Chemistry Online Purchase Order Request System
User Manual, Version 2.5

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Introduction

In an effort to streamline the process of requesting and managing purchase orders, the Chemistry Department has created an online purchase order request system, available at:

https://chem.po.northwestern.edu/

The system enables authorized users to submit and track purchase orders via a web-based interface. The user first completes and submits an online purchase order form. Following business office approval and entry of the order into the university's financial software, CUFS, the user's PO database is automatically updated and the user receives e-mail notification of the corresponding purchase order number. Business office personnel continuously monitor all purchase order requests placed between the hours of 8:30 am and 4:00 pm. Orders placed during this time frame will generally be processed within 15 minutes of submission.

Because all approval, status, and shipping/receiving changes to an order are updated in real time, an order's progress can be easily followed online. Detailed information about each order is available to users: date/time submitted, date/time the order was entered into CUFS, a line item description of delivery status, and comments particular to each order. The rapid recall of previously submitted orders is enhanced by a powerful search engine. Reporting and returns functionality are also built-in.

Several important security features have also been implemented. The link between the user's computer and the server is secure (https://), the system is not accessible outside of the Northwestern University computer network, and the system database is backed up on a nightly basis.

Establishing a User Account

Each new user must receive authorization from his/her respective lab head prior to being issued a user ID and password. The lab head's signature is required. New users should complete the *Online Purchasing System User Approval Form*, available on the front page of the website (in the upper right-hand corner, under "Forms").

Please contact the Chemistry Business Office with questions about access to the system.

New Orders

Submitting a New Request

To access the new order form, click the "New Order" link on the navigator bar. The submission of a purchase order requires two steps: 1) entry of vendor, item, and account information; and 2) confirmation and submission of the order. A screenshot of the ordering interface is provided on page 9.

STEP 1: Enter Vendor, Item, and Account Information

1. Recipient information, including user name, lab name, phone number, and e-mail address, appears on the new order automatically. To make changes to the phone number or e-mail address, see "My Account." For any other changes, contact the Business Office.

2. Select a Vendor from the pull down list. Any preferred vendors will appear first. To quickly scroll to a vendor, click once on the vendor pull-down list, then type the letter or letters of the name of the vendor. The list will immediately scroll to the appropriate letter.

   If you wish to add alternate phone numbers or other information to a vendor, you may do so using the "notes" field (my account > view vendors > click on vendor (see "My Accounts," page 7)).

   Only business office personnel can add a new vendor to the list. Please contact a representative of the business office by e-mail to request that a vendor be added to the list.

3. For each item in the order, enter a quantity (qty), select the unit, and enter an item number, description and unit cost. The total for each item will be calculated automatically. Each purchase order request can have up to 25 different items; additional entry lines will appear as needed. Please split orders with more than 25 different item numbers into separate orders.

4. Enter any comments in the Comments field. Alternate fax numbers or special processing instructions should be entered here.

5. Select an Order Method. Available order method types are Phone, Internet, Fax by University, Mail, and Pay Invoice.

6. Enter the shipping, handling or other costs in the Shipping Field.

7. Select the Account Number to use for the order. All authorized personal and group accounts should be listed in the pull-down field. Contact the Business Office if any accounts are missing.

8. Select an object code from the pull-down menu. For orders containing multiple object codes, please indicate in the comments field the line items which correspond to each object code. (ex: lines 1-4 #3010; lines 5-6 #3075)

9. Enter the Sub Org, if applicable. This is not a required field.

10. Select the amount to bill this account. By default, the total order amount appears on the first account line. Edit the amount, as necessary. Up to five accounts may be used for an individual order; additional account lines will appear as needed.

11. Verify that there is no discrepancy between the order total and the total amount allocated from the accounts.

12. Click "Verify Order" to go to the confirmation stage.

Step 2: Confirm and Submit Order

1. Review order information. If all information is correct, click "Submit Order." NOTE THAT YOUR ORDER WILL NOT BE SUBMITTED TO THE BUSINESS OFFICE UNTIL YOU CLICK "SUBMIT ORDER."

2. You may return to editing the order (Step 1 or 2) by clicking the "edit order" button (see "Editing an Order," below).

3. If you wish to cancel the order, click "Cancel Order." Canceling an order at this stage removes it from the database. No record is kept of the order. Please note that canceling an order at this stage is different than canceling an order after a purchase order has been submitted "see "Canceling a Submitted Order," page 5).

4. Orders that are neither submitted nor cancelled will be stored under "View My Orders" with status "In Progress" and can be either submitted or cancelled at a later time.

5. Upon order submission, the business office is notified of the request. If the order is approved or placed on hold, an e-mail notification will be sent.

6. Vendors should be advised to include the purchase order number on the outside of any packages.

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ORDER METHODS:

PHONE: The *laboratory* will phone in the purchase order number to the vendor. Many vendors will not accept phone-in orders. Check with your vendor before choosing this option.

INTERNET: Orders from which the vendor will accept an NU purchase order number online—and the lab submits the order directly to the vendor (similar to a phone-in order without the phone calls).

FAX BY UNIVERSITY: The University purchasing department will fax a copy of the official purchase order to the vendor. If you wish to use a fax number other than that shown in the vendor information, please include the alternate fax number in the comments section.

MAIL: The University purchasing department will mail a copy of the purchase order to the vendor.

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EDITING AN ORDER

Users may only edit an order prior to submission to the business office. Orders at the pre-submission stage are classified as "In Progress" (see Order Stages, page 8).

Editing Orders "In Progress"

To make changes to an order that is "In Progress":

1. Select the order from "View My Orders."
2. Click the "Edit Order" button.
3. Edit as necessary.
4. Click "Verify Order" button.
5. Confirm order information is correct.
6. Click "Submit Order" button.

CANCELING AN ORDER

An order can be cancelled at any time until it has been received. After all or part of an order has been received, it becomes a Return. Please contact the Receiving Department (Peter Fish/Fenton Powell) to manage returns.

Canceling an Order BEFORE Submission to the Business Office

The "Cancel Order" button can be clicked during the entry or verification stages to cancel the order. No record will be kept of orders cancelled before submission.

Canceling a Submitted Order

To cancel an order that is "Awaiting Approval" or "Awaiting Delivery":

1. Select the order from "View My Orders."

2. Enter any comments (such as the reason for the cancellation) in the comments field.

3. Click the "Cancel Order" button. The cancellation request will be sent to the business office for final cancellation. Although the business office will make every effort to stop the submission of a university purchase order, ***labs are responsible for contacting the vendor to cancel the order.***

4. Orders cancelled after submission will remain in the "View My Orders" with a "Cancelled" status.

VIEW ORDERS

The View Orders page displays the most recent orders placed from your account (you may define the number of orders shown in this table by clicking on "My Account").

If you have group administrator privileges, this page will display orders placed by all members of the lab groups. You may check your user privileges by clicking on the "My Account" link at the top of each page. A change in permission level requires approval of the lab head (see "User Permissions Level" on page 8).

Clicking on the "▲" or "▼" button will sort the purchase orders in the designated field in ascending or descending order, respectively. Note that some fields are sorted numerically (Date, Requisition number), while others are sorted alphabetically (Lab/Name, Vendor, Status).

View My Orders

To view an order summary, click on the date link for the order. The order summary reflects all information about an order. In addition to the vendor information, order details and payment information, the order summary records the purchase order provided by the business office, a status indicator, a log of actions taken on the order, and a comments log. A screenshot of an order summary page can be found on page 11).

Quick Find

To quickly find a specific purchase order, use the Quick Find search tool, found in the leftmost column of the View Orders page. Enter a keyword or a purchase order number (keyword includes recipient, vendor, item number and description). An asterisk (*) may be used as a wildcard.

Advanced Search

The advanced search field (view orders > advanced search) allows the user to retrieve purchase orders by dates, purchase order amount, purchase order number, receipt, and vendor. Keyword searches by line item, account number and comments are also possible. Any combination of search fields can be used.

An asterisk (*) may be used as a wildcard for any search field. Thus, entering "*15*" would return all orders which include 151 anywhere in the order number.

Favorite orders

Users now have an easy mechanism to classify an order as a "favorite" and to quickly resubmit that order. To classify an order as a favorite, from the View Orders tab:

1. Check the box corresponding to the order you wish to add as a favorite. You may check multiple orders.

2. Check the Favorites button at the bottom of the page. Orders may also be added to the favorites menu from the order detail screen (PO_View.php).

3. To submit a Favorite Order, click the green resubmit icon. A new purchase order request will be generated with the vendor, item number, description, price, and order method fields pre-population.

4. To remove an order from the Favorite Orders table, click the red delete icon. This action only removes the order from "Favorite Orders" – not from the system.

MY ACCOUNT

From the My Account section, a user can edit their contact phone number and e-mail addresses, see the user permission level, view authorized accounts, and set the number of purchase orders and favorite orders seen on the "View Orders" screen.

Change a password, phone number or e-mail address

1. To change the phone number or e-mail, click on My Account under the date in the header.

2. Edit the fields as necessary.

3. When finished, click "Update User."

VENDOR LIST

Each account has its own preferred vendor list. Preferred vendors appear at the top of the list of vendors when making a new order. To review the current vendor list, click on "My Account" in the page header, then "My Vendor List" from the My Account navigation bar. New vendors can only be added to the master list by a member of the business office.

Users may also add a note to each vendor (account number, discount information, alternate phone number, etc.) by entering the appropriate text in the "Notes" field for each vendor (see "Add a Note to a Vendor," below).

Adding an Existing Vendor to the Preferred Vendor List

1. To add a vendor to your preferred vendor list, click on "View Vendors" from the My Account Navigation. All vendors appear in this list; however, it is possible to view vendors on multiple pages sorted by each letter of the alphabet instead by clicking the index letter at the top and bottom of the screen.

2. Place a check mark next to any vendor to be added to the vendor list.

3. Click "Add/update Vendor."

   Note: If using the index tabs to view vendors on multiple screens, "Add/update Vendor" must be clicked on each screen to add the vendors selected.

Remove a Preferred Vendor

1. To remove a preferred vendor, select "My Vendor List" from the My Account navigation.

2. Check the box next to any vendor to remove. Index tabs at the top and bottom of the table help navigate through the list.

3. When all vendors to be removed have been checked, click "Remove Vendor."

Note: Vendors removed from the preferred list are still available to user on orders as part of the main vendor list.

Add a note to a vendor

1. Click on “View Vendors.”

2. Click on the appropriate vendor.

3. Add the text of your note in the “Notes” field. Be sure to click “Update Notes” when you are through.

User Permission Levels

User permission levels are established for each person at the time the individual's account is established. Changes in user permission levels require the approval of the lab head.

User

- May submit orders from group accounts and from accounts specific for the user.
- "View My Orders" displays only those orders placed by the user. Orders placed by other group members are not displayed.

Group Administrator

- Includes all User level permissions (above).
- "View my Orders" displays all orders placed by the group.
- Includes "Reports" functionality (see Reports, page 10).

Lab-Based Receiving

Some goods may be delivered directly to labs, necessitating that select lab users have permission to mark orders as received in the PO request system. Users may also wish to mark as received purchase orders which do not include receivable goods (e.g., invoices or journal subscriptions). PLEASE NOTE THAT PROCESSING AN ORDER AS RECEIVED IN THIS SYSTEM DOES NOT MARK THE ORDER AS RECEIVED IN CUFS. If you receive an order to the labs, please contact the shipping and receiving staff to ensure the order is appropriately marked as received in CUFS.

How to Receive an Order

1. Click on the Receiving tab. Use the search engine to find an order by purchase order number, keyword, etc.
2. Click on the date of the order you wish to receive.
3. If all items are present in the package, click the "Receive All" button at the bottom of the page.
4. If the shipment is incomplete (backordered or out-of-stock items), you may enter the number of items received on a line item by line item basis (under the "receive" column heading).
5. Click on "Update Record" to mark the items as received.
6. Incomplete orders will remain in the receiving table until all items have been received.

REPORTS

All users with permission above the user level have access to view the Reports page. Group administrators have limited access and may only view reports for their group. Reports can be accessed from links in the secondary navigation of the "View My Orders" and "Receiving" sections.

The Reports page displays the following totals for the specified criteria.

- Number of Active Purchase Orders
- Number of Cancelled Purchase Orders

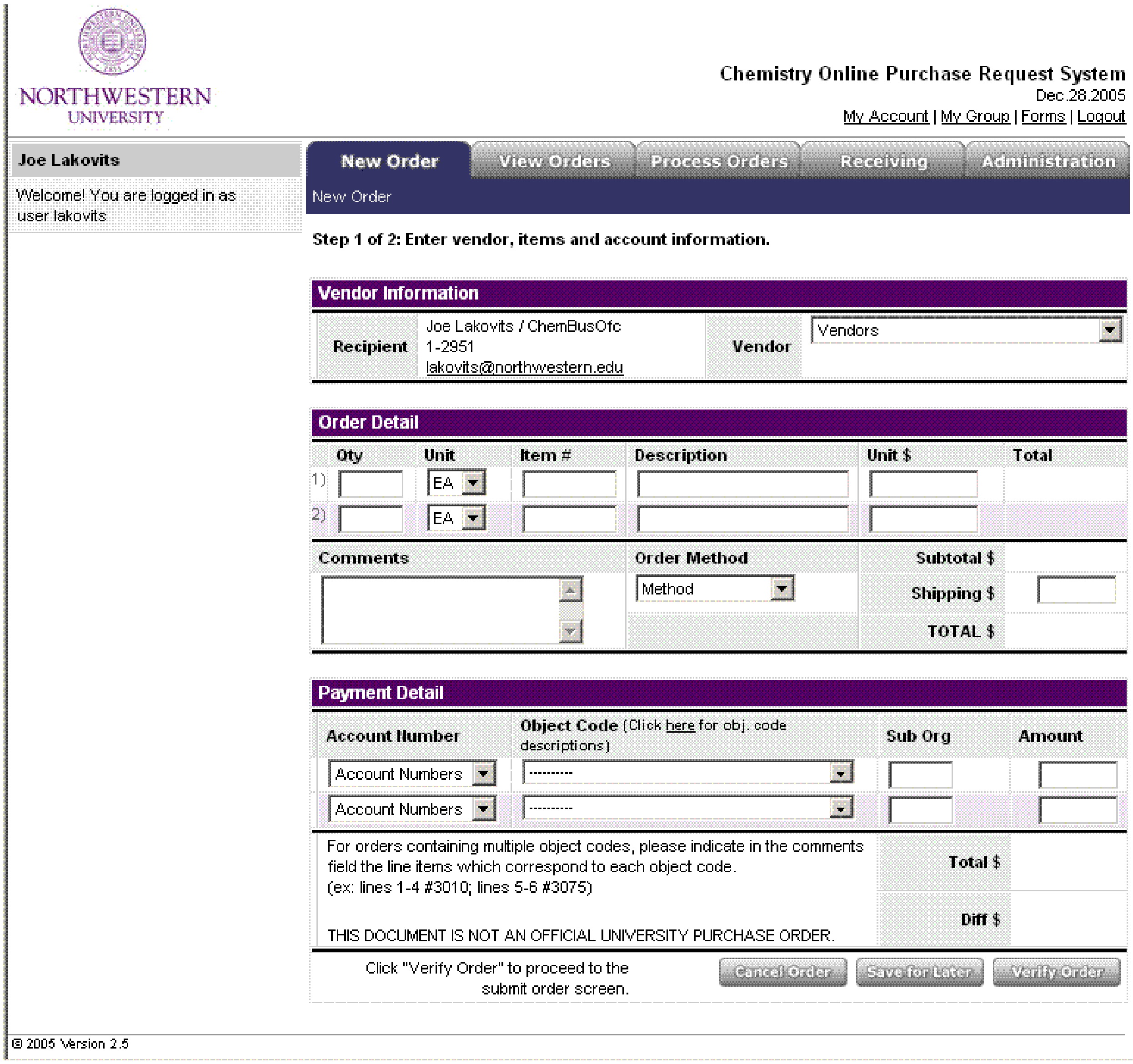
- Number of Orders Entered into CUFS
- Number of Department Approved Orders
- Number of University Approved Orders
- Total Number of Items Ordered
- Total Number of Items Received
- Total Purchase Amount
- Number of Orders with No Receiving Required

By default, the reports page displays the summary for all purchase orders entered into the system (or for group administrators all orders by the specified lab group).

The report may be customized by date range, vendor, account number, and object code.

Within each row of the purchase order report, the "Show" link will display a detailed list of orders meeting the given search criterion/criteria. Report results are displayed on a single page.

New Order Screen



1. Change your e-mail address and/or telephone number by following the "My Account" link. Favorite vendors can also be set here (see #3, below).

2. Recipient Information: Please ensure that your name and laboratory are listed correctly. Telephone and email addresses are editable in "My Account."

3. Choose a vendor from the pull-down menu. The accounting office can add new vendors. Users can set favorite vendors (which will appear at the top of the vendor pull-down list) in the "My Account" menu. To quickly scroll to a vendor beginning with the letters Sig, click once on the vendor pull down menu, then type "Sig."

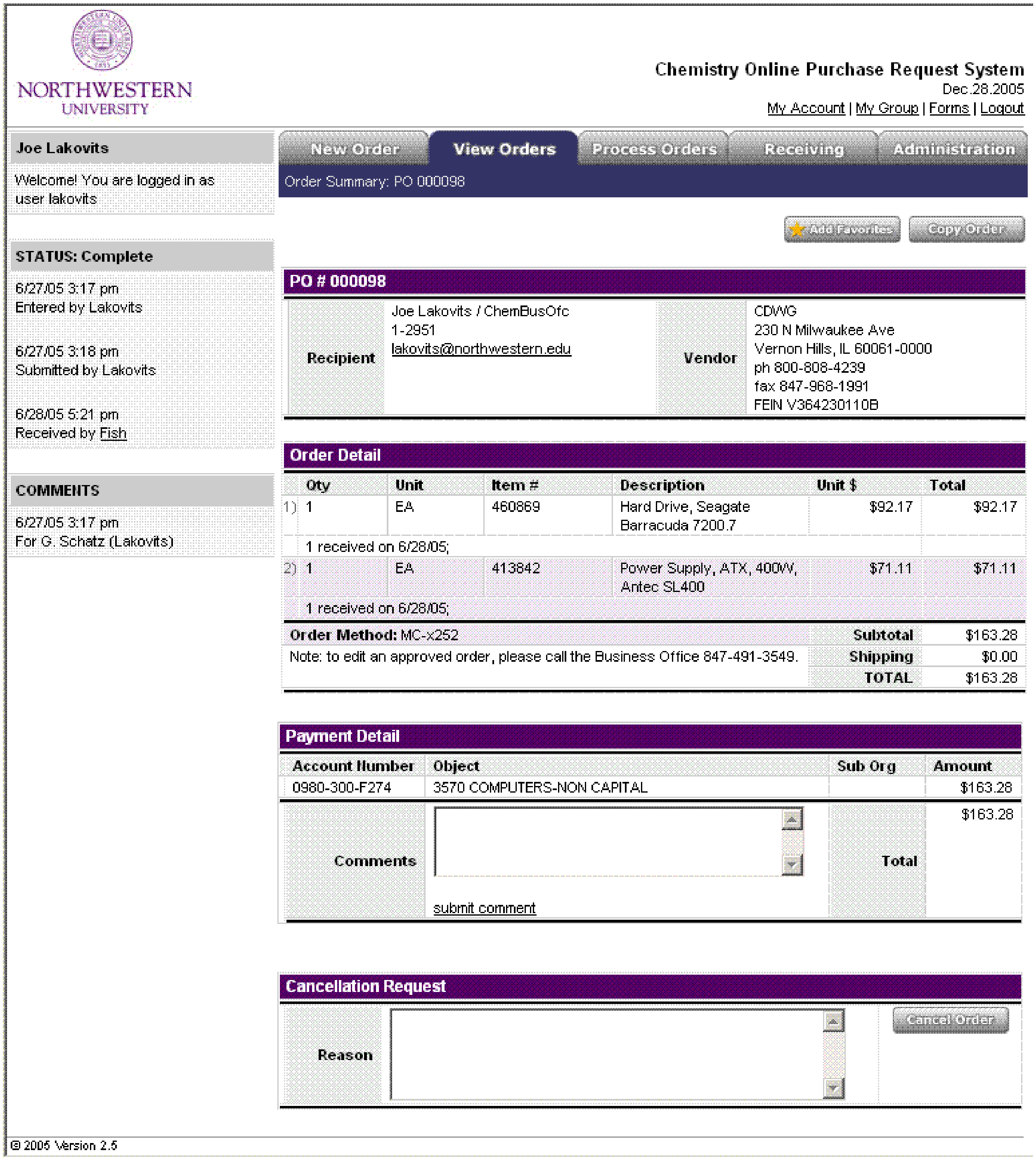
4. Quantity, Unit, Item #, Description, Unit Cost, Order Method, and Account Number are required fields.

5. Orders which contain items on multiple object codes should include a description in the comments field which explains the line item break-out by object code.

6. If the dollar value of the items to be ordered does not reconcile with the dollar value in the Payment Detail, a discrepancy value will appear here. A discrepancy must be corrected for the order to be accepted.

7. Click “Verify Order” to proceed to the second step: confirming and submitting the order.

View Order Screen



NORTHWESTERN UNIVERSITY

Chemistry Online Purchase Request System
Dec.28.2005
My Account | My Group | Forms | Logout

New Order | View Orders | Process Orders | Receiving | Administration

Order Summary: PO 000098

Joe Lakovits

Welcome! You are logged in as user lakovits

STATUS: Complete

6/27/05 3:17 pm
Entered by Lakovits

6/27/05 3:18 pm
Submitted by Lakovits

6/28/05 5:21 pm
Received by Fish

COMMENTS

6/27/05 3:17 pm
For G. Schatz (Lakovits)

Add Favorites | Copy Order

PO # 000098

Recipient	Joe Lakovits / ChemBusOfc 1-2951 lakovits@northwestern.edu	**Vendor**	CDWG 230 N Milwaukee Ave Vernon Hills, IL 60061-0000 ph 800-808-4239 fax 847-968-1991 FEIN V364230110B

Order Detail

	Qty	Unit	Item #	Description	Unit $	Total
1)	1	EA	460869	Hard Drive, Seagate Barracuda 7200.7	$92.17	$92.17
	1 received on 6/28/05;					
2)	1	EA	413842	Power Supply, ATX, 400W, Antec SL400	$71.11	$71.11
	1 received on 6/28/05;					

Order Method: MC-x252	**Subtotal**	$163.28
Note: to edit an approved order, please call the Business Office 847-491-3549.	**Shipping**	$0.00
	TOTAL	$163.28

Payment Detail

Account Number	Object	Sub Org	Amount
0980-300-F274	3570 COMPUTERS-NON CAPITAL		$163.28
Comments	submit comment	**Total**	$163.28

Cancellation Request

Reason

Cancel Order

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1. The status log identifies the current status of the order and includes a chronological list of all actions taken on the order, including initial submission date, approvals,

instances where the order was edited, and receiving status. This section of the order is not editable.

2. The comments log contains a record of all comments added by the user, business office, and shipping and receiving. This portion of the order is also not editable.

3. Line item receiving information is available here. In this case, two of two items were received on 6/28/05. Hence, the status of this order is “Complete.”

4. Click “Add Favorites” to add this order to your list of favorite orders. You may also click “Copy Order” to copy the vendor, line items, etc. to a new order for resubmission.

5. User may add notes to vendors (vendor account number, etc.) in the my account>edit vendors page (see p. 7). The business office may post a business note (Bus. Note”) in the vendor listing to remind the user about a particular business practice followed by the vendor (paper bid required, etc.).

Frequently Asked Questions:

1. **I can't log into the system from off-campus/home/the library**
   For security reasons, access to the system is restricted by IP address. Only IP addresses associated with the Northwestern University and the Virtual Private network have been authorized to access the system. For more information about VPN see: http://www.it.northwestern.edu/oncampus/vpn/.

2. **The Vendor I wish to use is not in the system**
   If your selected vendor is in the CUFS database of vendors, a member of the business office staff can add the new vendor in a matter of minutes. If Northwestern has not used the vendor in the past, please allow 2-3 days for vendor approval from the University.

3. **My order is on hold. What do I do?**
   Orders are placed on hold for a variety of reasons, including missing/incomplete paperwork, insufficient funds, etc. From the status and comments logs, you should be able to easily identify the issue and the business office staff member who processed the order. She/he will be able to help you correct the issue.

4. **I have a paper quotation associated with my order. How do I handle these documents?**
   Complete the online form as normal. In the comments field, indicate that a paper quote is to be delivered to the business office. The order will be placed on hold until the necessary documentation arrives.

5. **I want to purchase a restricted enzyme from a lab freezer program. How does this work?**
   Choose the vendor from the pull-down menu which includes "Freezer" after the name. Check the "no receiver required" box to ensure the order is marked as complete.

6. **I can't see the orders placed by other members of the lab group in my "View my Orders" screen.**
   The ability to see all purchase orders for a given lab is a function of user permission level. Only group administrators can see the orders for an entire lab. Users can only see their own orders. All members of a lab may be given group administrator privileges. This decision is left to the discretion of the lab head.

7. **I realize I made an error after submitting an order. Now I can't edit the order. What do I do?**
   A member of the accounting office can edit your order. The accounting office will not edit orders to add shipping costs, etc. unless the charge is significant.

8. **I submit orders for two separate laboratories, each with different accounts. How do I do this?**
   In Version 1 of the PO software, this arrangement necessitated two login IDs. In the current version, users are not limited to spending from a single lab's accounts. With the appropriate authorization, the business office can add any account to your approved list.

9. **Can I purchase radioactive isotopes with the system?**
   Yes. Complete the online form as usual. Please enter your isotope control number in the comments field. When your purchase order number is returned, the order will be marked as "complete" because Chemistry shipping personnel do not receive radioactive orders.

10. **The status of my purchase order to pay an invoice is mistakenly listed as "Awaiting Delivery." How do I mark this order as complete?**
    Receiving privileges may be given to lab users, at the discretion of your lab head. With receiving privileges, you can simply add a comment and mark the order as received. Alternatively, you may contact the business office and a business office staff member will mark the order as received.