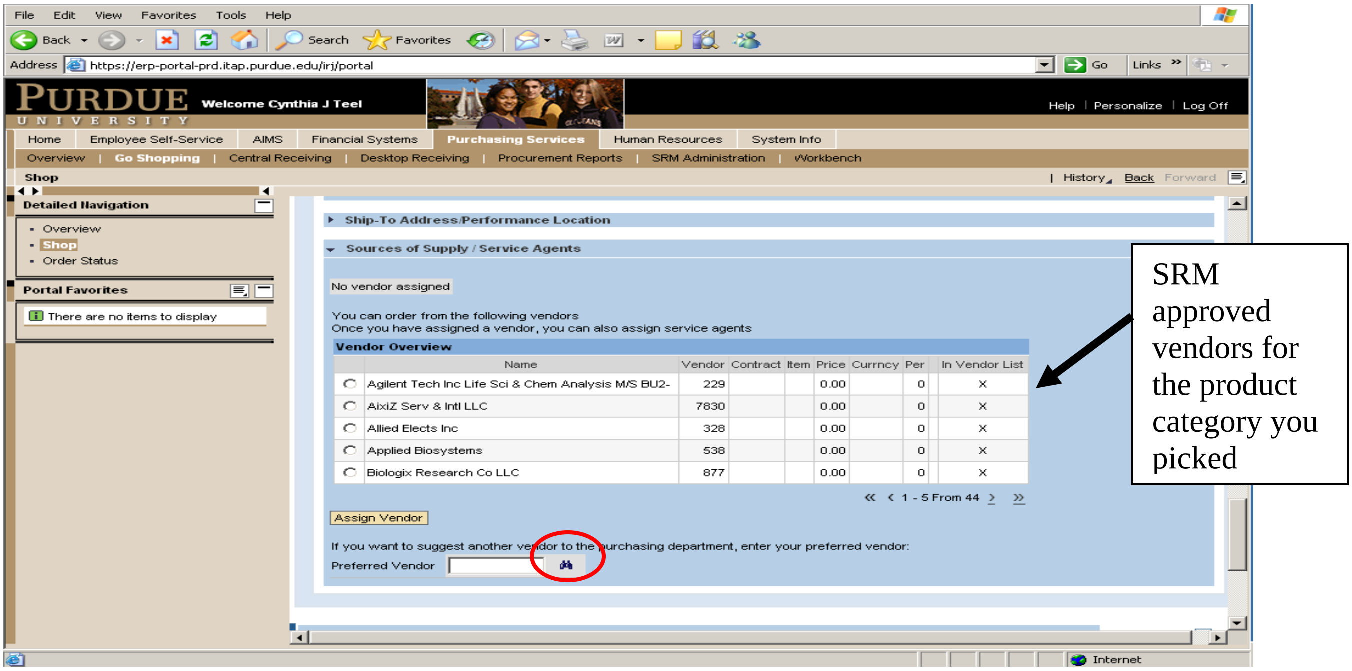
Scroll down to the Attachments section. This is where you will add any quotes, SRM New Supplier Requests, or any other documents that need to be attached pertaining to the order.

To add an attachment, click on Browse. Choose the file and click open. This will add the file to the Path field. Put a description in the description field. For example, if it is a quote, the description should be quote. Then click Add.

If the information only needs to be seen by Purdue personnel (such as a New Supplier Request) click the box labeled Inter.

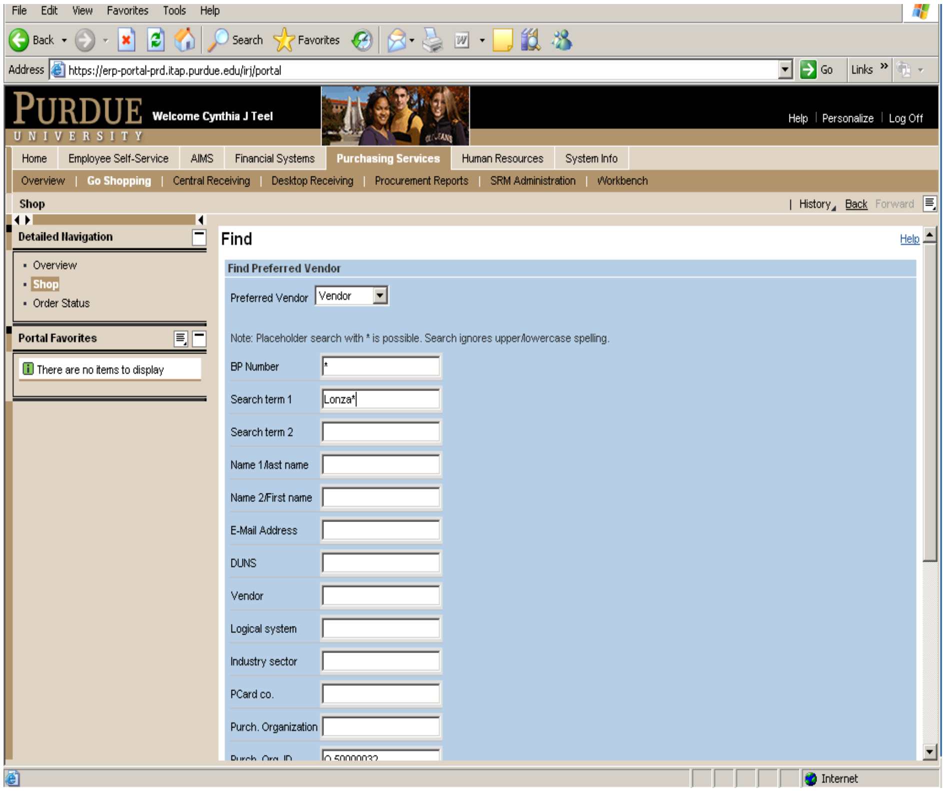


Scroll down to the Ship to Address information and double check the location for delivery



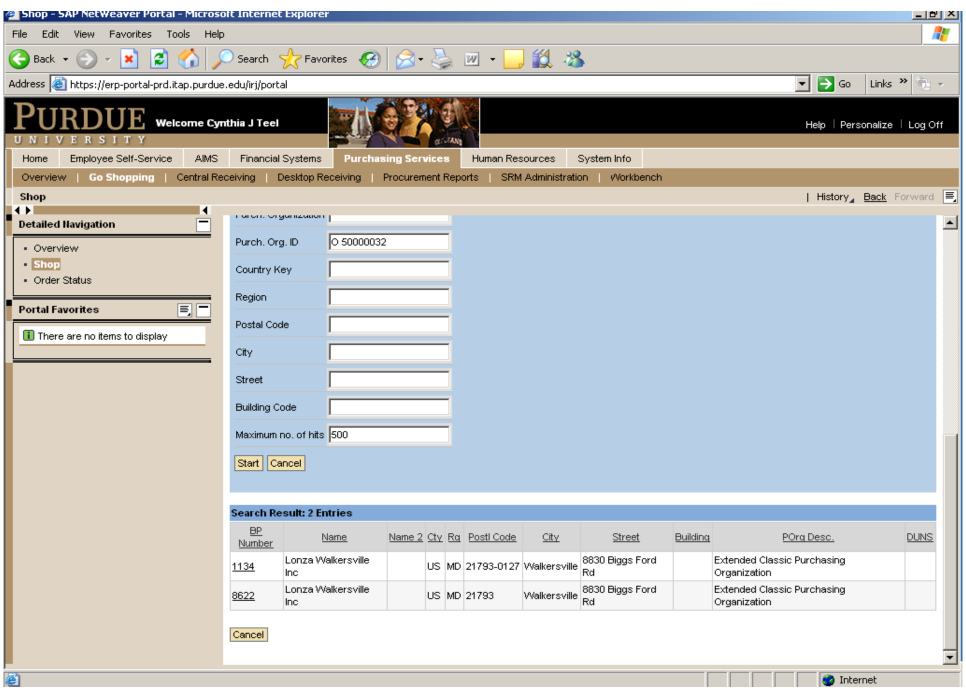
In the Sources of Supply, you need to pick a vendor.

If the Vendor is not listed in the Vendor Overview box, you must assign the vendor. To assign the preferred vendor, click on the binoculars.

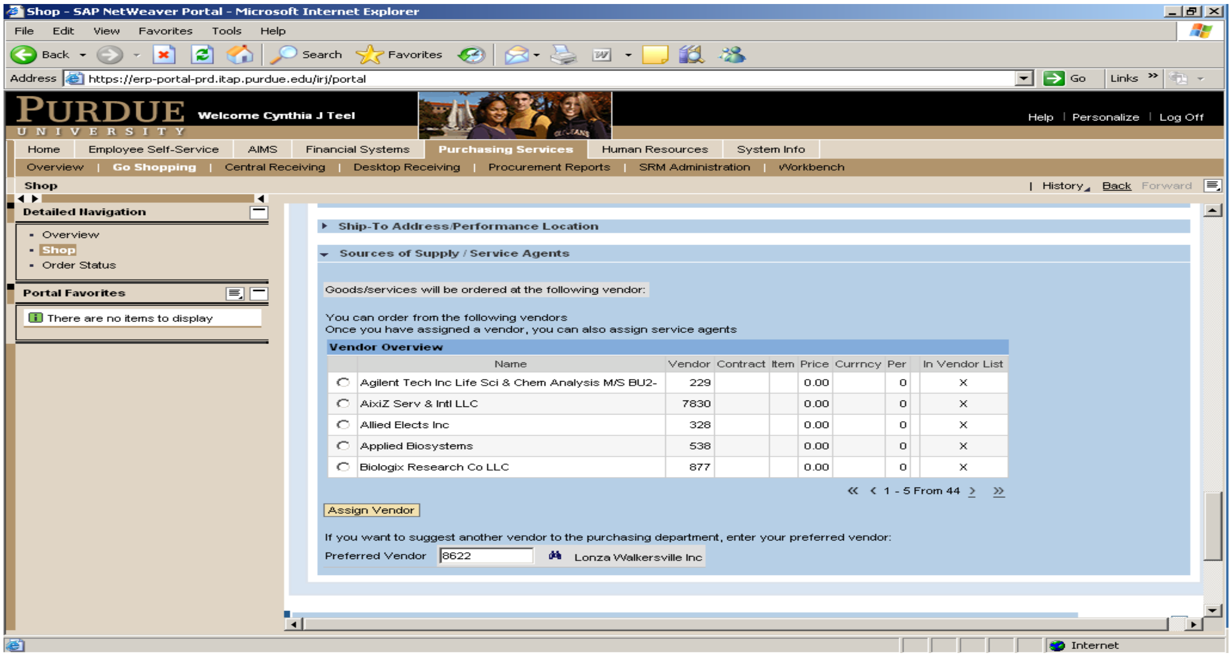


Enter the vendor you prefer in Search Term 1 box followed by an asterisk.

Scroll down and click start

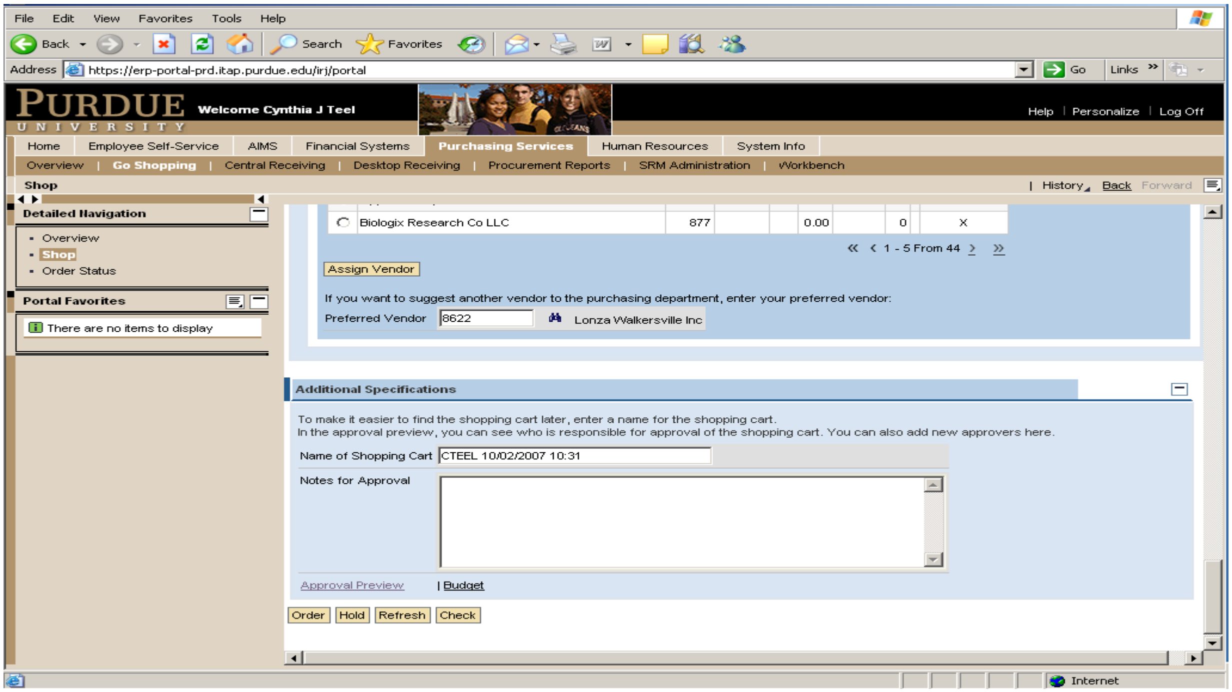


Click on the BP number for the vendor you are choosing



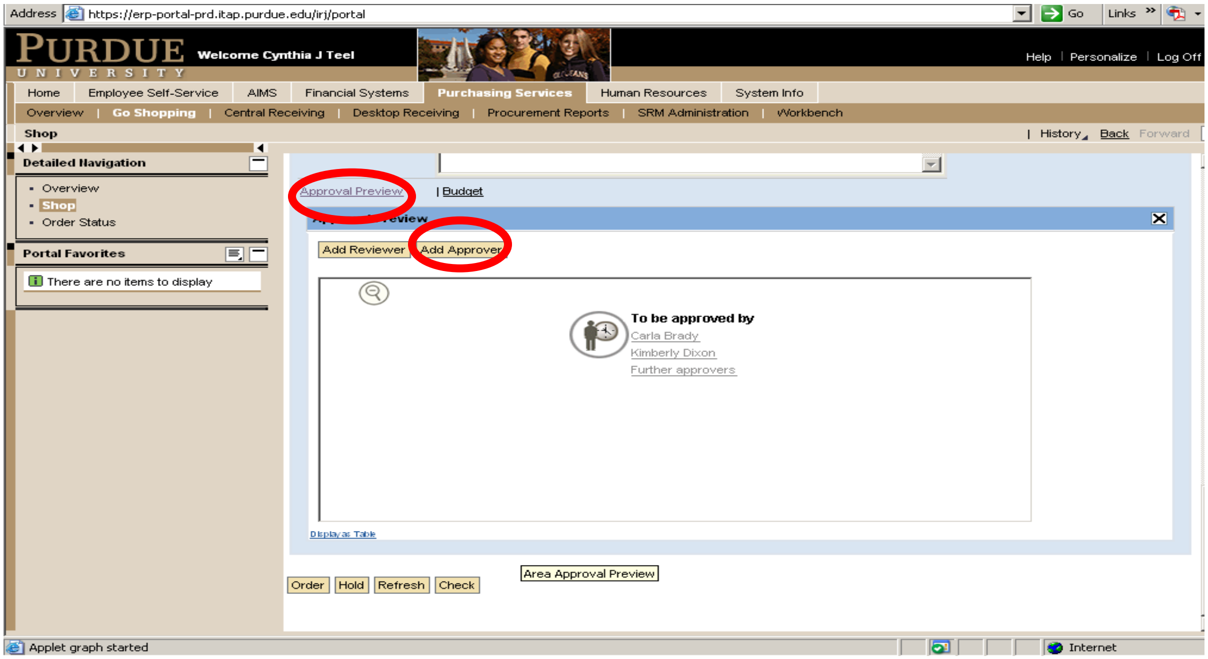
After you have clicked on the BP number, it will bring you to the screen above. Notice in the Preferred Vendor box, it has chosen our vendor.

If you have multiple line items, you must pick a vendor on every line.

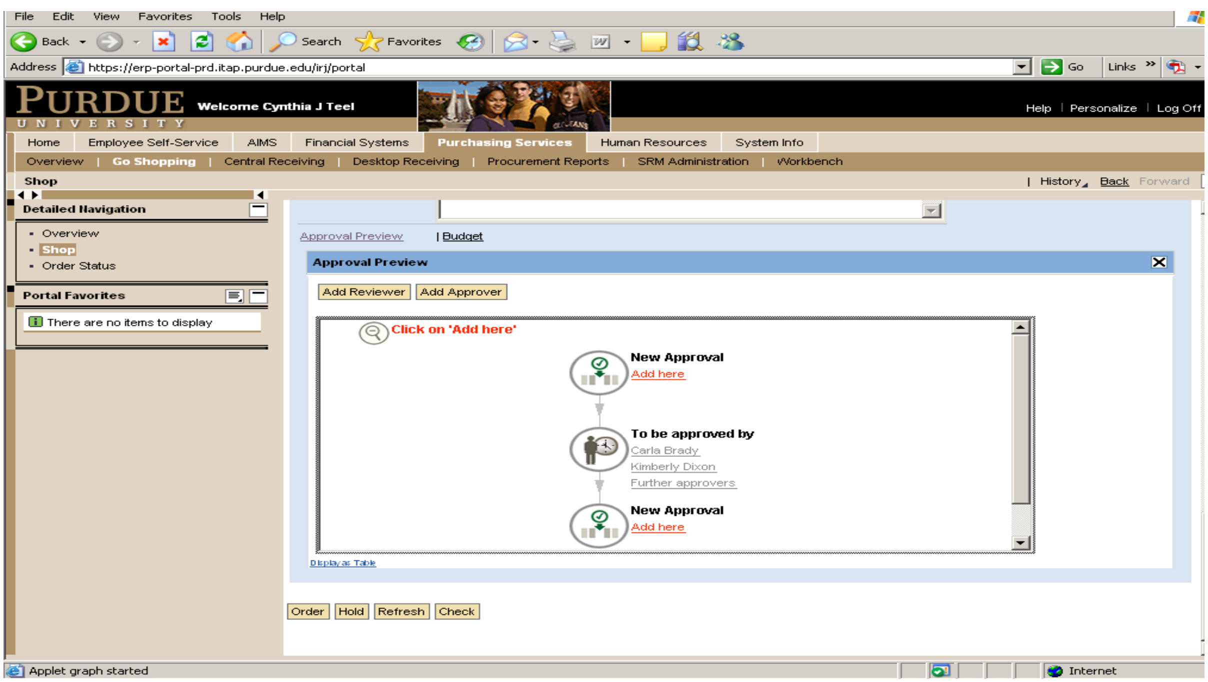


In the Additional Specifications box, Name your shopping cart.
Always start you shopping cart name with the shortened number abbreviation for your department, then the PI/requestor, your initials, then the Vendor, and a brief description if possible.
For example, if you ordered vials from Lonza, the shopping cart name would be: 41409/Wodicka/CT/Lonza/Vials

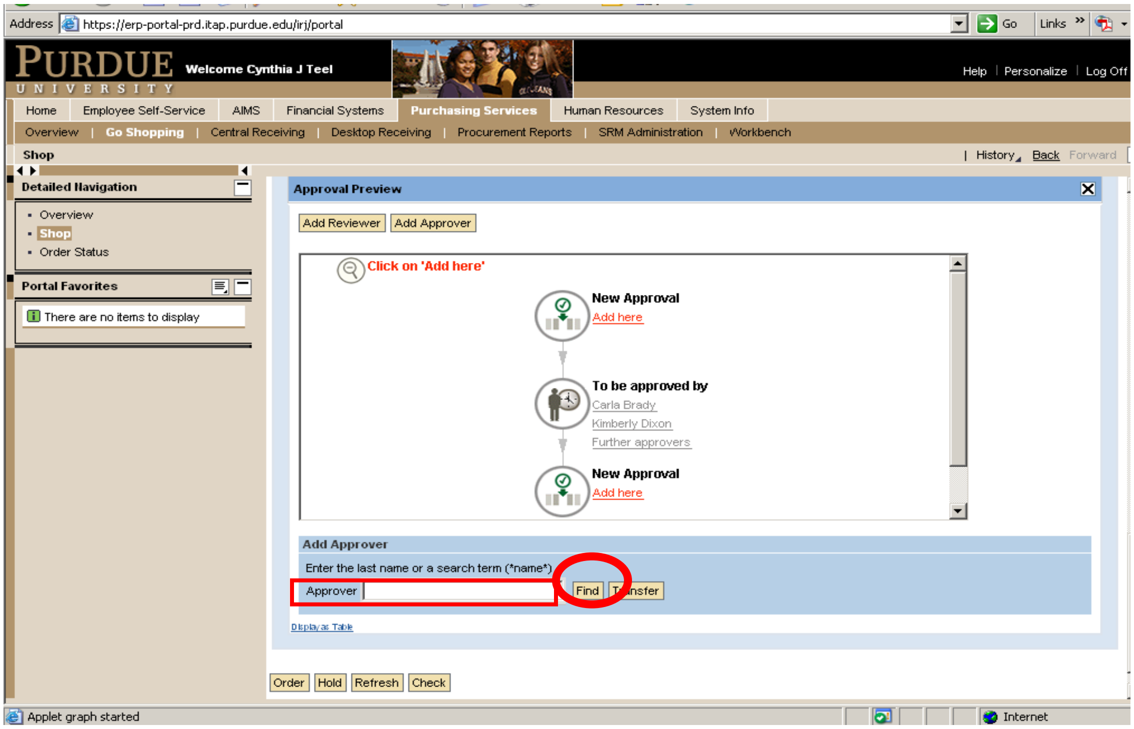
PI Initials Vendor Description



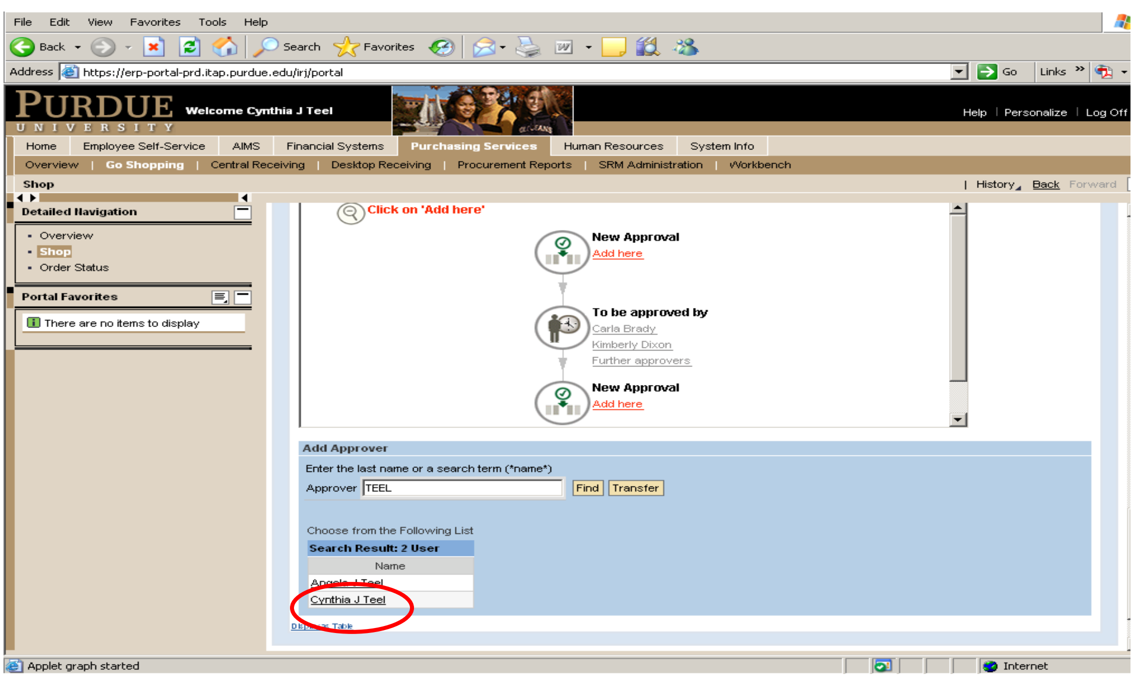
To add your account clerk as an approver, click on Add Approver.



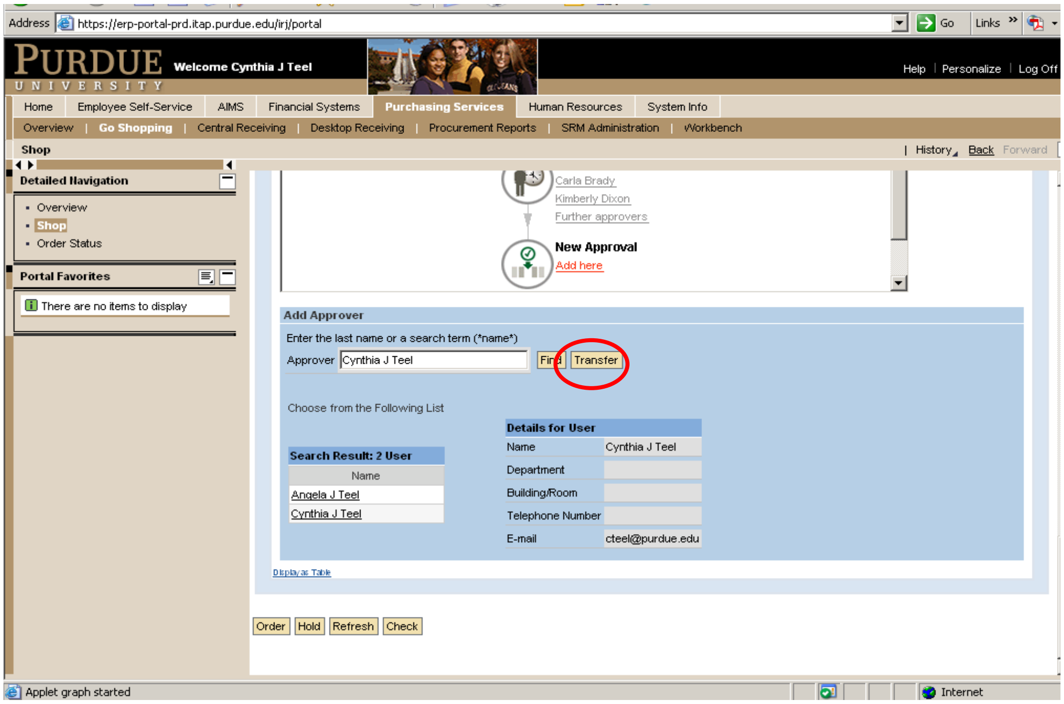
Click on Add Here for the level of approver that you want to add. The account clerk is always before the pre-entered fiscal approvers.



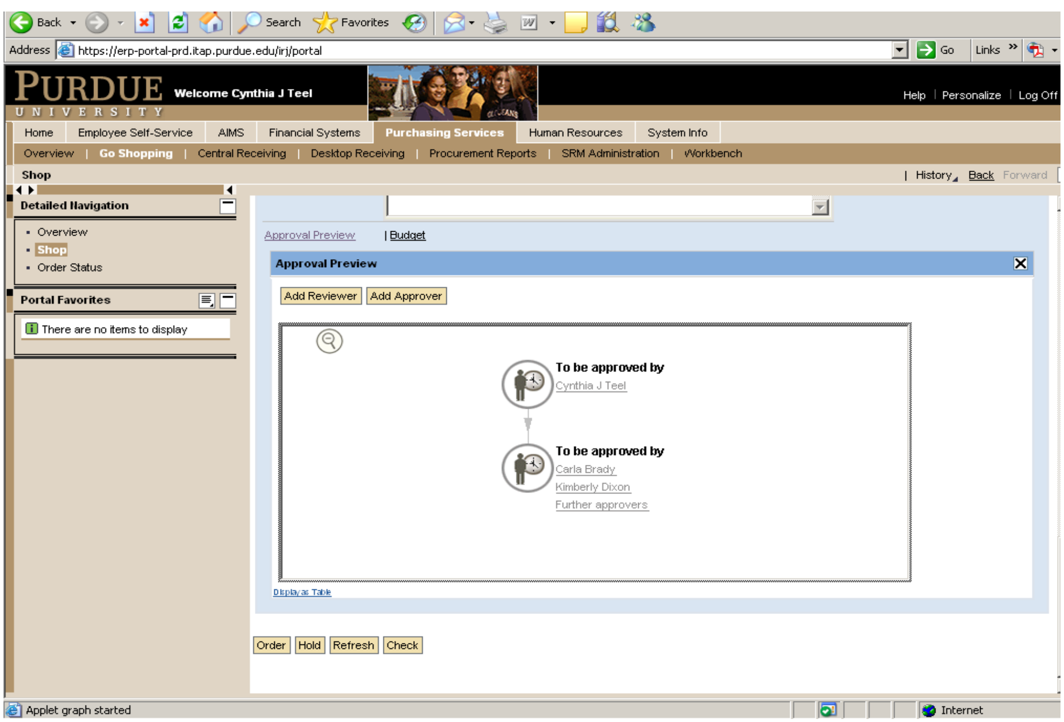
After clicking on Add Here, your screen will change. It will have an Approver box where you will enter the last name of the desired approver (for this example: *Teel*) and then click Find.



Click on Cynthia J Teel

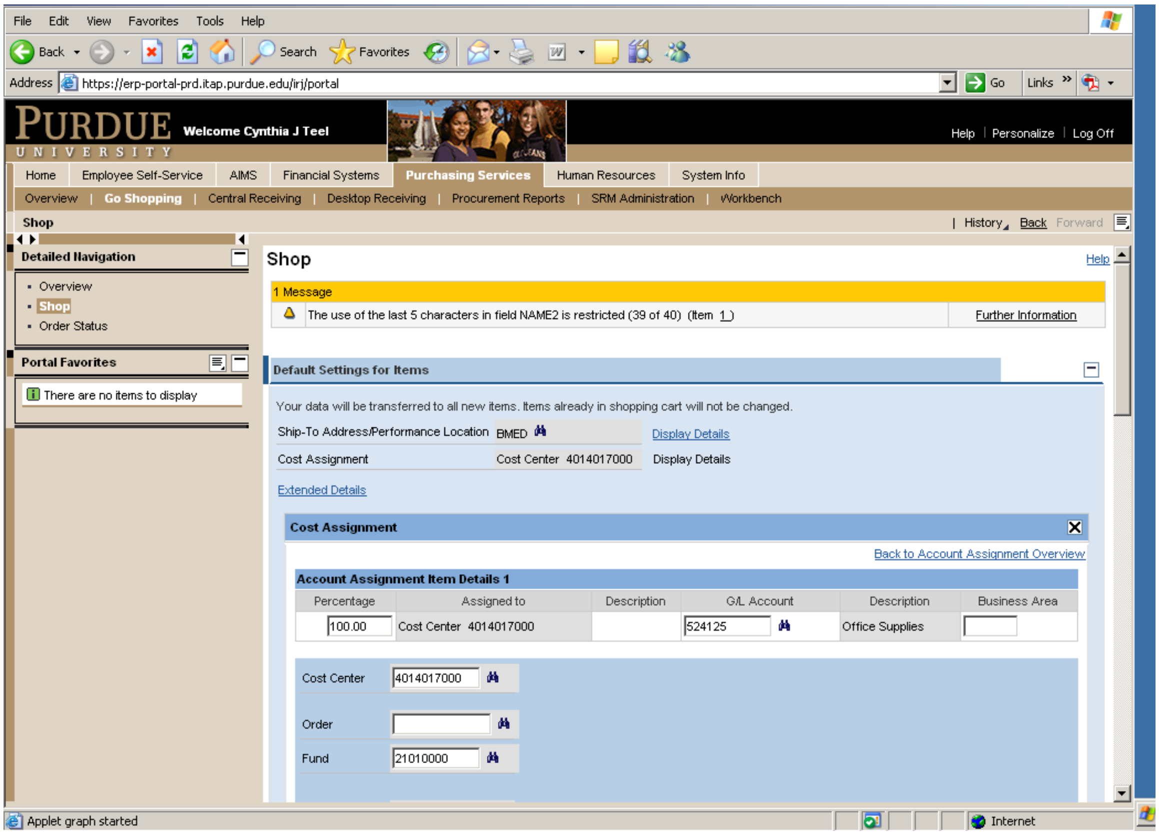


Once the Cynthia J Teel appears in the Approver box, click Transfer

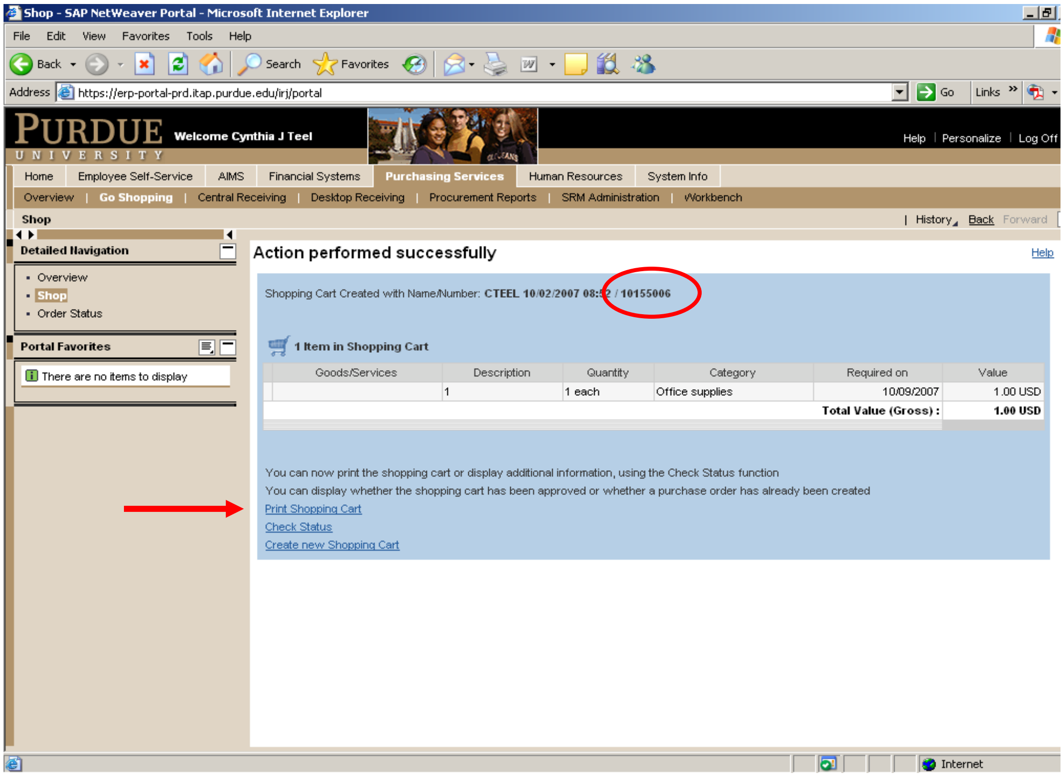


If you have completed this correctly, your screen will have the approval path as shown above.

Click on the Check button at the bottom of the order. This will check your order for any errors. If you have any errors, they will be listed at the top of your order.
Yellow errors are "ok." Red and Orange errors need to be corrected before submitting your order



If only yellow errors are shown, you can place the order by scrolling to the bottom and clicking on Order.



After clicking on Order, your screen will look like this.
You need to print your shopping cart and wait for the PO# to be assigned (see PowerPoint handout for instructions on how to find this) and then bring this paperwork along with your signed purchase request form to the business office.