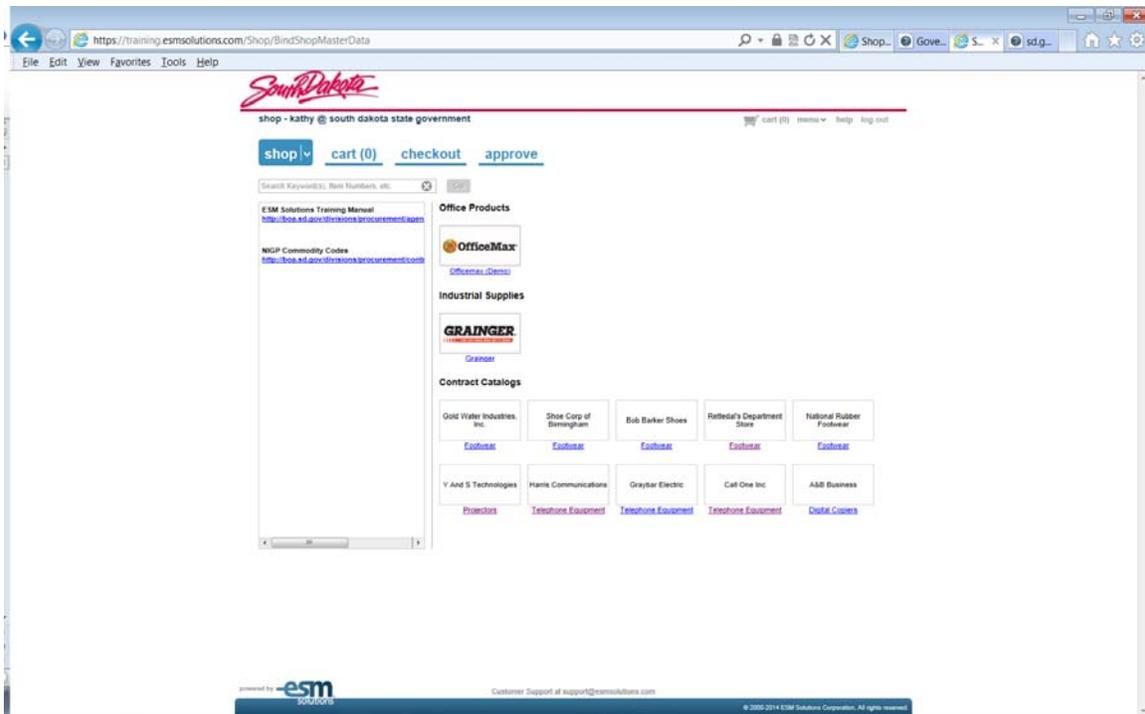


ESM Training Manual

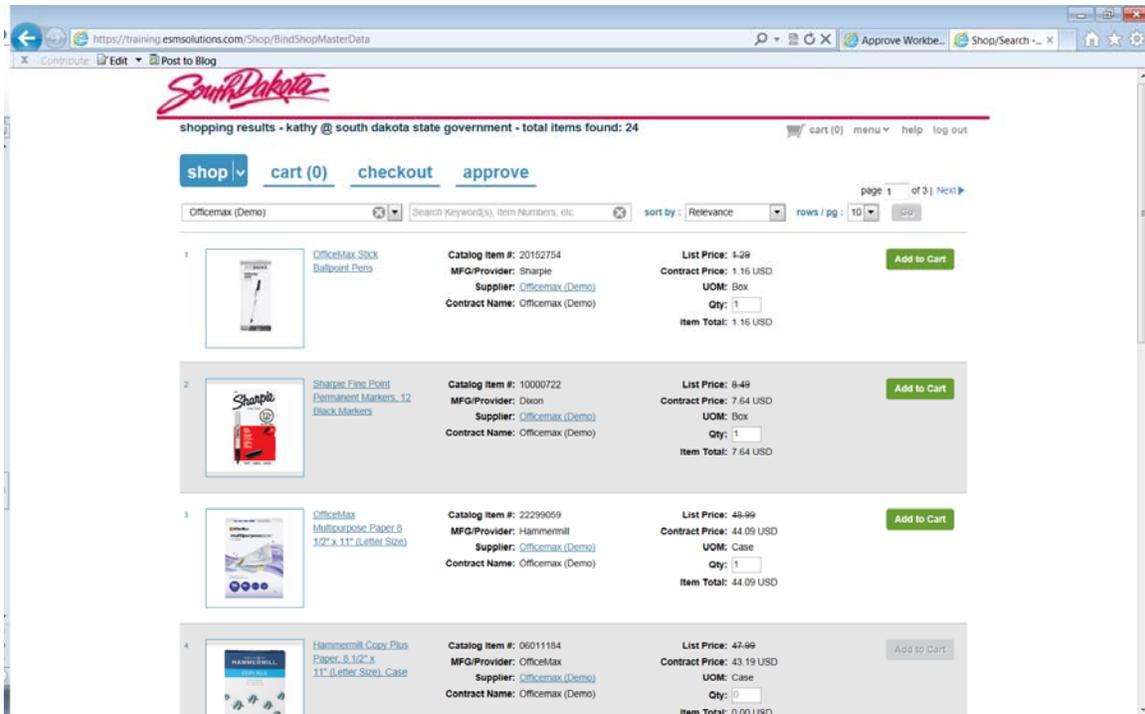
Punch-Out Catalog Orders – OfficeMax, Grainger & Fastenal

Direct Voucher – Purchases Under \$4000

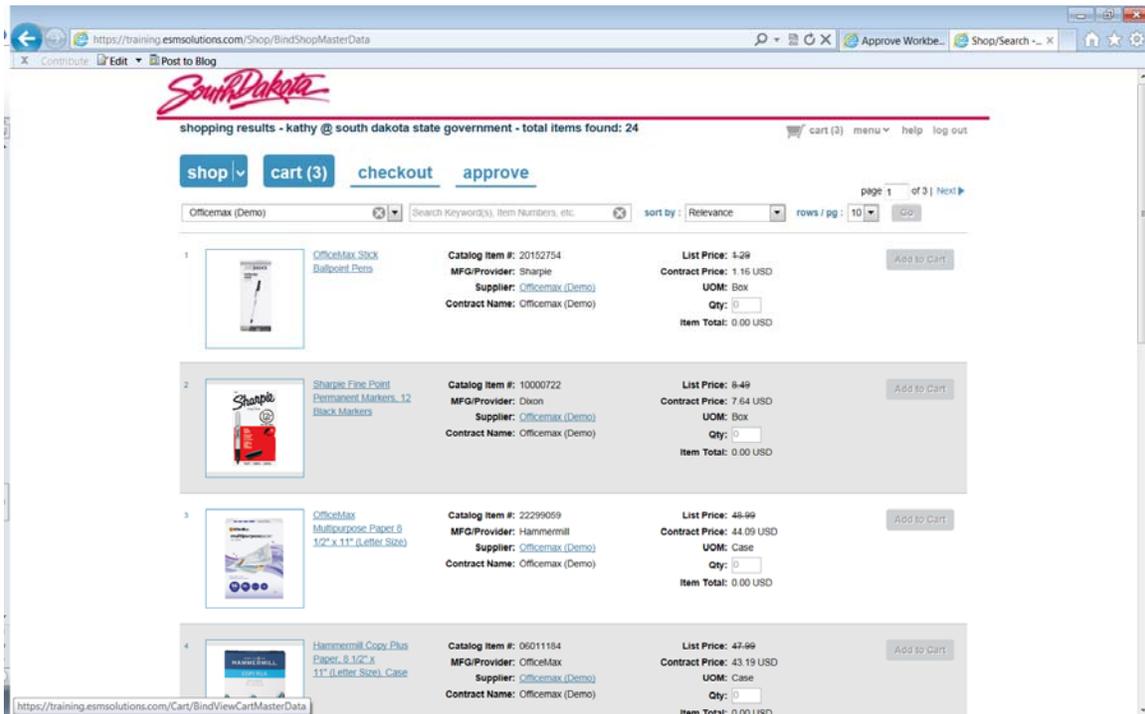


Select **OfficeMax**

In the training environment, OfficeMax is just a Demo site; in the production environment, when you select OfficeMax, you will be taken directly to the OfficeMax site.



Select your items you wish to purchase by putting in the quantity and select **Add to Cart**



Select **Cart**

https://training.esmsolutions.com/Cart/BindViewCartMasterData

shop **cart (3)** checkout approve

sort by: Price low to high rows / pg: 10 / 05

Convert Cart to 1 transaction(s):

 <p>OfficeMax Stick Ballpoint Pen</p>	<p>Catalog Item #: 20152754 MFG/Provider: Sharpie Supplier: OfficeMax (Demo) Contract Name: OfficeMax (Demo)</p>	<p>Contract Price: 1.16 USD UOM: Box Qty: <input type="text" value="1"/> Item Total: 1.16 USD</p>	<p><input type="button" value="Update"/> <input type="button" value="Delete"/></p>
 <p>Sharpie Fine Point Permanent Markers, 12 Black Markers</p>	<p>Catalog Item #: 10000722 MFG/Provider: Dixon Supplier: OfficeMax (Demo) Contract Name: OfficeMax (Demo)</p>	<p>Contract Price: 7.64 USD UOM: Box Qty: <input type="text" value="1"/> Item Total: 7.64 USD</p>	<p><input type="button" value="Update"/> <input type="button" value="Delete"/></p>
 <p>OfficeMax Multipurpose Paper 8 1/2 x 11 (Letter Size)</p>	<p>Catalog Item #: 22299059 MFG/Provider: Hammermill Supplier: OfficeMax (Demo) Contract Name: OfficeMax (Demo)</p>	<p>Contract Price: 44.09 USD UOM: Case Qty: <input type="text" value="1"/> Item Total: 44.09 USD</p>	<p><input type="button" value="Update"/> <input type="button" value="Delete"/></p>

Total Item(s) in Cart: 3
 Number of Suppliers: 1
 Cart Subtotal: 52.89 USD
 Tax: 0.00 USD
 Cart Total: 52.89 USD

Convert Cart to 1 transaction(s):

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 Customer Support at support@esmsolutions.com

Select **Continue**

https://training.esmsolutions.com/Requisition/BindViewRequisitionMasterData

checkout - kathy @ south dakota state government

shop **cart (0)** checkout approve

selection: Recent sort by: Transaction # rows / pg: 10 / 05

Transaction #: 911274
 Transaction Name: 07/15/2014-12-55-Stack-OfficeMax (Demo).pdf
 Create Date: 7/15/2014
 Supplier: OfficeMax (Demo)
 Total Line Items: 3
 Total Value: 52.89 USD

Payment Form: Credit Card PO
 Release Method:
 Approval Workflow:
 External Note: [add attachments](#)
 Internal Note: [add attachments](#)
 Commodity Code: 615 - OFFICE SUP.
 Fiscal Date: 7/15/2014
 Purchase Order #: 15P0019274

Selection: Active
 Status: Unsubmitted Transaction
 System Note: None
 Next Step: Provide Missing Data

Chart of Accounts:
 Index Code:
 GL Acct. Code:

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 Customer Support at support@esmsolutions.com
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Payment Form: **PO**

Release Method: **Electronic**

Purchase Order will automatically be released to the vendor. **Select Electronic only for the Punch-Out Catalogs.**

Approval Workflow: **Agency Workflow**

External Note: External Note is information or instructions to the vendor. This information will be printed on the purchase order. OfficeMax does not read External Notes so it is recommended that you do not provide any information in the External Notes if the order is going electronically to OfficeMax.

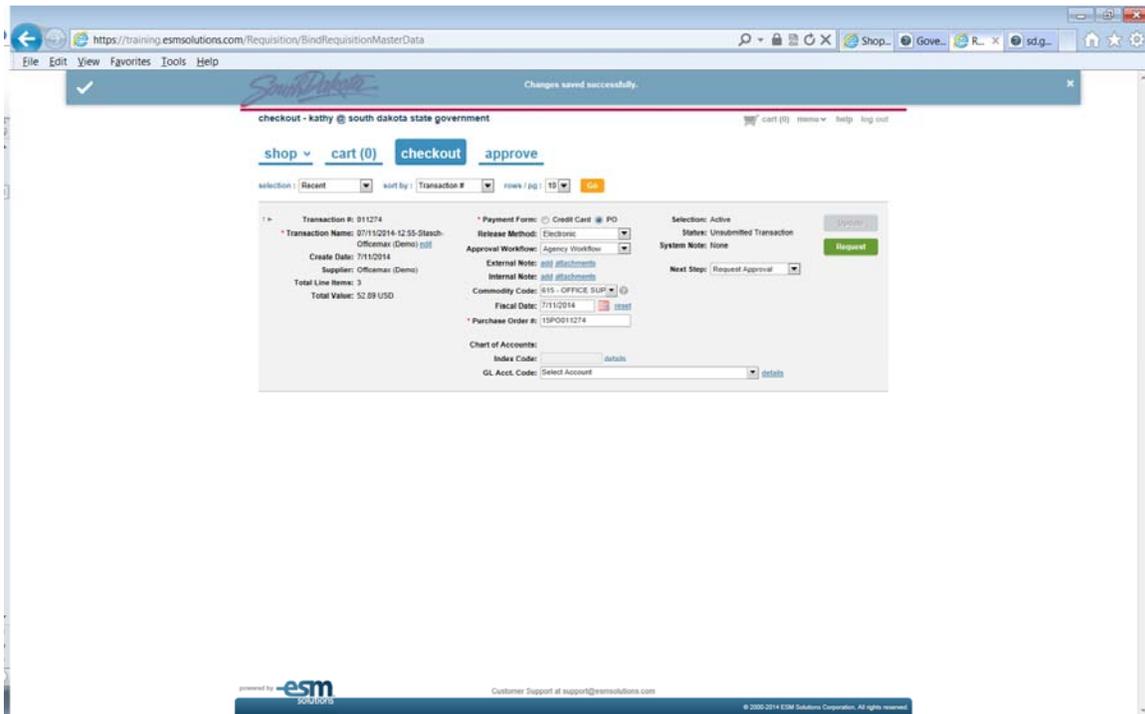
Internal Note: Internal Note is information that can be viewed only by the State Agency and Office of Procurement Management. Information you may want to provide is who the item is for or any other information you may find pertinent to the requisition.

NIGP Code Required: **615 Office Supplies**

Purchase Order #: 15PO + the last 6 digits of the Transaction # such as **15PO011274**
This is referred to as a Local Purchase Order which will not be encumbered through the State's accounting system.

GL Acct. Code: Can be left blanked since it is a Local Purchase order

Select **Update**



Select **Request**

Requisition is now waiting for the Agency approval. When requisition has been approved, the creator of the requisition will receive an email stating the requisition has been approved and they may now write the purchase order and release it.

Select Checkout

Select the proper requisition to be submitted by reviewing the Transaction #, Transaction Name, Supplier and Total Value. You may have more than one requisition that has been approved and needs to be submitted to the vendor.

The screenshot shows a web browser window displaying the ESM Solutions application. The URL is <https://training.esmsolutions.com/Requisition/Bind/RequisitionMasterData>. The page header includes the South Dakota logo and the user 'checkout - kathy @ south dakota state government'. Navigation tabs include 'shop', 'cart (0)', 'checkout', and 'approve'. A table lists requisitions, with the first one selected. The details for Transaction # 011274 are shown in a modal window.

Transaction #	Transaction Name	Supplier	Total Value
011274	07/15/2014 12:55:55 Stasch-Officemas (Demo)	Officemas (Demo)	52.89 USD

Transaction # 011274

Transaction Name: 07/15/2014 12:55:55 Stasch-Officemas (Demo) [View](#)

Create Date: 7/15/2014

Supplier: Officemas (Demo)

Total Line Items: 3

Total Value: 52.89 USD

Payment Form: PO

Release Method: Electronic

Approval Workflow: Agency Workflow

External Note: [Attachments](#)

Internal Note: [Attachments](#)

Commodity Code: 815 - OFFICE SUPPLIES, GENERAL

Fiscal Date: 7/15/2014

Purchase Order #: 1SP011274

Chart of Accounts:

Index Code: [Details](#)

GL Acct. Code: [Details](#)

Selection: Active

Status: Pending Release

System Note: None

Next Step: Release PO

[Update](#) [Release](#)

Select Release

shop cart (0) checkout approve

purchase order

Officemax (Demo)
2 Walnut Grove
Horsham, PA 19044
United States
Attn: Jeff Mason
Phone: 215-444-9300

Date: 7/11/2014
Purchase Order #: 1SP0011274
Transaction #: 011274
Requested By: Kathy Stasch
Requester Email: kathy.stasch@state.sd.us
Authorized By: Kathy Stasch

Continue
Print
Cancel

Ship To
South Dakota State Government
EM 0110131 PROCUREMENT
MANAGEMENT
523 EAST CAPITOL AVENUE
PIERRE, SD 57501-3182
United States
Attn: Kathy Stasch
Phone: 605-773-3405

Bill To
South Dakota State Government
EM 0110131 PROCUREMENT
MANAGEMENT
523 EAST CAPITOL AVENUE
PIERRE, SD 57501-3182
United States
Attn: Dawn Dalton
Phone: 605-773-3405

Order Comments:

Item #	Description	UOM	QTY	Unit Price	Line Total
20152754	OfficMax Stick Ballpoint Pens	Box	1	1.16 USD	1.16 USD
10000722	Sharpie Fine Point Permanent Markers, 12 Black Markers	Box	1	7.64 USD	7.64 USD
22290559	OfficMax Multipurpose Paper 8 1/2" x 11" (Letter Size)	Case	1	44.09 USD	44.09 USD
					Subtotal: 52.89 USD
					Tax: 0.00 USD
					S&H: 0.00 USD
					Total: 62.89 USD

Select **Continue**

shop cart (0) checkout approve

purchase order

Officemax (Demo)
2 Walnut Grove
Horsham, PA 19044
United States
Attn: Jeff Mason
Phone: 215-444-9300

Date: 7/11/2014
Purchase Order #: 1SP0011274
Transaction #: 011274
Requested By: Kathy Stasch
Requester Email: kathy.stasch@state.sd.us
Authorized By: Kathy Stasch

Continue
Print
Cancel

Ship To
South Dakota State Government
EM 0110131 PROCUREMENT
MANAGEMENT
523 EAST CAPITOL AVENUE
PIERRE, SD 57501-3182
United States
Attn: Kathy Stasch
Phone: 605-773-3405

Bill To
South Dakota State Government
EM 0110131 PROCUREMENT
MANAGEMENT
523 EAST CAPITOL AVENUE
PIERRE, SD 57501-3182
United States
Attn: Dawn Dalton
Phone: 605-773-3405

Order Comments:

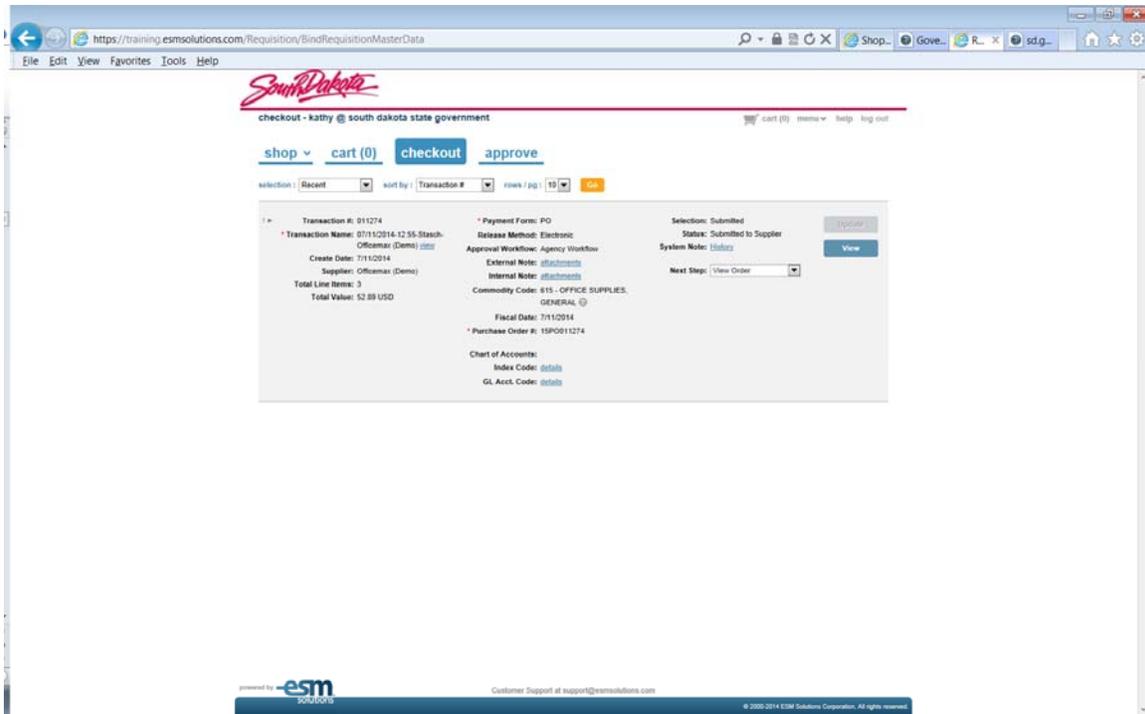
Item #	Description	UOM	QTY	Unit Price	Line Total
20152754	OfficMax Stick Ballpoint Pens	Box	1	1.16 USD	1.16 USD
10000722	Sharpie Fine Point Permanent Markers, 12 Black Markers	Box	1	7.64 USD	7.64 USD
22290559	OfficMax Multipurpose Paper 8 1/2" x 11" (Letter Size)	Case	1	44.09 USD	44.09 USD
					Subtotal: 52.89 USD
					Tax: 0.00 USD
					S&H: 0.00 USD
					Total: 62.89 USD

Submit Order - easypurchase - Training

This action will result in the order being transmitted to the supplier.
Are you sure you wish to continue?

Place Order Cancel

Select **Place Order**



You can then select System Note: **History**
This will allow you to see that your purchase order was successfully released to the supplier.

Purchasing Card - Purchases Under \$4000

This is assuming you have added items to your cart and are ready to checkout; for instructions on selecting and adding items to your cart see page 1. The instructions below are starting from Checkout after you have added items to your cart.

The screenshot shows a web browser window with the URL <https://training.esmsolutions.com/Requisition/BindRequisitionMasterData>. The page header includes the South Dakota logo and the user name 'checkout - kathy @ south dakota state government'. Below the header, there are navigation tabs for 'shop', 'cart (0)', 'checkout', and 'approve'. The 'checkout' tab is active. The main content area displays transaction details for Transaction # 011275. Key information includes: Transaction Name: 07/11/2014-13:07-Stack-OfficeMax (Demo) edit; Create Date: 7/11/2014; Supplier: OfficeMax (Demo); Total Line Items: 2; Total Value: \$1.10 USD. The Release Method is set to Electronic, and the Approval Workflow is Agency Workflow. The Payment Form is Credit Card. The Purchase Order # is 15PO011275. The page also shows a 'Next Step: Provide Missing Data' and an 'Update' button.

Payment Form: **Credit Card**

Release Method: **Electronic**

Approval Workflow: **Agency Workflow**

External Note: External Note is information or instructions to the vendor. This information will be printed on the purchase order. OfficeMax does not read External Notes so it is recommended that you do not provide any information in the External Notes if the order is going electronically to OfficeMax.

Internal Note: Internal Note is information that can be viewed only by the State Agency and Office of Procurement Management. Information you may want to provide is who the item is for or any other information you may find pertinent to the requisition.

NIGP Code Required: **615 Office Supplies**

Purchase Order #: 15PO + the last 6 digits of the Transaction # such as **15PO011275**
This is referred to as a Local Purchase Order which will not be encumbered through the State's accounting system.

GL Acct. Code: Can be left blanked since it is a Purchase Card purchase

Select Update

The screenshot displays a web browser window with the URL <https://training.esmsolutions.com/Requisition/FindRequisitionMasterData>. The page header includes the South Dakota logo and the text "checkout - kathy @ south dakota state government". Navigation tabs include "shop", "cart (0)", "checkout", and "approve". A filter bar shows "selection: Recent" and "sort by: Transaction #".

The main form displays details for Transaction # 011275:

- Transaction Name: 07/15/2014-13-07-Stack-Officer (Demo) [edit](#)
- Create Date: 7/15/2014
- Supplier: Officer (Demo)
- Total Line Items: 2
- Total Value: 51.10 USD
- Payment Form: Credit Card PO
- Release Method: Electronic
- Approval Workflow: Agency Workflow
- External Note: [add attachments](#)
- Internal Note: [add attachments](#)
- Commodity Code: 615 - OFFICE SUP. [edit](#)
- Fiscal Date: 7/15/2014 [edit](#)
- Purchase Order #: 15P001275
- Chart of Accounts: Index Code: [details](#)
- GL Acct. Code: [details](#)

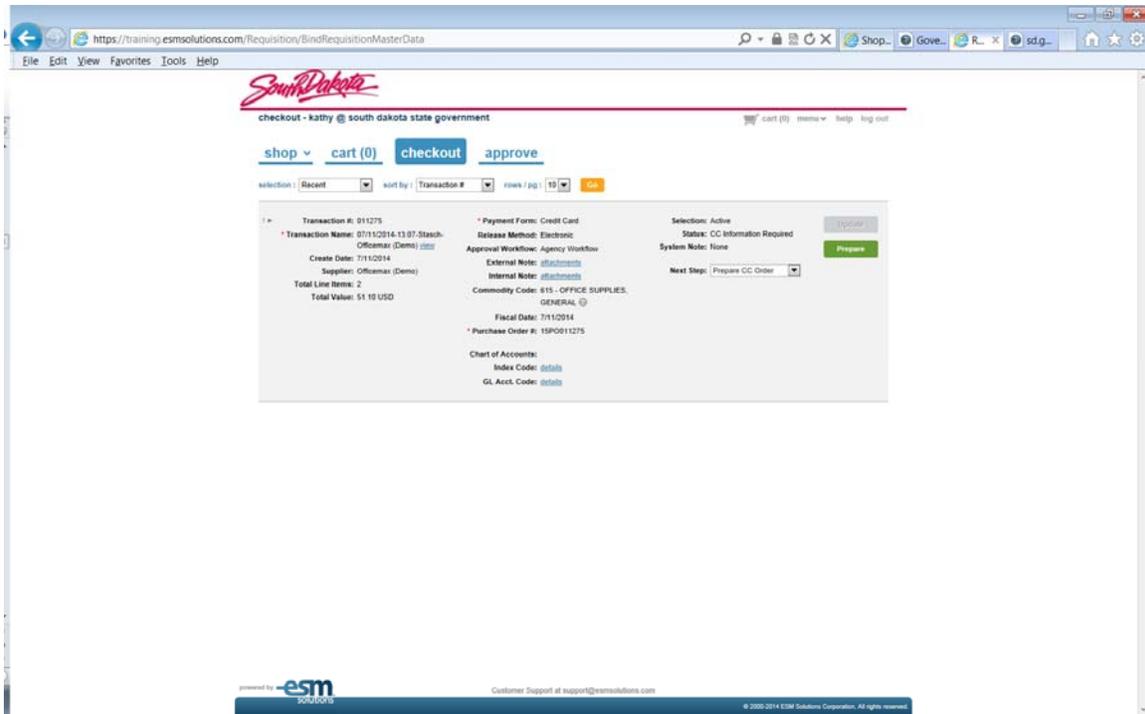
Form controls include "Selection: Active", "Status: Unsubmitted Transaction", "System Note: None", and "Next Step: Request Approval". Buttons for "Update", "Request", and "Cancel" are visible.

Footer text includes "powered by esm solutions", "Customer Support at support@esmsolutions.com", and "© 2002-2014 ESM Software Corporation. All rights reserved."

Select Request

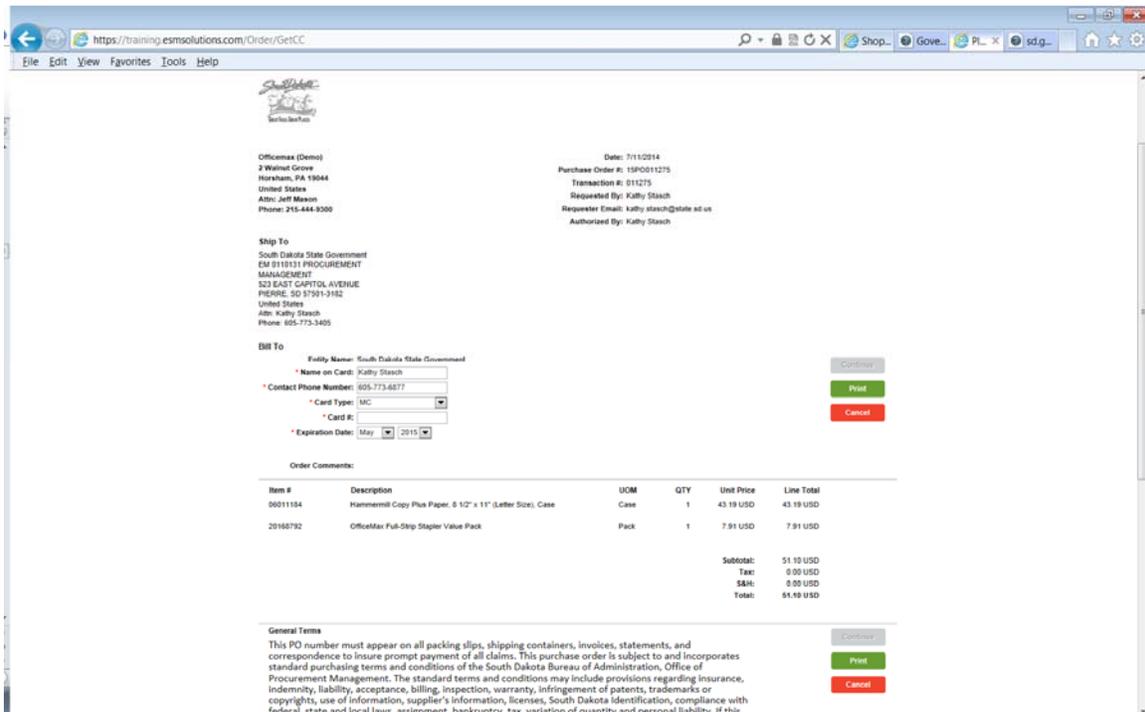
Requisition is now waiting for the Agency approval. When requisition has been approved, the creator of the requisition will receive an email stating the requisition has been approved and they may now write the purchase order and release it.

Select Checkout



Select the proper requisition to be submitted by reviewing the Transaction #, Transaction Name, Supplier and Total Value. You may have more than one requisition that has been approved and needs to be submitted to the vendor.

Select Prepare



Provide the information as described below. The first time you will enter your name, phone number, card type and expiration date; from this point on this information will be retained for future use. Your card # will not be retained. You will always have to enter your card # for each purchase due to federal rules and guidelines.

Name on Card:

Contact Phone Number:

Card Type: **MC**

Card #: Use 555555555554444 when in the training site, otherwise you will submit your actual credit card number in the live production site.

Expiration Date:

Select **Continue**

The screenshot shows a web browser window with the URL <https://training.esmsolutions.com/Order/GetCC>. The page contains a form for entering card information, a table of order items, and a summary of the order total.

Entity Name: South Dakota
* Name on Card: Kelly Strach
* Contact Phone Number: 605-773-6677
* Card Type: MC
* Card #: 5555555555
* Expiration Date: May

This action will result in the order being transmitted to the supplier.
Are you sure you wish to continue?

Place Order Cancel

Continue Print Cancel

Order Comments:

Item #	Description	UCM	QTY	Unit Price	Line Total
0601104	Hammill Copy Plus Paper, 8 1/2" x 11" (Letter Size), Case	Case	1	43.19 USD	43.19 USD
20160792	OfficeMax Full-Step Stapler Value Pack	Pack	1	7.91 USD	7.91 USD

Subtotal: 51.10 USD
Tax: 0.00 USD
SAH: 0.00 USD
Total: 51.10 USD

General Terms
This PO number must appear on all packing slips, shipping containers, invoices, statements, and correspondence to insure prompt payment of all claims. This purchase order is subject to and incorporates standard purchasing terms and conditions of the South Dakota Bureau of Administration, Office of Procurement Management. The standard terms and conditions may include provisions regarding insurance, indemnity, liability, acceptance, billing, inspection, warranty, infringement of patents, trademarks or copyrights, use of information, supplier's information, licenses, South Dakota identification, compliance with federal, state and local laws, assignment, bankruptcy, tax, variation of quantity and personal liability, if this purchase order is the result of a formal or informal solicitation, the terms and conditions attached to that solicitation govern. These terms and conditions may be obtained from the Office of Procurement Management, Foss Building, 503 E. Capitol, Pierre, SD 57501 (605-773-3403). The requirements of the Office of Procurement Management relating to equal employment opportunity are also available from the same source.

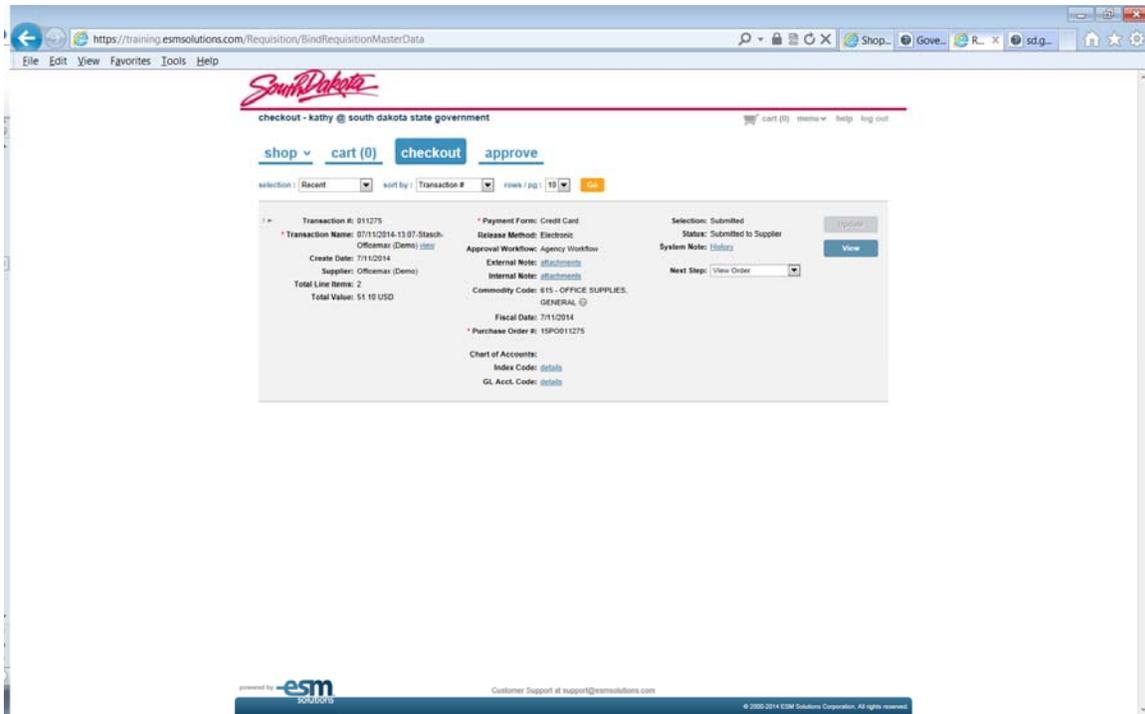
(Fed. Excise Tax) State of SD, BOA, made application and received a validated certificate of registry #46-73-0079-K from US Treasury Dept. IRS, and is qualified for tax free transaction under CH 32 of IRS Code.
Steven L. Berg, Director BOA - Office of Procurement Management

****For State Use Only****

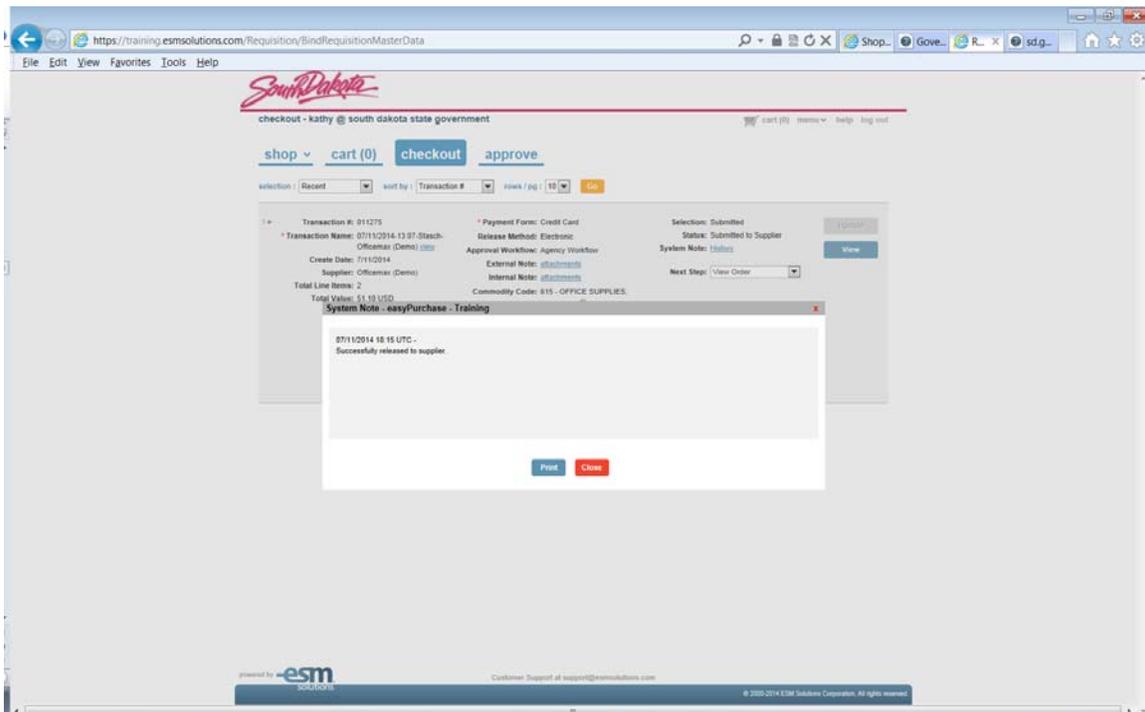
Agency Contact:
Name:
Phone:
Email:
Invoice# _____ Final _____ Partial _____
Date Rec _____ By _____
Coding _____

Continue Print Cancel

Select **Place Order**

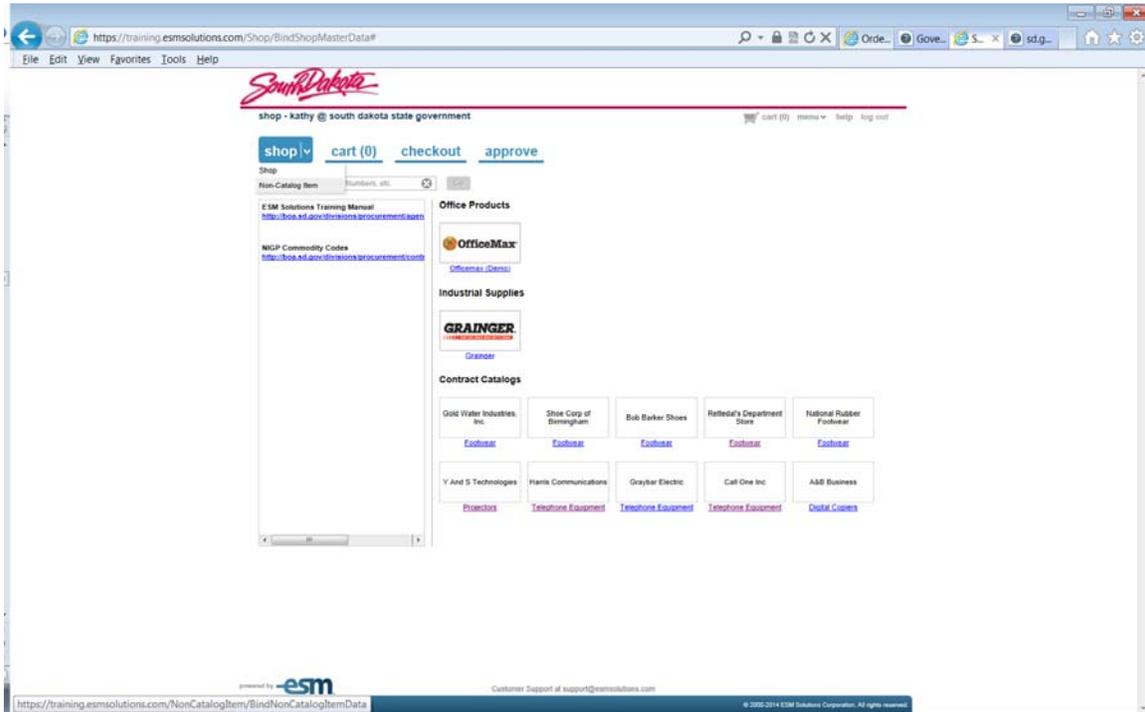


You can then select System Note: **History**
This will allow you to see that your purchase order was successfully released to the supplier.

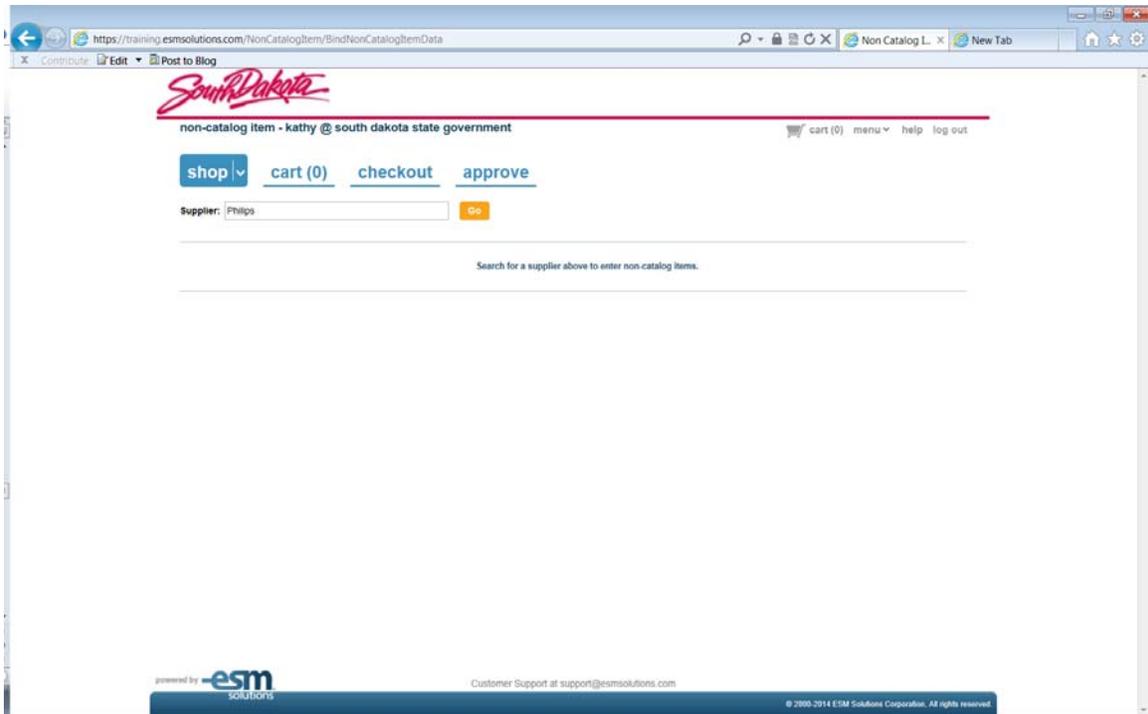


Non-Catalog Item Purchases Under \$4000

Non-Catalog Purchasing Card - Purchases Under \$4000

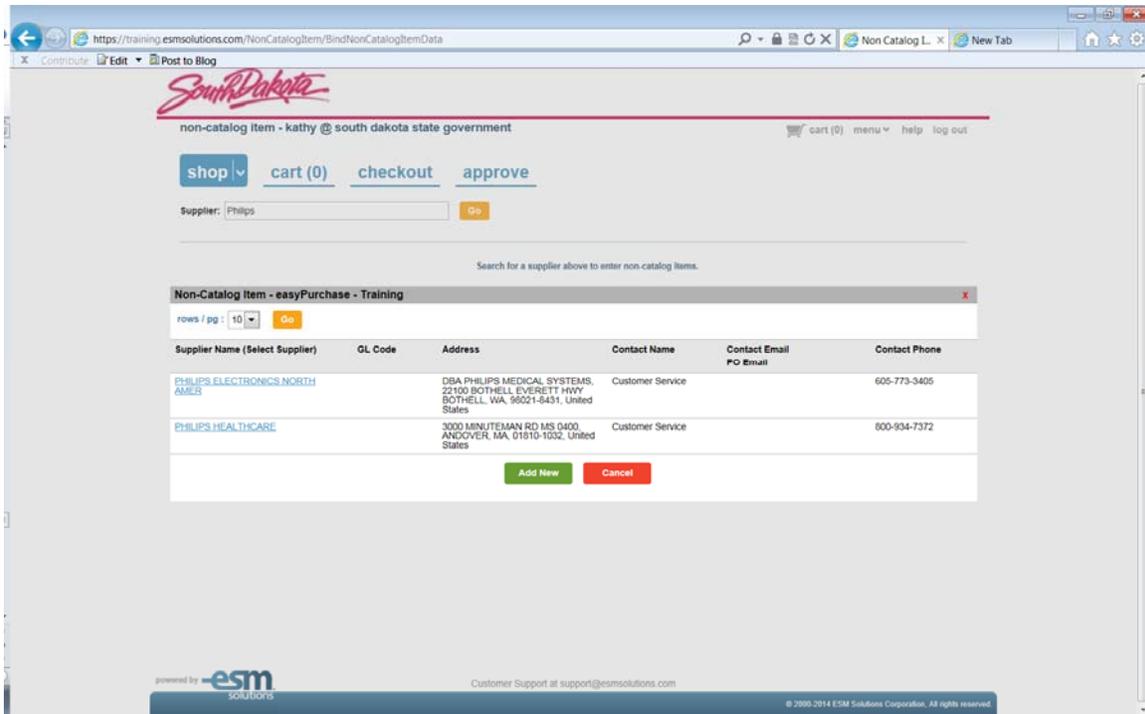


Select **Shop**; then **Non-Catalog Item**

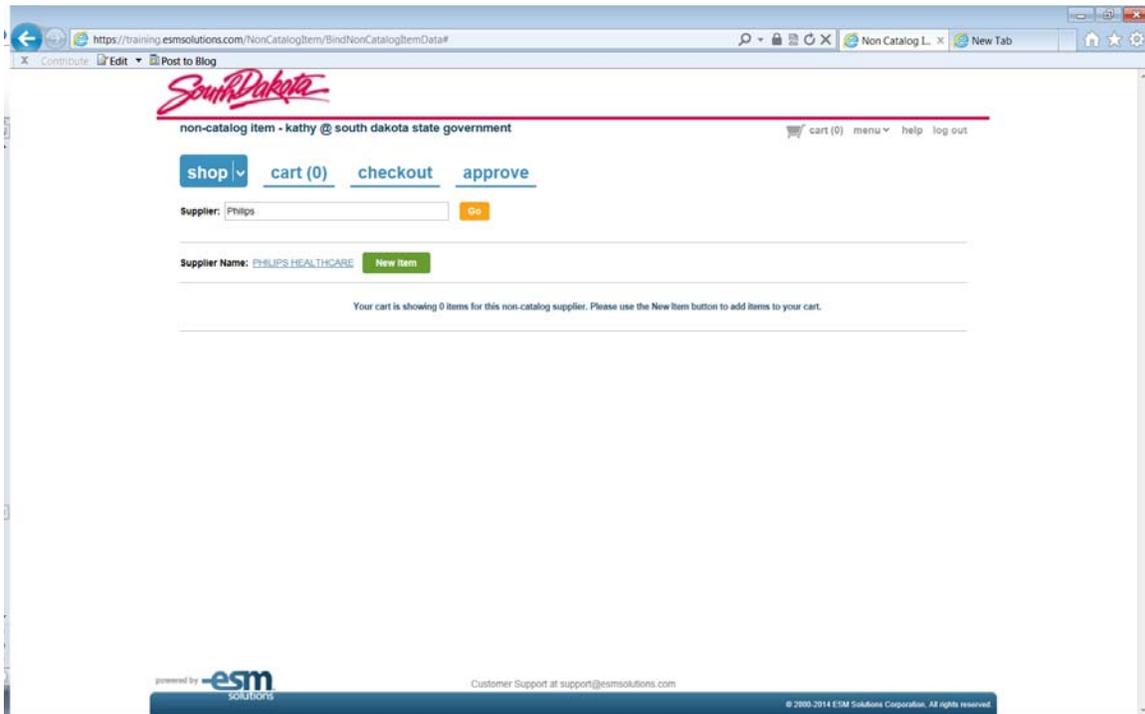


Type in the Supplier Name and select **Go**

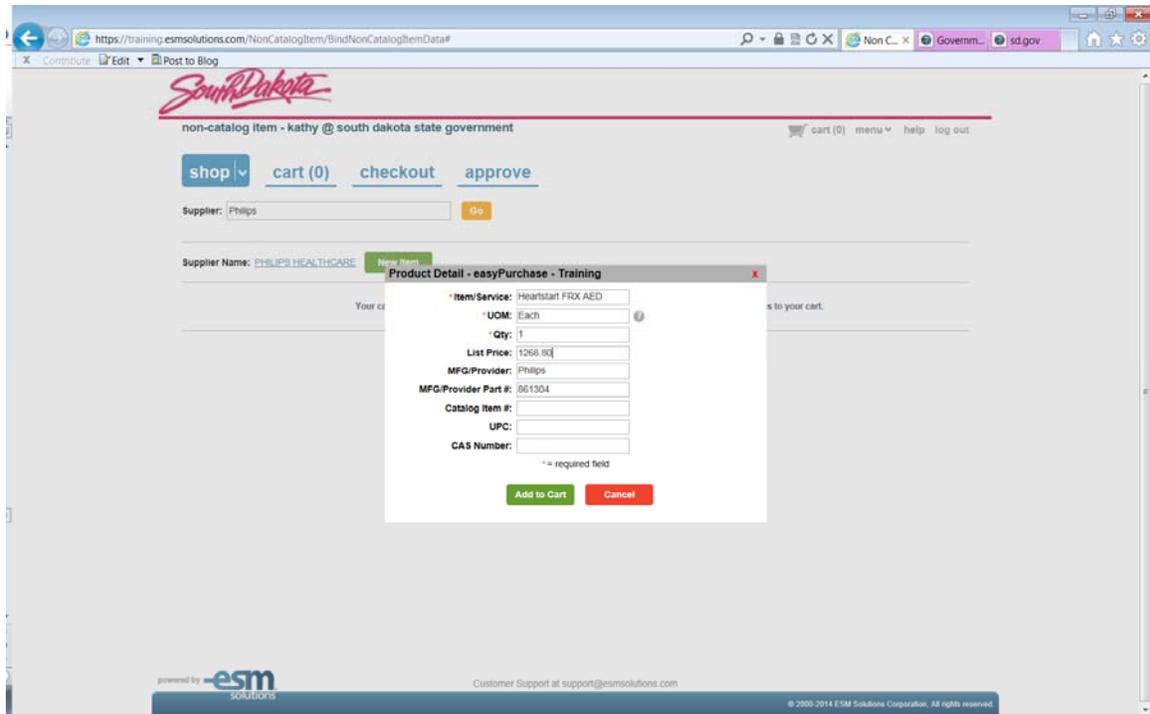
If vendor is not available, search to see if vendor is on the State's Accounting System. If the vendor is not on the State's Accounting System, you will need to get W9 from the vendor and have it added to the State's Accounting System; be sure to check the box to add it as a Purchasing Vendor. The vendor will be available in ESM two days later after it has been added to the State's Accounting System.



Select the Vendor with the proper address of where your order is to be received.



Select New Item



Item Service: Is the name of the product. Provide the name as you see on the vendor's quote. This information will print on the purchase order and will tell the vendor exactly what it is you are ordering.

UOM: Stands for Units of Measure. The default is "Each" but you may change the UOM as per stated on the quote.

Qty: Is the quantity you are purchasing per the UOM.

List Price: Is the price of the item

MFG/Provider: Is the Manufacturer of the product you are ordering

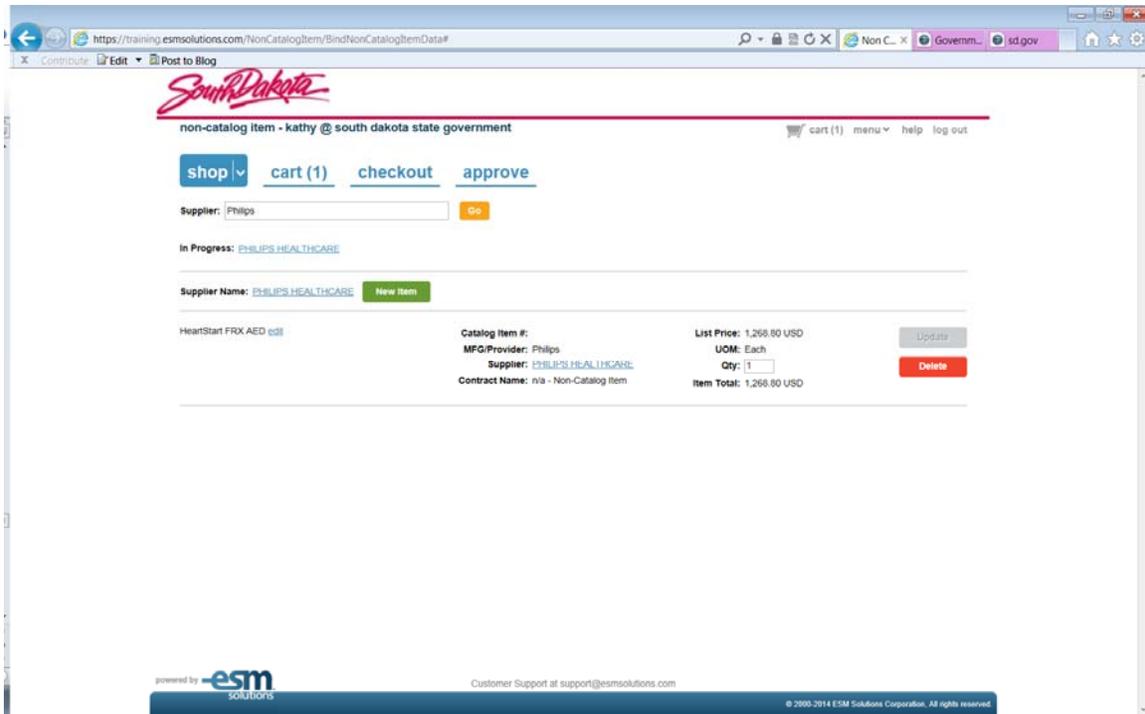
MFG/Provider Part #: Is the vendor's part number for the product you are ordering

Catalog Item #: Is not always provided on a quote and this isn't required if there is no catalog item available on the quote.

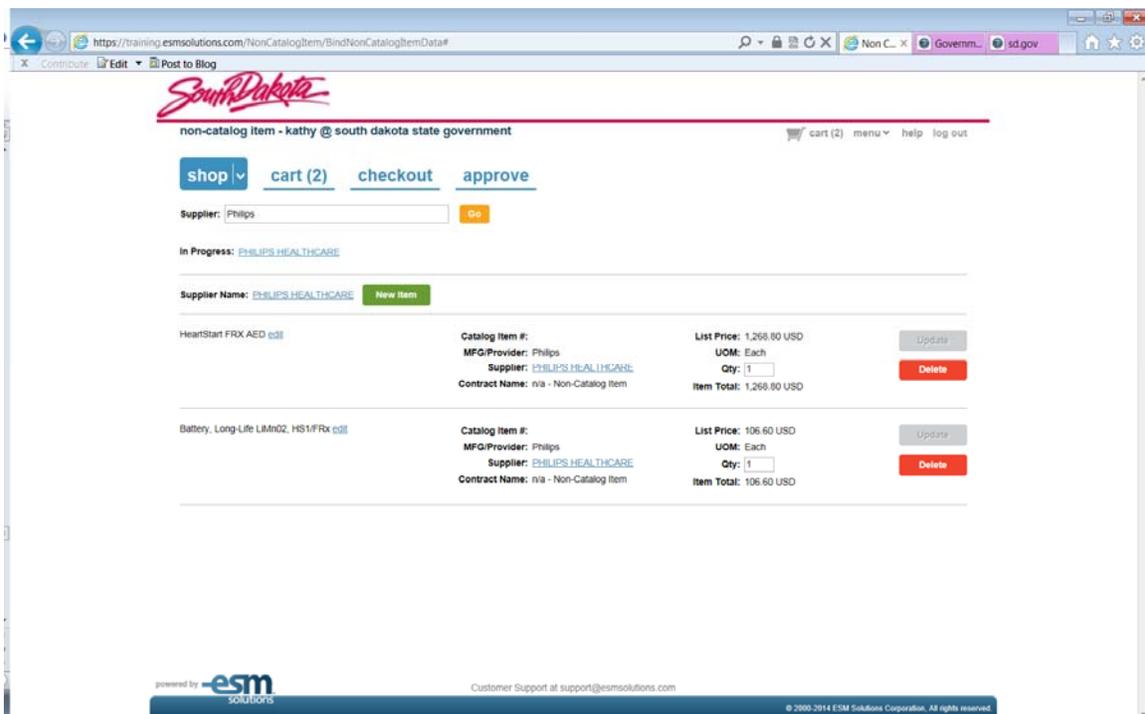
UPC: Stands for Universal Product Code; I don't think you will use this much but if a quote has it listed, then I would add it to the requisition, otherwise, you can leave it blank.

CAS Number: Stands for Chemical Registry Service. This is a unique numerical identifier assigned by Chemical Abstracts Service to every chemical substance. More than likely this will not apply and you can leave it blank.

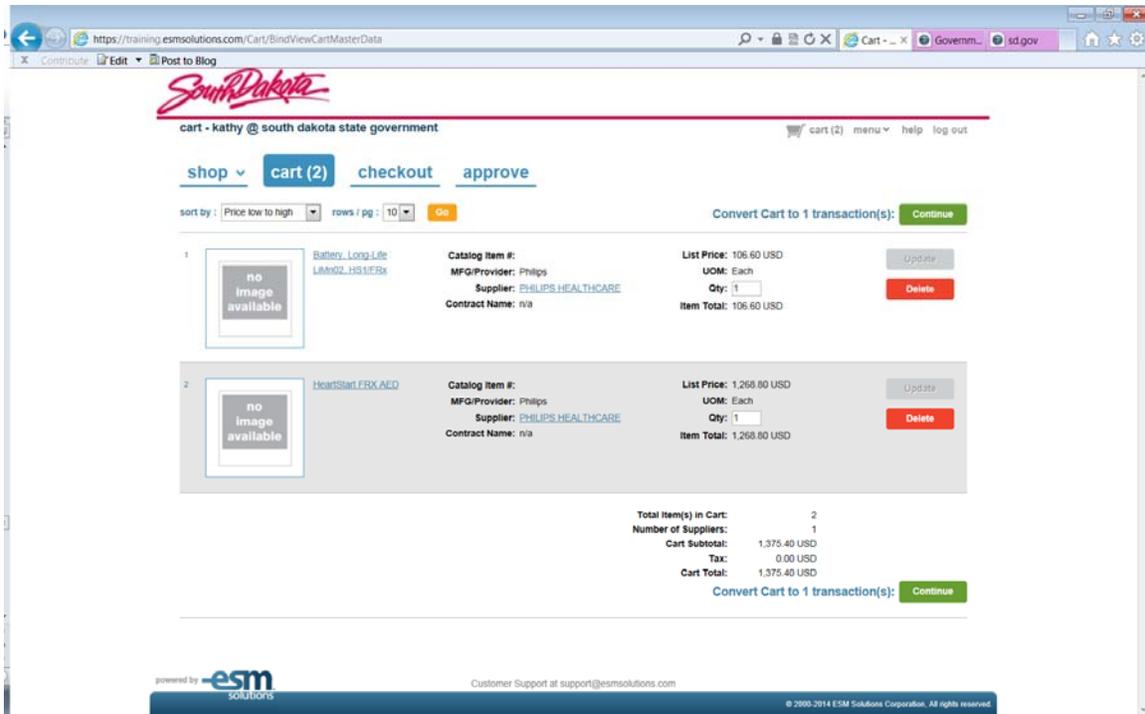
Select **Add to Cart**



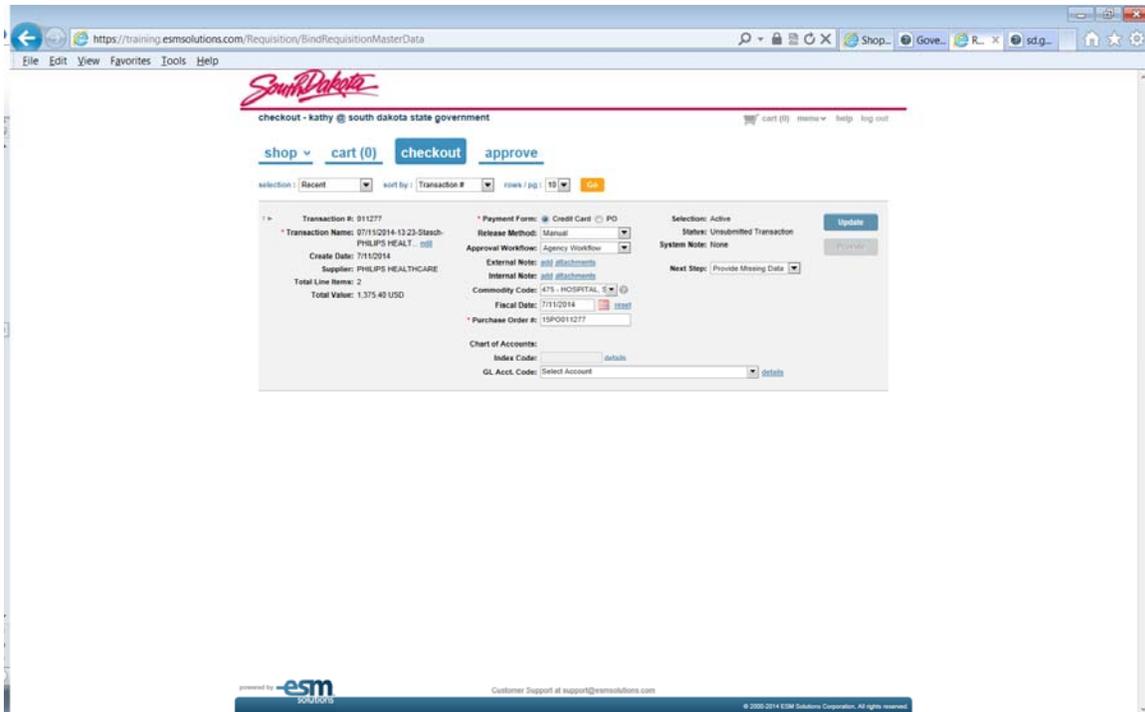
Select **New Item** if you have another item to add to the requisition; fill out the information just as described above.



Select **Cart(2)** when you have added all of your items to purchase. Your cart quantity will vary with the number of items you are purchasing. When your cart reaches over 99 items, the cart will state 99+.



Select **Continue**



Payment Form: **Credit Card**

Release Method: **Manual** Only the Punch-Out Catalogs for now will be sent out as an electronic purchase order.

Approval Workflow: **Agency Workflow**

External Note: External Note is information or instructions to the vendor. This information will be printed on the purchase order.

Internal Note: Internal Note is information that can be viewed only by the State Agency and Office of Procurement Management. Information you may want to provide is who the item is for or any other information you may find pertinent to the requisition.

NIGP Code Required: Select a code that comes closes to what you are purchasing.

Purchase Order #: 15PO + the last 6 digits of the Transaction # such as **15PO011277**
This is referred to as a Local Purchase Order which will not be encumbered through the State's accounting system.

GL Acct. Code: Can be left blanked since it is a Purchase Card purchase

Select **Update**

Select **Request**

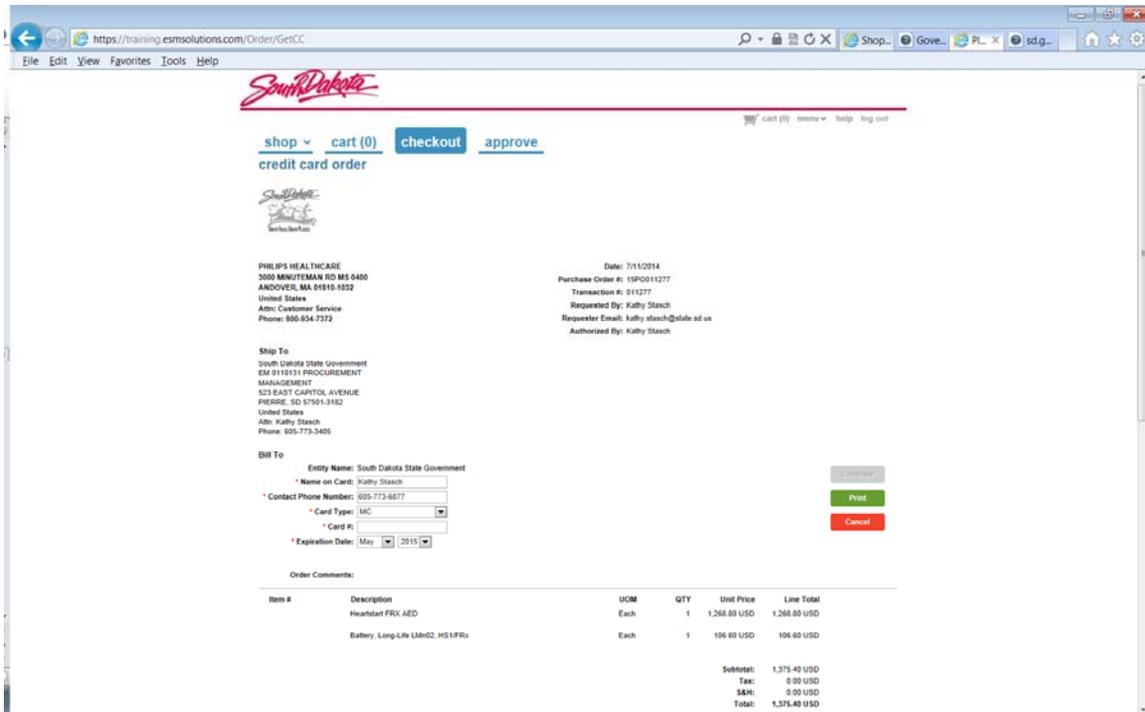
Requisition is now waiting for the Agency approval. When requisition has been approved, the creator of the requisition will receive an email stating the requisition has been approved and they may now write the purchase order and release it.

Select **Checkout**

Select the proper requisition to be submitted by reviewing the Transaction #, Transaction Name, Supplier and Total Value. You may have more than one requisition that has been approved and needs to be submitted to the vendor.

The screenshot shows a web browser window with the URL <https://training.esmsolutions.com/Requisition/BindRequisitionMasterData>. The page header includes the South Dakota logo and the text "checkout - kathy @ south dakota state government". Below the header, there are navigation tabs: "shop", "cart (0)", "checkout" (which is active), and "approve". A "selection" dropdown is set to "Recent", and the "sort by" is set to "Transaction #". The main content area displays details for a transaction with ID 011277. The details are organized into several sections: Transaction Name (07/15/2014.13.23-Statsh-PHELPS HEALT...), Create Date (7/15/2014), Supplier (PHILIPS HEALTHCARE), Total Line Items (2), and Total Value (1,375.48 USD). Other sections include Payment Form (Credit Card), Release Method (Manual), Approval Workflow (Agency Workflow), External Note, Internal Note, Commodity Code (475 - HOSPITAL, SURGICAL, AND MEDICAL...), Fiscal Date (7/15/2014), and Purchase Order # (15PO011277). On the right side, there are fields for Selection (Active), Status (CC Information Required), System Note (None), and Next Step (Prepare CC Order). A "Prepare" button is visible at the bottom right of the details section. The footer of the page includes the ESM Solutions logo, customer support information, and a copyright notice for 2002-2014 ESM Solutions Corporation.

Select **Prepare**



Provide the information as described below. The first time you will enter your name, phone number, card type and expiration date; from this point on this information will be retained for future use. Your card # will not be retained. You will always have to enter your card # for each purchase due to federal rules and guidelines.

Name on Card:

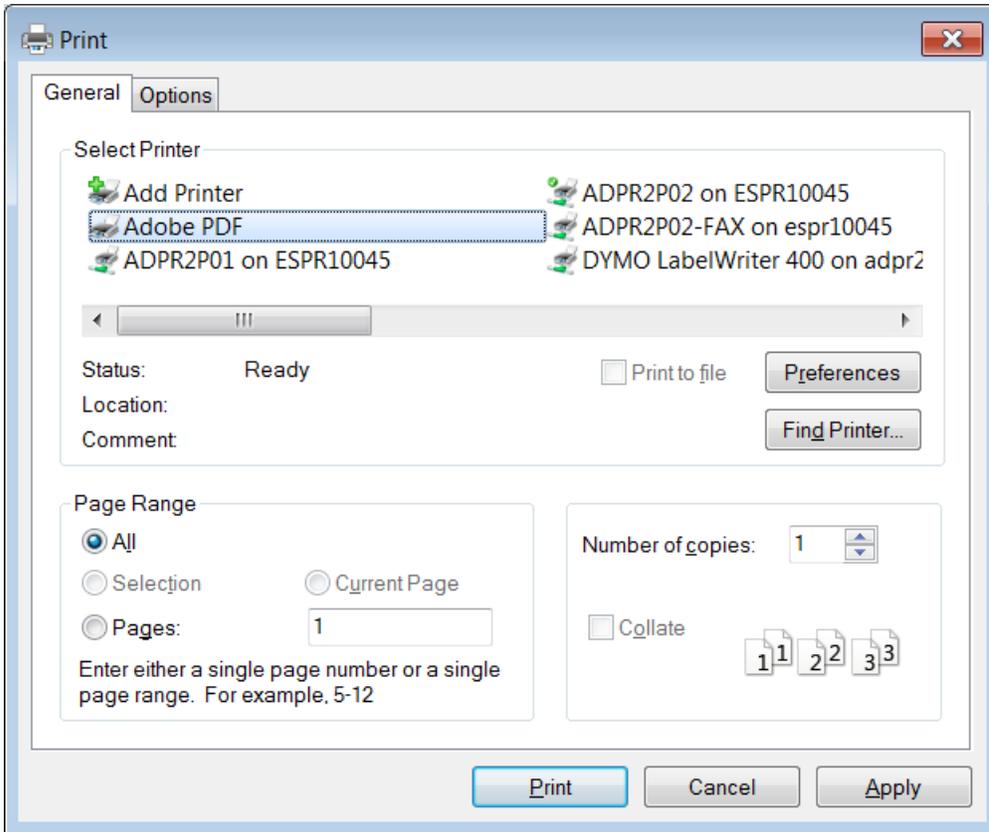
Contact Phone Number:

Card Type: **MC**

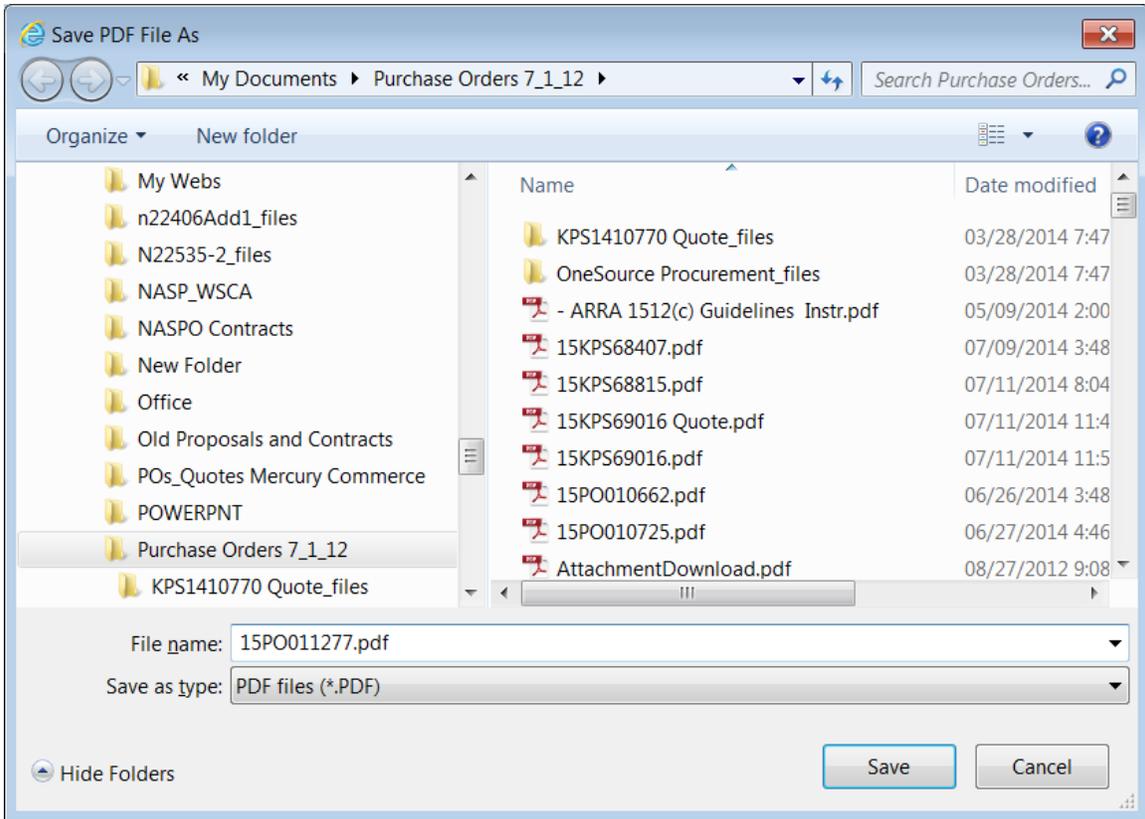
Card #: Use 5555555555554444 when in the training site, otherwise you will submit your actual credit card number in the live production site.

Expiration Date:

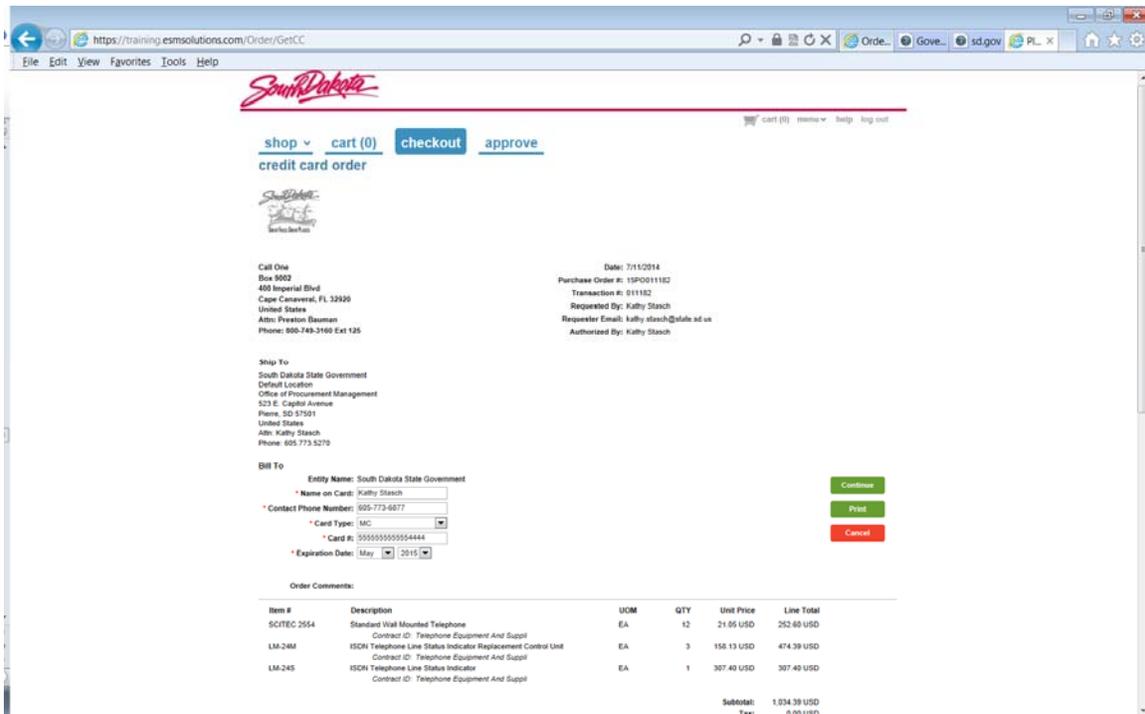
Select **Print**



Select **Adobe PDF**, **Print and Save** in the file location you created for Purchase Orders. Name the file with the Local Purchase Number such as **15PO01127**.



After saving the file close the Adobe purchase order and print screen.



Select **Continue**

South Dakota

shop cart (0) checkout approve

credit card order

Call One
Box 9602
400 Imperial Blvd
Cape Canaveral, FL 32930
United States
Attn: Preston Bauman
Phone: 800-748-3100 Ext 125

Date: 7/15/2014
Purchase Order #: 15PO011182
Transaction #: 011182
Requested By: Kathy Stasch
Requester Email: kathy.stasch@state.sd.us
Authorized By: Kathy Stasch

Submit Order - easyPurchase - Training

This action will result in the order being transmitted to the supplier.
Are you sure you wish to continue?

Place Order Cancel

Ship To
South Dakota State Government
Default Location
Office of Procurement Management
523 E. Capitol Avenue
Pierre, SD 57501
United States
Attn: Kathy Stasch
Phone: 605.773.5270

Bill To
Entity Name: South Dakota State Government
* Name on Card: Kathy Stasch
* Contact Phone Number: 605-773-6677
* Card Type: MC
* Card #: 5555555555554444
* Expiration Date: May 2015

Continue
Print
Cancel

Order Comments:

Item #	Description	UOM	QTY	Unit Price	Line Total
SCITEC 2554	Standard Wall Mounted Telephone Contract ID: Telephone Equipment And Suppl	EA	12	21.55 USD	258.60 USD
LM-24M	ISDN Telephone Line Status Indicator Replacement Control Unit Contract ID: Telephone Equipment And Suppl	EA	3	158.13 USD	474.39 USD
LM-24S	ISDN Telephone Line Status Indicator Contract ID: Telephone Equipment And Suppl	EA	1	307.40 USD	307.40 USD
				Subtotal:	1,034.39 USD
				Tax:	0.00 USD

Select **Place Order** The order will not go to the vendor because you selected Manual and not Electronic. But you have to do this final step to complete the order.

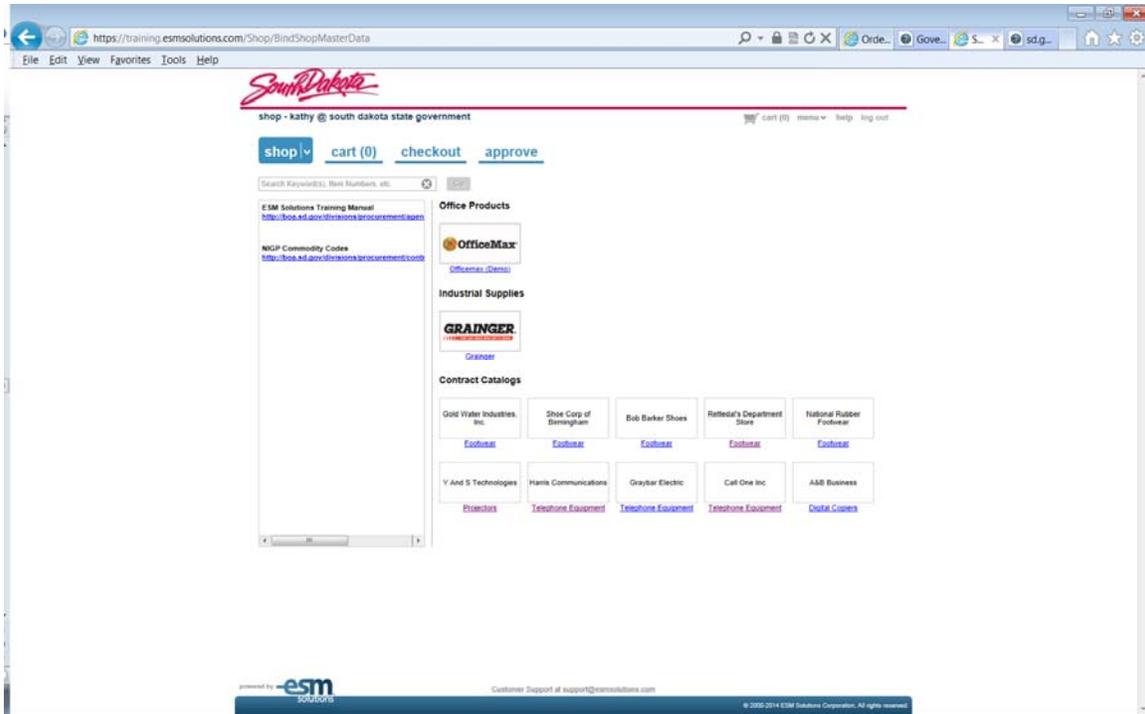
Send a copy of the purchase order as an attachment, in an email, to the vendor, and request a confirmation from the vendor that they received the purchase order.

Non-Catalog Direct Voucher - Purchases Under \$4000

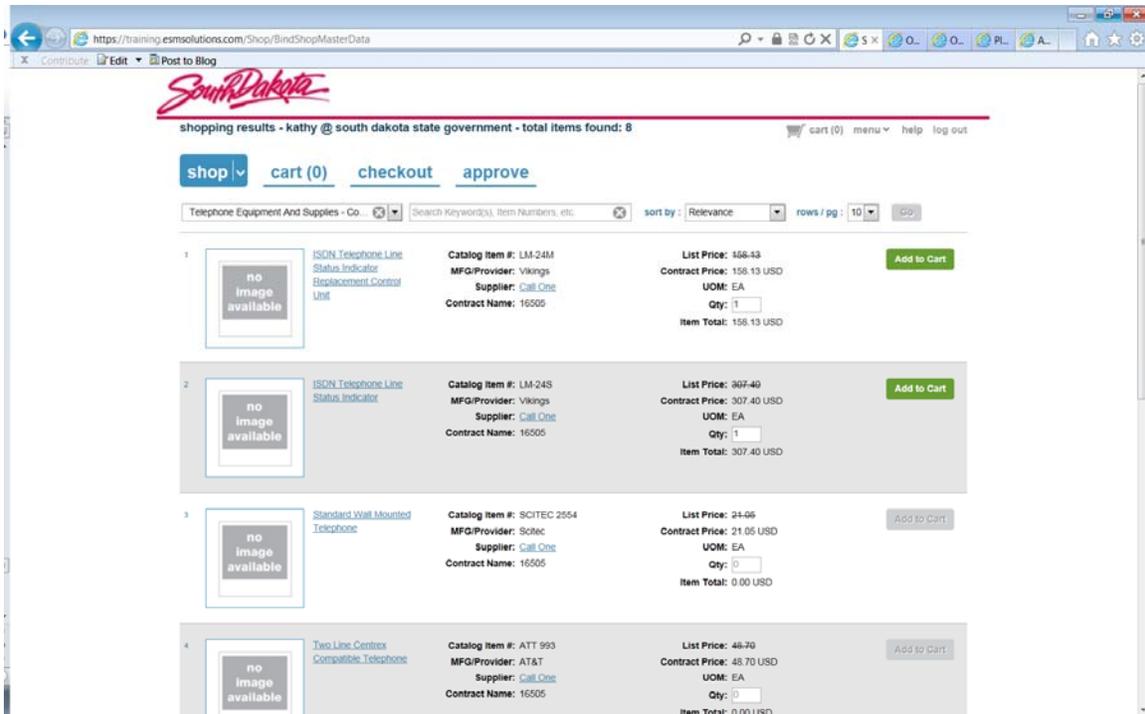
Follow all the steps as listed with *Non-Catalog Purchasing Card - Purchases Under \$4000* starting with page 12 but you will Select **PO** instead of Credit Card, **Release**, **Print** and **Continue**; you will not need to fill out the credit card information.

Contract Catalog Item Purchases Under \$4000

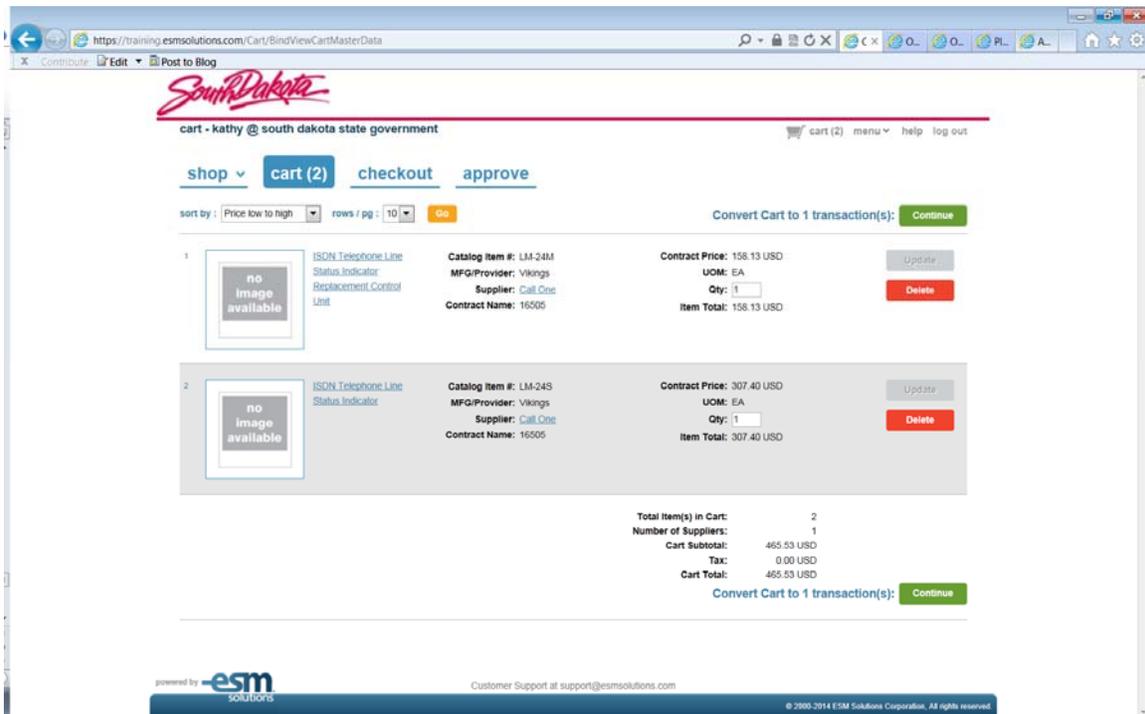
Contract Catalog Purchasing Card - Purchases Under \$4000



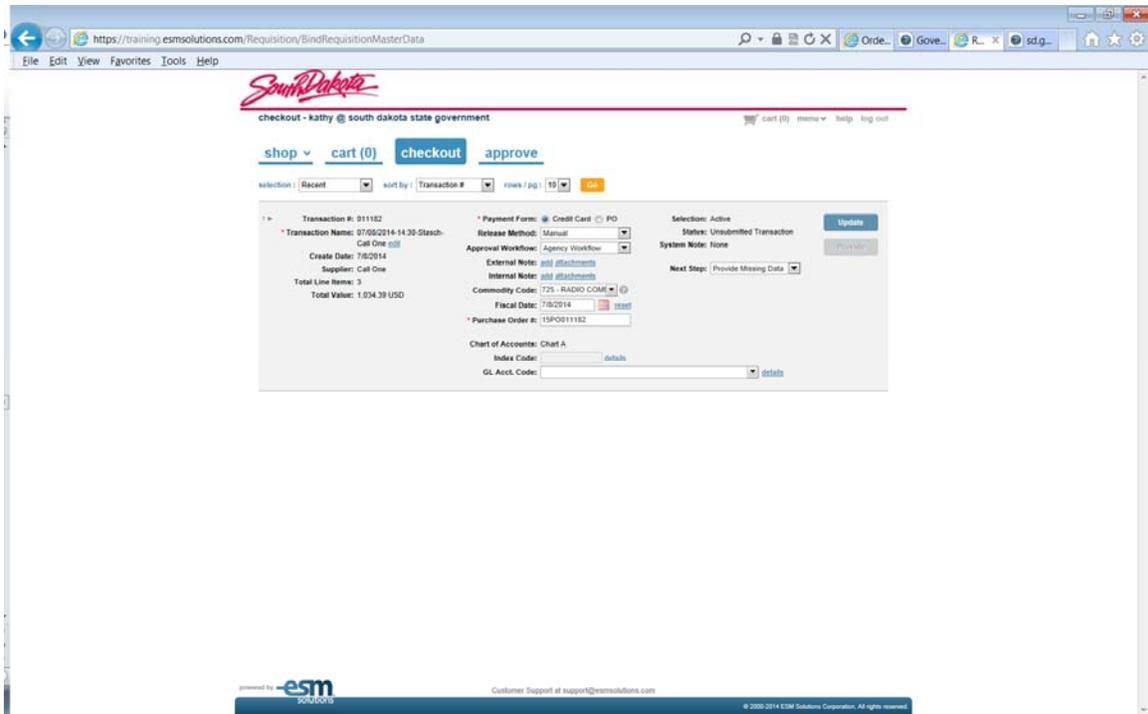
Select the Contract Catalog from the list of catalogs listed under the Contract Catalogs of the product you wish to purchase.



Find the item(s) you wish to purchase; enter the quantity and Select **Add to Cart and Cart(2)**



Review your cart; make any changes you need and Select **Continue**



Payment Form: **Credit Card**

Release Method: **Manual**

Only the Punch-Out Catalogs for now will be sent out as an electronic purchase order.

Approval Route: **Agency Workflow**

External Note: External Note is information or instructions to the vendor. This information will be printed on the purchase order.

Internal Note: Internal Note is information that can be viewed only by the State Agency and Office of Procurement Management. Information you may want to provide is who the item is for or any other information you may find pertinent to the requisition.

NIGP Code Required: Select a code that comes closes to what you are purchasing.

Purchase Order #: 15PO + the last 6 digits of the Transaction # such as **15PO011182**

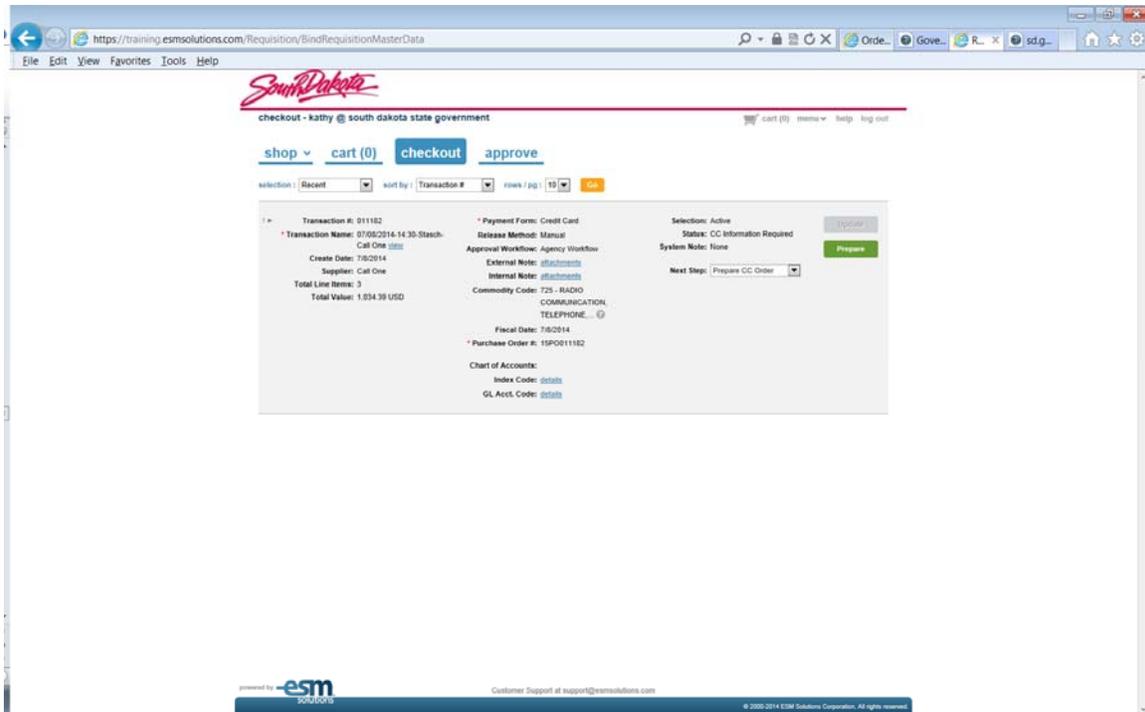
This is referred to as a Local Purchase Order which will not be encumbered through the State's accounting system.

GL Acct. Code: Can be left blanked since it is a Local Purchase order

Select **Update**

Select **Request**

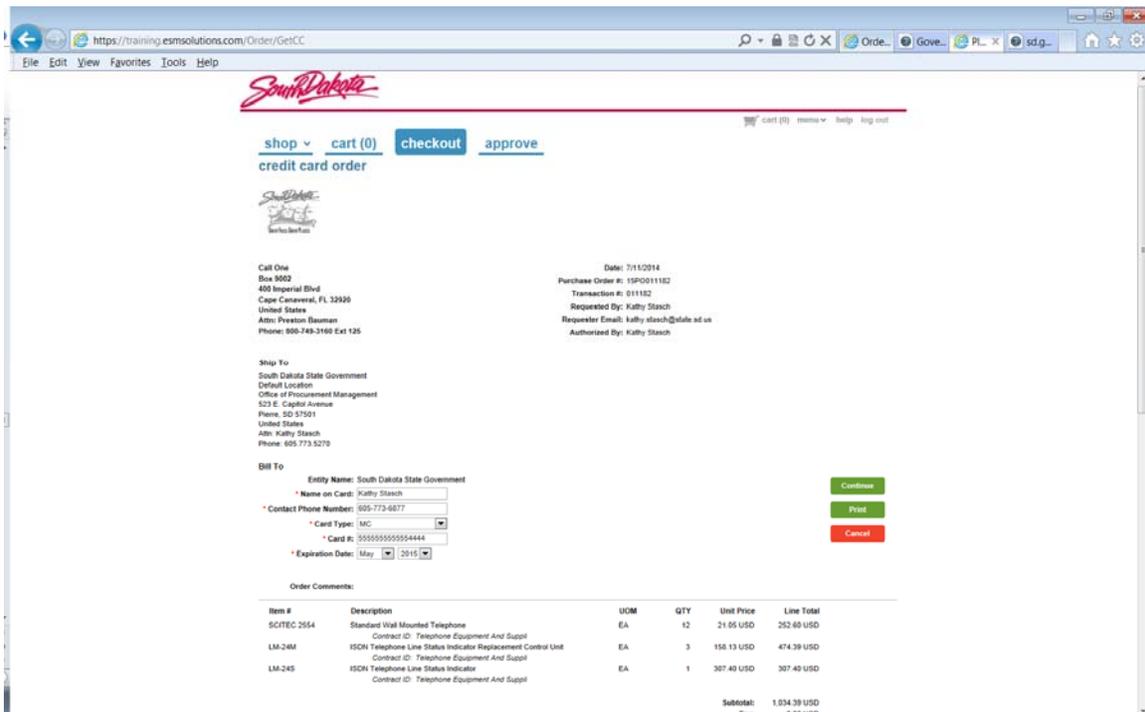
Requisition is now waiting for the Agency approval. When requisition has been approved, the creator of the requisition will receive an email stating the requisition has been approved and they may now write the purchase order and release it.



Select **Checkout**

Select the proper requisition to be submitted by reviewing the Transaction #, Transaction Name, Supplier and Total Value. You may have more than one requisition that has been approved and needs to be submitted to the vendor.

Select **Prepare**



Provide the information as described below. The first time you will enter your name, phone number, card type and expiration date; from this point on this information will be retained for future use. Your card # will not be retained. You will always have to enter your card # for each purchase due to federal rules and guidelines.

Name on Card:

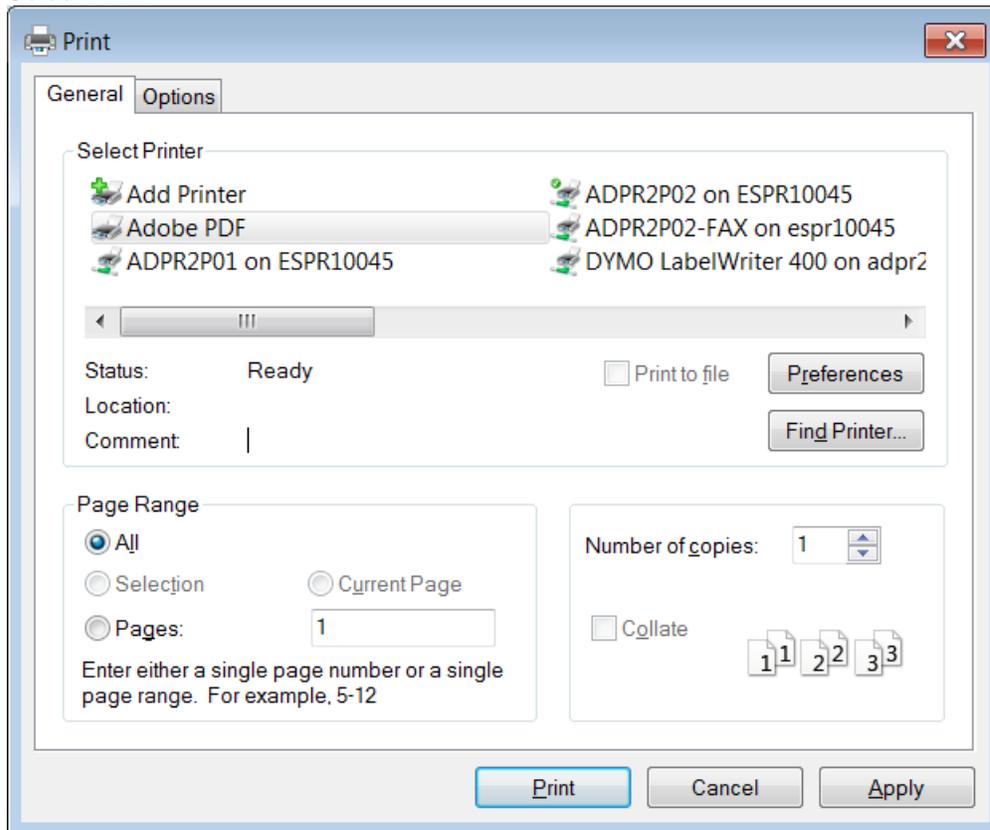
Contact Phone Number:

Card Type: **MC**

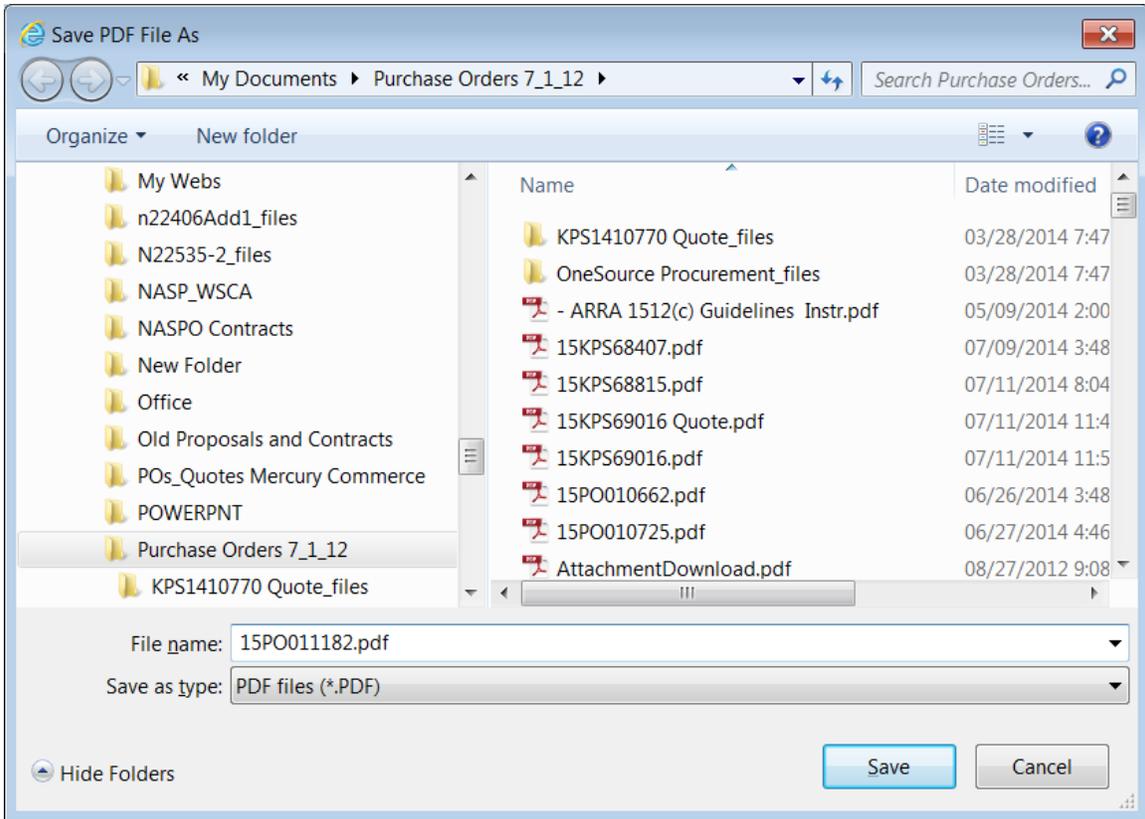
Card #: Use 555555555554444 when in the training site, otherwise you will submit your actual credit card number in the live production site.

Expiration Date:

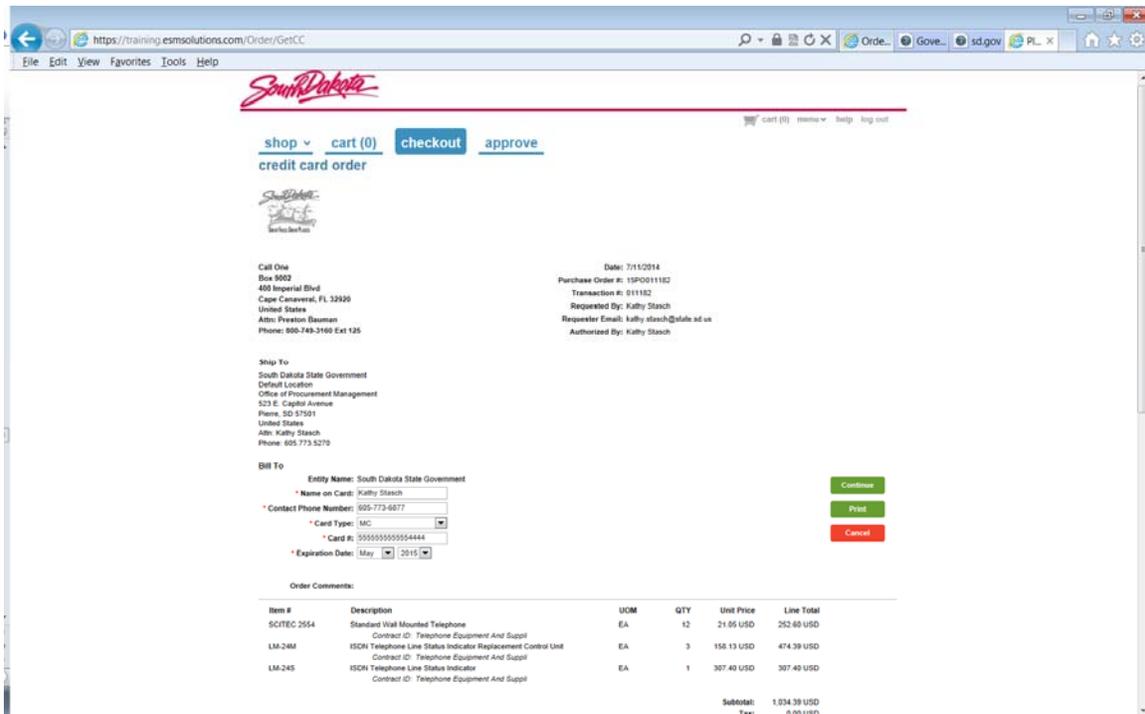
Select Print



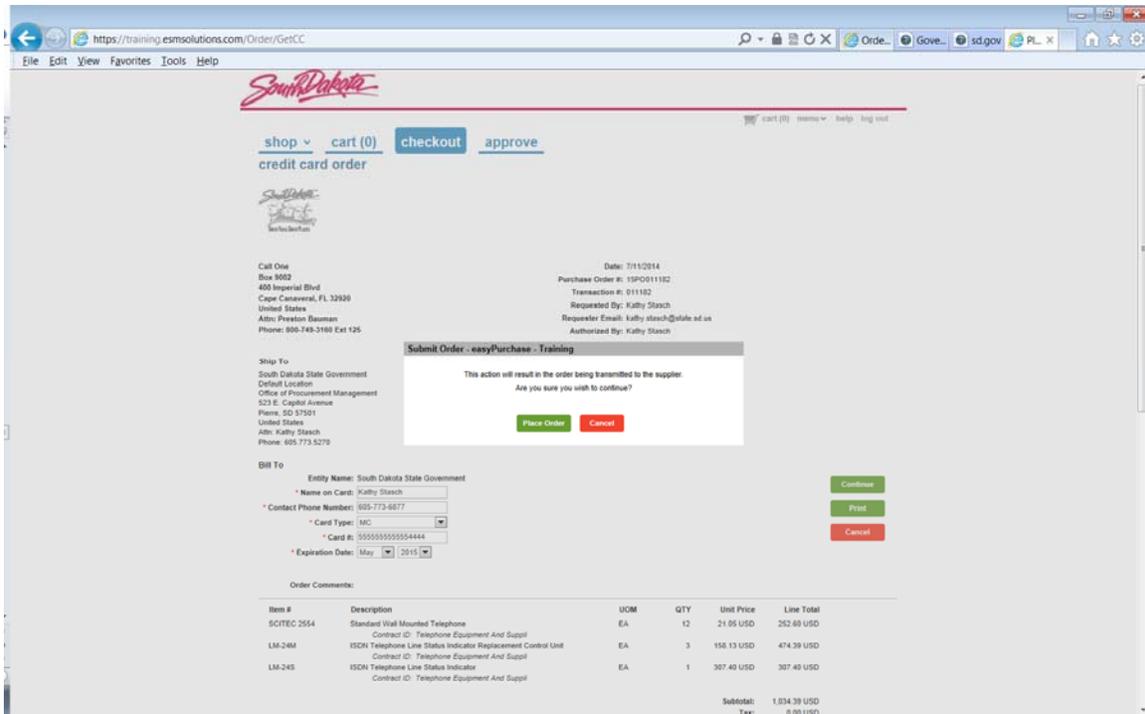
Select **Adobe PDF, Print and Save** in the file location you created for Purchase Orders. Name the file with the Local Purchase Number such as **15PO011182**.



After saving the file close the Adobe purchase order and print screen.



Select **Continue**



Select **Place Order** The order will not go to the vendor because you selected Manual and not Electronic; you have to do this final step to complete the order.

Send a copy of the purchase order as an attachment, in an email, to the vendor, and request a confirmation from the vendor that they received the purchase order.

Contract Catalog Direct Voucher - Purchases Under \$4000

Follow all the steps as listed under [Contract Catalog Purchasing Card - Purchases Under \\$4000](#) starting with page 24 but you will Select **PO** instead of Credit Card, **Release**, **Print** and **Continue**; you will not need to fill out the credit card information.

Encumbrances of Non Contract and Contract Item Purchases Under \$4000

Encumbered Purchases - Purchases Under \$4000

This is assuming you have added items to your cart and are ready to checkout; for instructions on selecting and adding items to your cart see page 1. The instructions below are starting from **Checkout** after you have added items to your cart.

The screenshot displays the checkout page of the ESM Solutions system. At the top, the user is identified as 'kathy @ south dakota state government'. The navigation bar includes 'shop', 'cart (0)', 'checkout', and 'approve'. The 'checkout' tab is active. Below the navigation, there are filters for 'Recent' and 'Transaction #'. The main content area shows a transaction summary for Transaction # 011200. Key details include: Release Method: Manual, Approval Workflow: Encumbrance To OPM, Payment Form: PO, and Total Value: 1,522.00 USD. The interface also shows options for adding external and internal notes, and a 'Next Step' of 'Provide Missing Data'. The bottom of the page features the ESM Solutions logo and copyright information for 2014.

Payment Form: **PO**

Release Method: **Manual**

Only the Punch-Out Catalogs for now will be sent out as an electronic purchase order.

Approval Workflow: **Encumbrance To OPM**

Your agency approvers will still receive the requisition to be approved. When the agency has finished the approval stage the requisition will then be routed to OPM for approval and for a purchase order to be written through the State's Accounting System.

External Note: External Note is information or instructions to the vendor. This information will be printed on the purchase order.

Internal Note: Add quote(s) within the Attachment Internal Note is information that can be viewed only by the State Agency and Office of Procurement Management. Information you may want to provide is who the item is for or any other information you may find pertinent to the requisition.

NIGP Code Required: [Select a code that comes closes to what you are purchasing.](#)

Purchase Order #: Enter the Transaction # **011280**.

GL Acct. Code: [You will need to select the proper account code since this will be encumbered through the State's Accounting System](#)

Select **Update**

Select **Request**

The requisition will be approved by the agency workflow and the OPM Encumbrance Workflow.

OPM will then process the requisition into a purchase order and the ordering process has been completed.

You will receive an email message from ESM Solutions stating the Transaction is complete and that you must now share a copy of the purchase order to the Supplier/Vendor. **DO NOT** send a copy of this purchase order to the Supplier/Vendor. OPM will send a copy to the Supplier/Vendor and to the Agency Contact Person.

Example of Email from ESM Solutions:



Encumbrances of Non Contract and Contract Item Purchases >=\$4000

Non Catalog and Contract Purchases >=\$4000 – Office of Procurement Management Purchase Order

This is assuming you have added items to your cart and are ready to checkout; for instructions on selecting and adding items to your cart see page 1. The instructions below are starting from **Checkout** after you have added items to your cart.

The screenshot shows a web browser window displaying the checkout page for a transaction. The URL is https://training.esmsolutions.com/Requisition/BindRequisitionMasterData. The page header includes the South Dakota logo and the user 'checkout - kathy @ south dakota state government'. The navigation bar has 'shop', 'cart (0)', 'checkout', and 'approve' buttons. Below the navigation, there are filters for 'selection' (Recent) and 'sort by' (Transaction #). The main content area shows transaction details for Transaction # 011200, Transaction Name 07/11/2014 14:37: Stasch-A&B Business, Create Date 7/11/2014, Supplier AM Business, Total Line Items 2, and Total Value 5,520.00 USD. The 'Payment Form' is set to 'Credit Card' and 'PO'. The 'Release Method' is 'Manual'. The 'Approval Workflow' is 'Agency Workflow'. The 'External Note' is 'all attachments'. The 'Internal Note' is 'all attachments'. The 'Commodity Code' is '600 - OFFICE MAC'. The 'Fiscal Date' is '7/11/2014'. The 'Purchase Order #' is '011200'. The 'Chart of Accounts' is 'Chart A'. The 'Index Code' is 'default'. The 'GL Acct. Code' is '1000-5290100000000000-0901001'. The 'Next Step' is 'Request Approval'. The 'Status' is 'Unsubmitted Transaction'. The 'System Note' is 'None'. The 'Update' and 'Purchase' buttons are visible. The footer includes the ESM Solutions logo and the text 'Customer Support at support@esmsolutions.com' and '© 2000-2014 ESM Solutions Corporation. All rights reserved'.

Payment Form: **PO**

Release Method: **Manual**

Only the Punch-Out Catalogs for now will be sent out as an electronic purchase order.

Approval Workflow: **Agency Workflow**

Select Agency Workflow when the dollar amount **is equal to or greater than** \$4000. The requisition will automatically be routed to OPM for approval and for a purchase order to be written through the State's Accounting System.

Use Encumbered to OPM only when the dollar amount **is less than** \$4000 and you want it written through the State's Accounting System.

External Note: External Note is information or instructions to the vendor. This information will be printed on the purchase order.

Internal Note: Add quote(s) within the Attachment Internal Note is information that can be viewed only by the State Agency and Office of Procurement Management. Information you may want to provide is who the item is for or any other information you may find pertinent to the requisition.

NIGP Code Required: Select a code that comes closes to what you are purchasing.

Purchase Order #: Enter the Transaction # **011280**.

GL Acct. Code: You will need to select the proper account code since this will be encumbered through the State's Accounting System

Select **Update**

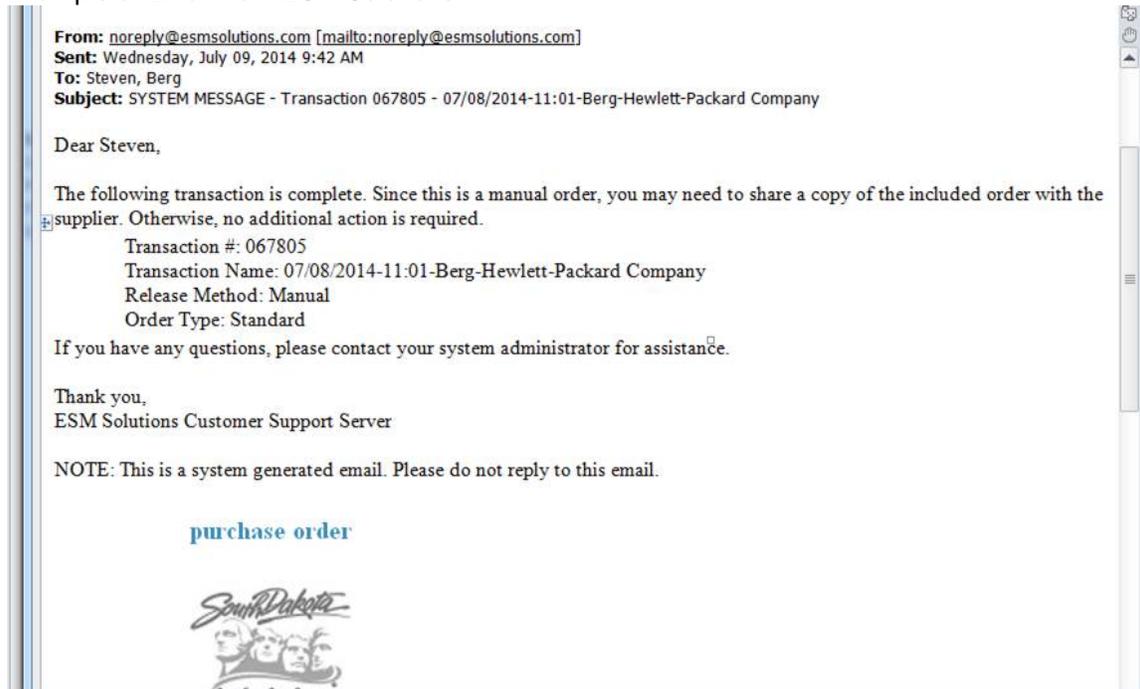
Select **Request**

The requisition will be approved by the agency workflow and the OPM Encumbrance Workflow.

OPM will then process the requisition into a purchase order and the ordering process has been completed.

You will receive an email message from ESM Solutions stating the Transaction is complete and that you must now share a copy of the purchase order to the Supplier/Vendor. **DO NOT** send a copy of this purchase order to the Supplier/Vendor. OPM will send a copy to the Supplier/Vendor and to the Agency Contact Person.

Example of Email from ESM Solutions:

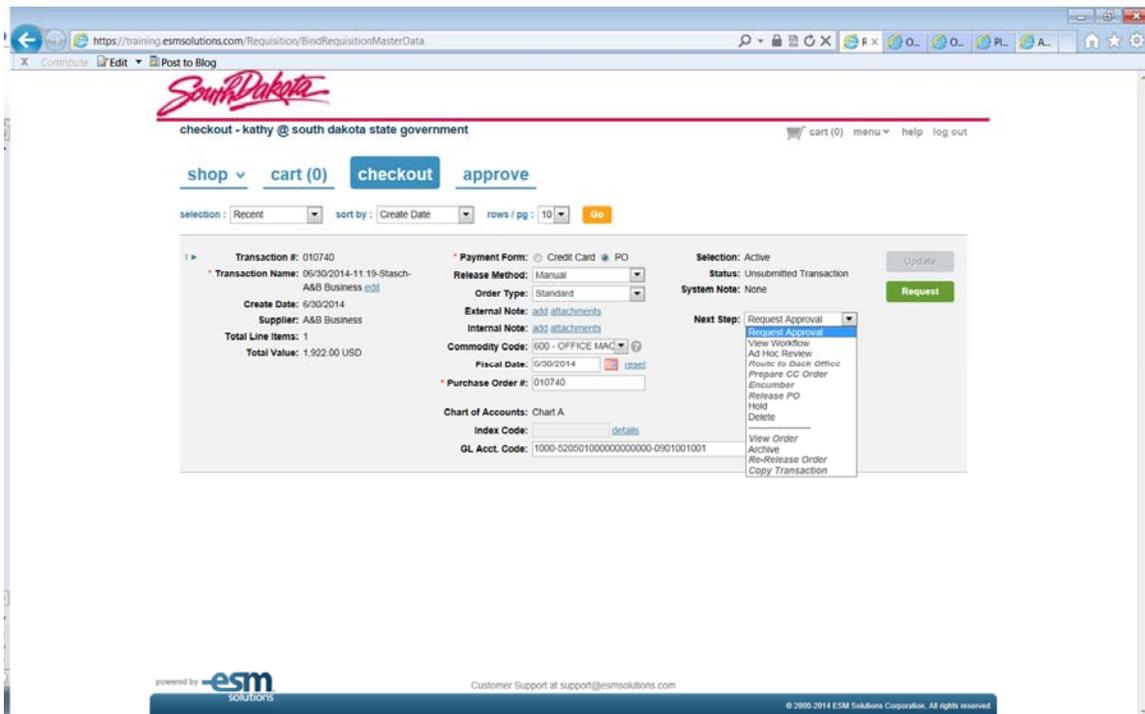


How to add an individual to a requisition for review – Ad Hoc

An individual can be added to a requisition for reviewing purposes only such as a Manager. The added individual will not be able to make any changes to the requisition; they can only view the requisition. The added individual will see the requisition before the purchase order has been written.

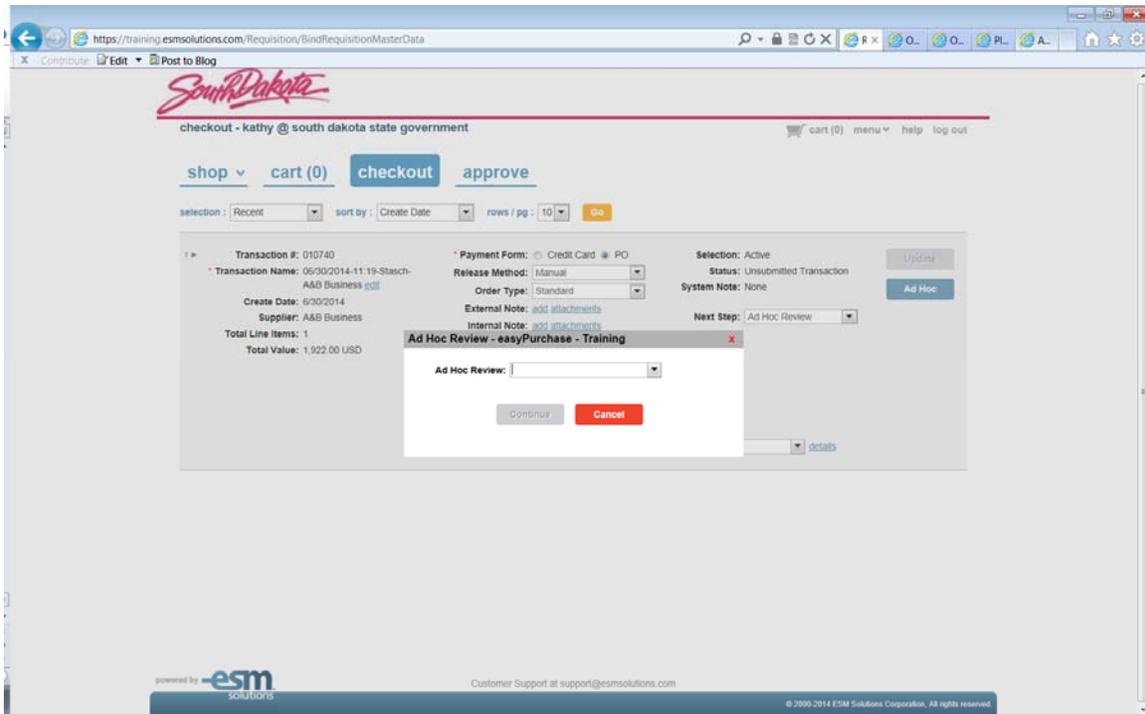
Do not add an OPM Buyer as an Ad Hoc. If you want an OPM Buyer to process this requisition you will need to select **Encumbrance To OPM** as the Approval Workflow.

This is assuming you have added items to your cart and are ready to checkout; for instructions on selecting and adding items to your cart see page 1. The instructions below are starting after you have entered all the information in **Checkout** and **Updated** the information.

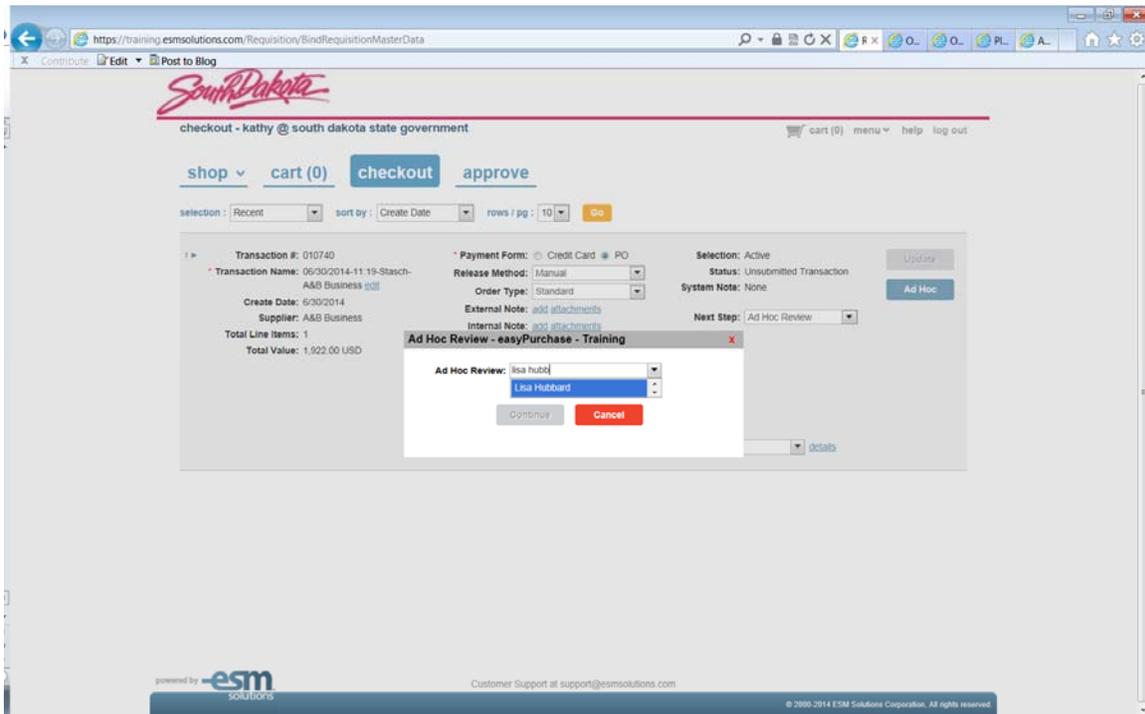


Select the drop down arrow in the **Next Step**: field

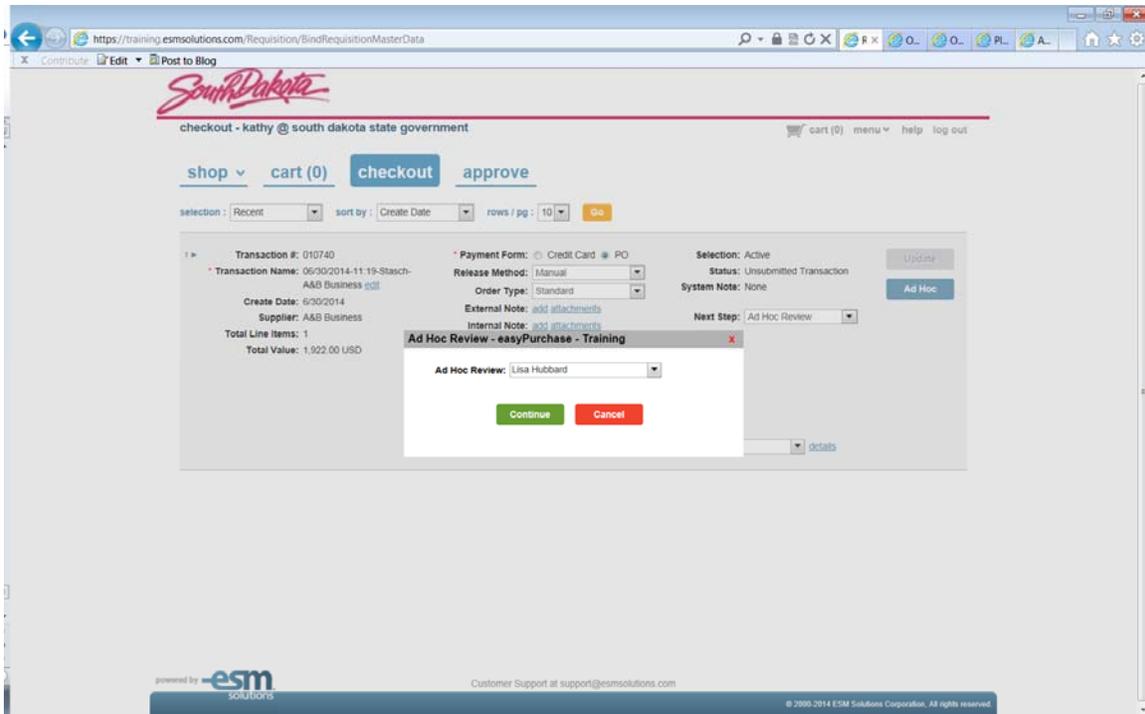
Select **Ad Hoc Review** and **Ad Hoc**



In the Ad Hoc Review: field **type the name of the individual** who is to review this requisition.



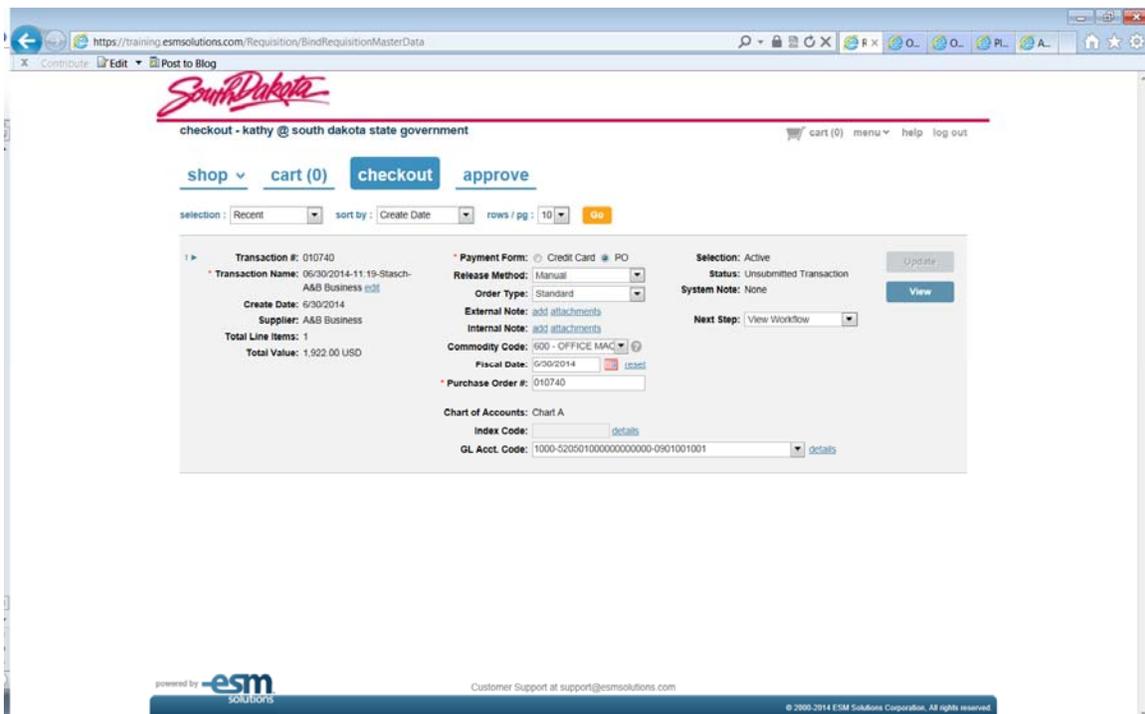
Select the individual's name



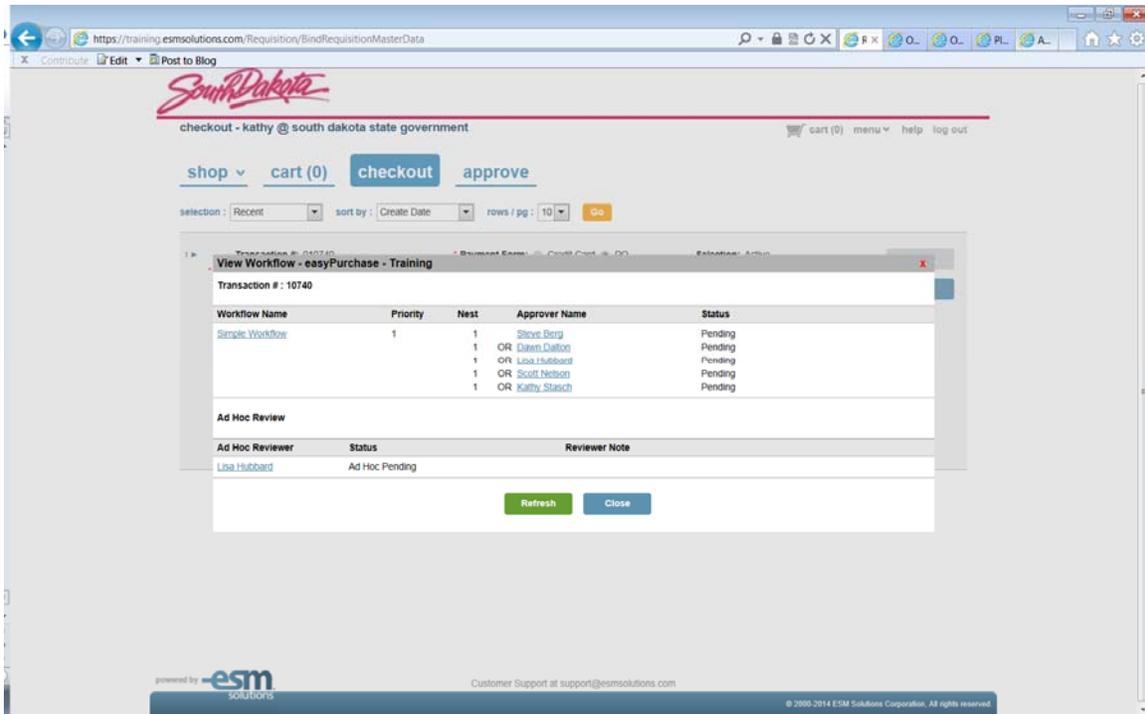
Select **Continue**

Select the drop down arrow in the **Next Step**: field

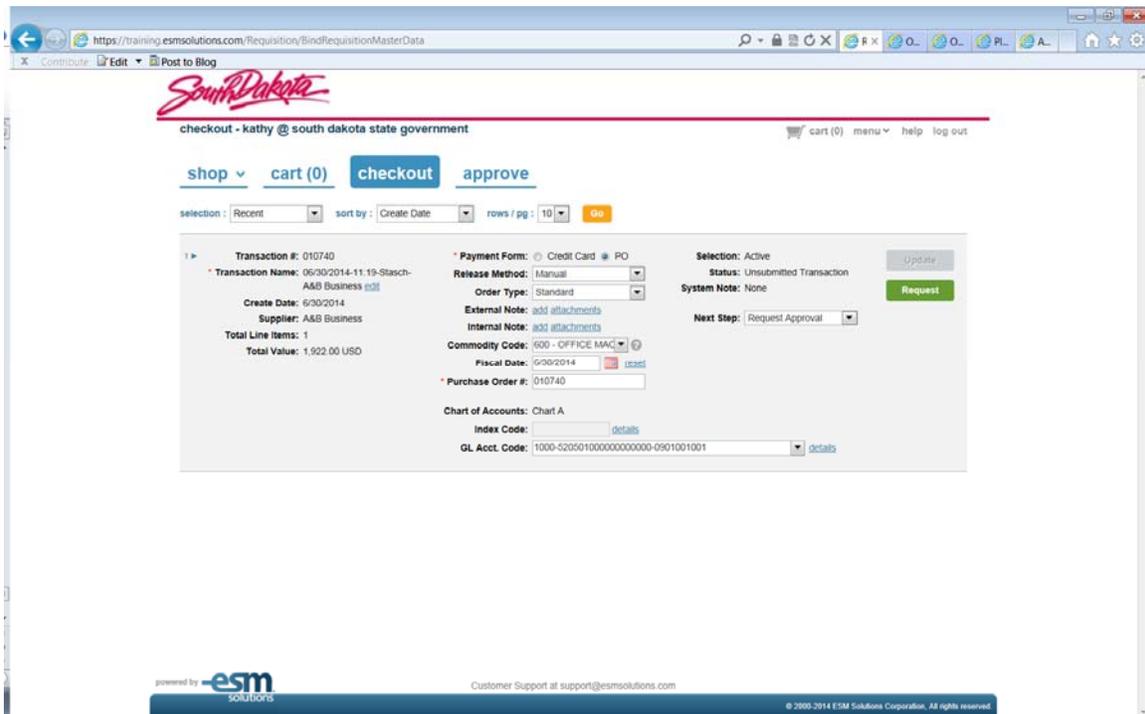
Select **View Workflow**



Select **View**



Note that Lisa Hubbard's name is now added to the workflow.



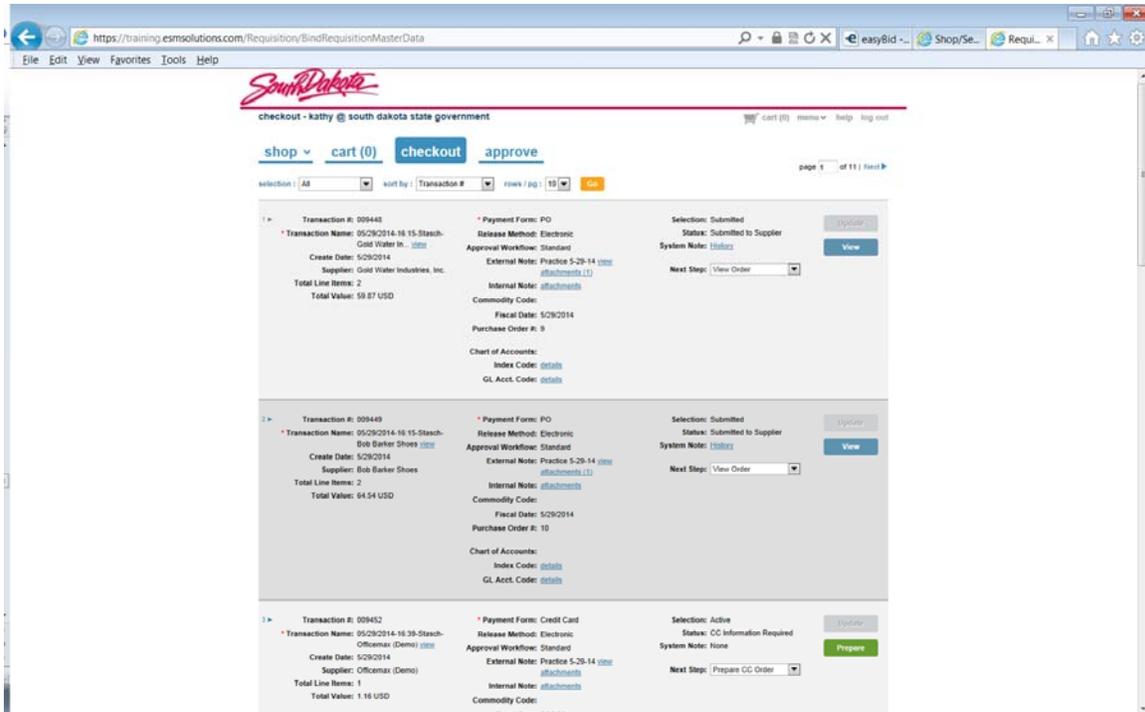
Select Request

Once you have selected Request the requisition will go through the proper workflow requests and be processed as you stated in the Checkout screen.

How to Print a Purchase Order for later use

If you want to print a purchase order for example after you receive an invoice you can do so at the Checkout screen.

Have your search criteria set as you wish in **Checkout**



In the Next Step: field Select **View Order** and **View**

View Purchase Order - easyPurchase - Training - Windows Internet Explorer provided by State of South Dakota
 https://training.esmsolutions.com/Order/GetViewOrderDetails?RequisitionId=9448

purchase order



Gold Water Industries, Inc.
 17221 S Western Ave
 Gardena, CA 90247
 United States
 Attn: Gold Water Industries, Inc.
 Phone: 123-456-7899

Date: 5/29/2014
 Purchase Order #: 9
 Transaction #: 009448
 Requested By: Kathy Stasch
 Requester Email: kathy.stasch@state.sd.us
 Authorized By: Kathy Stasch

[Print](#)
[Close](#)

Ship To
 South Dakota State Government
 Default Location
 Office of Procurement Management
 523 E. Capitol Avenue
 Pierre, SD 57501
 United States
 Attn: Kathy Stasch
 Phone: 605.773.5270

Bill To
 South Dakota State Government
 Default Location
 Office of Procurement Management
 523 E. Capitol Avenue
 Pierre, SD 57501
 United States
 Attn: Steven Berg
 Phone: 605.773.5270

Order Comments: Practice 5-29-14

Item #	Description	UCM	QTY	Unit Price	Line Total
M904	Low Top Canvas Shoe Contract ID: 16477	PR	1	4.35 USD	4.35 USD
M364K	Black Leather 6" Work Boot Contract ID: 16477	PR	4	13.80 USD	55.52 USD
Subtotal:					59.87 USD
Tax:					0.00 USD
S&H:					0.00 USD
Total:					59.87 USD

General Terms
 This PO number must appear on all packing slips, shipping containers, invoices, statements, and correspondence to insure prompt payment of all claims. This purchase order is subject to and incorporates standard purchasing terms and conditions of the South Dakota Bureau of Administration, Office of Procurement Management. The standard terms and conditions may include provisions regarding insurance, indemnity, liability, acceptance, billing, inspection, warranty, infringement of patents, trademarks or copyrights, use of information, supplier's information, licenses, South Dakota identification, compliance with federal, state and local laws, assignment, bankruptcy, tax, variation of quantity and personal liability. If this

[Print](#)
[Close](#)

Select Print

Cliff Notes

The notes below are a quick way of submitting information you must provide when creating requisitions in ESM without the print screens.

Punch-Out Catalog Orders – OfficeMax, Grainger & Fastenal

Direct Voucher – Purchases Under \$4000

The information provided is after you have shopped and added items to your cart.

Payment Form: **PO**

Release Method: **Electronic**

Purchase Order will automatically be released to the vendor. Select Electronic only for the Punch-Out Catalogs.

Approval Workflow: **Agency Workflow**

External Note: External Note is information or instructions to the vendor. This information will be printed on the purchase order. OfficeMax does not read External Notes so it is recommended that you do not provide any information in the External Notes if the order is going electronically to OfficeMax.

Internal Note: Internal Note is information that can be viewed only by the State Agency and Office of Procurement Management. Information you may want to provide is who the item is for or any other information you may find pertinent to the requisition.

NIGP Code Required: **615 Office Supplies**

Purchase Order #: 15PO + the last 6 digits of the Transaction # such as **15PO011274**

This is referred to as a Local Purchase Order which will not be encumbered through the State's accounting system.

GL Acct. Code: Can be left blanked since it is a Local Purchase order

Select **Update**

Select **Request**

Requisition is now waiting for the Agency approval. When requisition has been approved, the creator of the requisition will receive an email stating the requisition has been approved and they may now write the purchase order and release it.

Select **Checkout**

Select the proper requisition to be submitted. You may have more than one requisition that has been approved and needs to be submitted to the vendor.

Select **Release**

Select **Continue**

Select **Place Order**

You can then select System Note: **History**

This will allow you to see that your purchase order was successfully released to the supplier and you can also print a copy of the purchase order.

Purchasing Card - Purchases Under \$4000

The information provided is after you have shopped and added items to your cart.

Payment Form: **Credit Card**

Release Method: **Electronic**

Approval Workflow: **Agency Workflow**

External Note: External Note is information or instructions to the vendor. This information will be printed on the purchase order. OfficeMax does not read External Notes so it is recommended that you do not provide any information in the External Notes if the order is going electronically to OfficeMax.

Internal Note: Internal Note is information that can be viewed only by the State Agency and Office of Procurement Management. Information you may want to provide is who the item is for or any other information you may find pertinent to the requisition.

NIGP Code Required: **615 Office Supplies**

Purchase Order #: 15PO + the last 6 digits of the Transaction # such as **15PO011275**

This is referred to as a Local Purchase Order which will not be encumbered through the State's accounting system.

GL Acct. Code: Can be left blanked since it is a Purchase Card purchase

Select **Update**

Select **Request**

Requisition is now waiting for the Agency approval. When requisition has been approved, the creator of the requisition will receive an email stating the requisition has been approved and they may now write the purchase order and release it.

Select **Checkout**

Select the proper requisition to be submitted. You may have more than one requisition that has been approved and needs to be submitted to the vendor.

Select **Prepare**

Provide the information as described below. The first time you will enter your name, phone number, card type and expiration date; from this point on this information will be retained for future use. Your card # will not be retained. You will always have to enter your card # for each purchase due to federal rules and guidelines.

Name on Card:

Contact Phone Number:

Card Type: **MC**

Card #: Use 555555555554444 wen in the training site, otherwise, you will submit your actual credit card number in the live production site.

Expiration Date:

Select **Continue**

Select **Place Order**

You can then select System Note: **History**

This will allow you to see that your purchase order was successfully released to the supplier.

Non-Catalog Item Purchases Under \$4000

Non-Catalog Purchasing Card - Purchases Under \$4000

Select **Shop**; then **Non-Catalog Item**

Type in the Supplier Name and select **Go**

If vendor is not available, search to see if vendor is on the State's Accounting System. If the vendor is not on the State's Accounting System, you will need to get W9 from the vendor and have it added to the State's Accounting System; be sure to check the box to add it as a Purchasing Vendor. The vendor will be available in ESM two days later after it has been added to the State's Accounting System.

Select the Vendor with the proper address of where your order is to be received.

Select **New Item**

Item Service: Is the name of the product. Provide the name as you see on the vendor's quote. This information will print on the purchase order and will tell the vendor exactly what it is you are ordering.

UOM: Stands for Units of Measure. The default is "Each" but you may change the UOM as per stated on the quote.

Qty: Is the quantity you are purchasing per the UOM.

List Price: Is the price of the item

MFG/Provider: Is the Manufacturer of the product you are ordering

MFG/Provider Part #: Is the vendor's part number for the product you are ordering

Catalog Item #: Is not always provided on a quote and this isn't required if there is no catalog item available on the quote.

UPC: Stands for Universal Product Code; I don't think you will use this much but if a quote has it listed, then I would add it to the requisition, otherwise, you can leave it blank.

CAS Number: Stands for Chemical Registry Service. This is a unique numerical identifier assigned by Chemical Abstracts Service to every chemical substance. More than likely this will not apply and you can leave it blank.

Select **Add to Cart**

Select **New Item** If you have another item to add to the requisition; fill out the information just as described above.

Select **Cart** when you have added all of your items to purchase. Your cart quantity will vary with the number of items you are purchasing. When your cart reaches over 99 items, the cart will state 99+.

Select **Continue**

Payment Form: **Credit Card**

Release Method: **Manual** Only the Punch-Out Catalogs for now will be sent out as an electronic purchase order.

Approval Workflow: **Agency Workflow**

External Note: External Note is information or instructions to the vendor. This information will be printed on the purchase order.

Internal Note: Internal Note is information that can be viewed only by the State Agency and Office of Procurement Management. Information you may want to provide is who the item is for or any other information you may find pertinent to the requisition.

NIGP Code Required: Select a code that comes closes to what you are purchasing.

Purchase Order #: 15PO + the last 6 digits of the Transaction # such as **15PO011277**
This is referred to as a Local Purchase Order which will not be encumbered through the State's accounting system.

GL Acct. Code: Can be left blanked since it is a Purchase Card purchase

Select **Update**

Select **Request**

Requisition is now waiting for the Agency approval. When requisition has been approved, the creator of the requisition will receive an email stating the requisition has been approved and they may now write the purchase order and release it.

Select **Checkout**

Select the proper requisition to be submitted by reviewing the Transaction #, Transaction Name, Supplier and Total Value. You may have more than one requisition that has been approved and needs to be submitted to the vendor.

Select **Prepare**

Provide the information as described below. The first time you will enter your name, phone number, card type and expiration date; from this point on this information will be retained for future use. Your card # will not be retained. You will always have to enter your card # for each purchase due to federal rules and guidelines.

Name on Card:

Contact Phone Number:

Card Type: **MC**

Card #: Use 5555555555554444 when in the training site, otherwise, you will submit your actual credit card number in the live production site.

Expiration Date:

Select **Print**

Select **Adobe PDF, Print and Save** in the file location you created for Purchase Orders. Name the file with the Local Purchase Number such as **15PO011275**.

After saving the file close the Adobe purchase order and print screen.

Select **Continue**

Select **Place Order** The order will not go to the vendor because you selected Manual and not Electronic; you will have to do this final step to complete the order.

Send a copy of the purchase order as an attachment, in an email, to the vendor, and request a confirmation from the vendor that they received the purchase order.

Non-Catalog Direct Voucher - Purchases Under \$4000

Select **Shop**; then **Non-Catalog Item**

Type in the Supplier Name and select **Go**

If vendor is not available, search to see if vendor is on the State's Accounting System. If the vendor is not on the State's Accounting System, you will need to get W9 from the vendor and have it added to the State's Accounting System; be sure to check the box to add it as a Purchasing Vendor. The vendor will be available in ESM two days later after it has been added to the State's Accounting System.

Select the Vendor with the proper address of where your order is to be received.

Select **New Item**

Item Service: Is the name of the product. Provide the name as you see on the vendor's quote. This information will print on the purchase order and will tell the vendor exactly what it is you are ordering.

UOM: Stands for Units of Measure. The default is "Each" but you may change the UOM as per stated on the quote.

Qty: Is the quantity you are purchasing per the UOM.

List Price: Is the price of the item

MFG/Provider: Is the Manufacturer of the product you are ordering

MFG/Provider Part #: Is the vendor's part number for the product you are ordering

Catalog Item #: Is not always provided on a quote and this isn't required if there is no catalog item available on the quote.

UPC: Stands for Universal Product Code; I don't think you will use this much but if a quote has it listed, then I would add it to the requisition, otherwise, you can leave it blank.

CAS Number: Stands for Chemical Registry Service. This is a unique numerical identifier assigned by Chemical Abstracts Service to every chemical substance. More than likely this will not apply and you can leave it blank.

Select **Add to Cart**

Select **New Item** If you have another item to add to the requisition; fill out the information just as described above.

Select **Cart** when you have added all of your items to purchase. Your cart quantity will vary with the number of items you are purchasing. When your cart reaches over 99 items, the cart will state 99+.

Select **Continue**

Payment Form: **PO**

Release Method: **Manual** Only the Punch-Out Catalogs for now will be sent out as an electronic purchase order.

Approval Workflow: **Agency Workflow**

External Note: External Note is information or instructions to the vendor. This information will be printed on the purchase order.

Internal Note: Internal Note is information that can be viewed only by the State Agency and Office of Procurement Management. Information you may want to provide is who the item is for or any other information you may find pertinent to the requisition.

NIGP Code Required: Select a code that comes closes to what you are purchasing.

Purchase Order #: 15PO + the last 6 digits of the Transaction # such as **15PO011275**
This is referred to as a Local Purchase Order which will not be encumbered through the State's accounting system.

GL Acct. Code: Can be left blanked since it is a Local Purchase order

Select **Update**

Select **Request**

Requisition is now waiting for the Agency approval. When requisition has been approved, the creator of the requisition will receive an email stating the requisition has been approved and they may now write the purchase order and release it.

Select **Checkout**

Select the proper requisition to be submitted by reviewing the Transaction #, Transaction Name, Supplier and Total Value. You may have more than one requisition that has been approved and needs to be submitted to the vendor.

Select **Release**

Select **Print**

Select **Adobe PDF, Print and Save** in the file location you created for Purchase Orders. Name the file with the Local Purchase Number such as **15PO010725**.

After saving the file close the Adobe purchase order and print screen.

Select **Continue**

Select **Place Order** The order will not go to the vendor because you selected Manual and not Electronic; you will have to do this final step to complete the order.

Send a copy of the purchase order as an attachment, in an email, to the vendor, and request a confirmation from the vendor that they received the purchase order.

Contract Catalog Item Purchases Under \$4000

Contract Catalog Purchasing Card - Purchases Under \$4000

Select the Contract Catalog from the list of catalogs listed under the Sourcing Contract of the product you wish to purchase.

Find the item(s) you wish to purchase; enter the quantity and Select **Add to Cart** and **Cart**

Review your cart; make any changes you need and Select **Continue**

Payment Form: **Credit Card**

Release Method: **Manual**

Only the Punch-Out Catalogs for now will be sent out as an electronic purchase order.

Approval Route: **Agency Workflow**

External Note: External Note is information or instructions to the vendor. This information will be printed on the purchase order.

Internal Note: Internal Note is information that can be viewed only by the State Agency and Office of Procurement Management. Information you may want to provide is who the item is for or any other information you may find pertinent to the requisition.

NIGP Code Required: Select a code that comes closes to what you are purchasing.

Purchase Order #: 15PO + the last 6 digits of the Transaction # such as **15PO011182**

This is referred to as a Local Purchase Order which will not be encumbered through the State's accounting system.

GL Acct. Code: Can be left blanked since it is a Purchase Card purchase

Select **Update**

Select **Request**

Requisition is now waiting for the Agency approval. When requisition has been approved, the creator of the requisition will receive an email stating the requisition has been approved and they may now write the purchase order and release it.

Select **Checkout**

Select the proper requisition to be submitted by reviewing the Transaction #, Transaction Name, Supplier and Total Value. You may have more than one requisition that has been approved and needs to be submitted to the vendor.

Select **Prepare**

Provide the information as described below. The first time you will enter your name, phone number, card type and expiration date; from this point on this information will be retained for future use. Your card # will not be retained. You will always have to enter your card # for each purchase due to federal rules and guidelines.

Name on Card:

Contact Phone Number:

Card Type: **MC**

Card #: Use 5555555555554444 when in the training site, otherwise you will submit your actual credit card number in the live production site.

Expiration Date:

Select **Print**

Select **Adobe PDF, Print and Save** in the file location you created for Purchase Orders. Name the file with the Local Purchase Number such as **15PO011182**.

After saving the file close the Adobe purchase order and print screen.

Select **Continue**

Select **Place Order** The order will not go to the vendor because you selected Manual and not Electronic; you will have to do this final step to complete the order.

Send a copy of the purchase order as an attachment, in an email, to the vendor, and request a confirmation from the vendor that they received the purchase order.

Encumbrances of Non Contract and Contract Item Purchases Under \$4000

Encumbered Purchases - Purchases Under \$4000

This is assuming you have added items to your cart and are ready to checkout; for instructions on selecting and adding items to your cart see page 1. The instructions below are starting from **Checkout** after you have added items to your cart.

Payment Form: **PO**

Release Method: **Manual**

Only the Punch-Out Catalogs for now will be sent out as an electronic purchase order.

Approval Workflow: **Encumbrance To OPM**

Your agency approvers will still receive the requisition to be approved. When the agency has finished the approval stage the requisition will then be routed to OPM for approval and for a purchase order to be written through the State's Accounting System.

External Note: External Note is information or instructions to the vendor. This information will be printed on the purchase order.

Internal Note: Add quote(s) within the Attachment Internal Note is information that can be viewed only by the State Agency and Office of Procurement Management. Information you may want to provide is who the item is for or any other information you may find pertinent to the requisition.

NIGP Code Required: Select a code that comes closest to what you are purchasing.

Purchase Order #: Enter the Transaction # **011280**

GL Acct. Code: You will need to select the proper account code since this will be encumbered through the State's Accounting System

Select **Update**

Select **Request**

The requisition will be approved by the agency workflow and the OPM Encumbrance Workflow.

OPM will then process the requisition into a purchase order and the ordering process has been completed.

You will receive an email message from ESM Solutions stating the Transaction is complete and that you must now share a copy of the purchase order to the Supplier/Vendor. **DO NOT** send a copy of this purchase order to the Supplier/Vendor. OPM will send a copy to the Supplier/Vendor and to the Agency Contact Person.

Example of Email from ESM Solutions:

From: noreply@esmsolutions.com [mailto:noreply@esmsolutions.com]
Sent: Wednesday, July 09, 2014 9:42 AM
To: Steven, Berg
Subject: SYSTEM MESSAGE - Transaction 067805 - 07/08/2014-11:01-Berg-Hewlett-Packard Company

Dear Steven,

The following transaction is complete. Since this is a manual order, you may need to share a copy of the included order with the supplier. Otherwise, no additional action is required.

Transaction #: 067805
Transaction Name: 07/08/2014-11:01-Berg-Hewlett-Packard Company
Release Method: Manual
Order Type: Standard

If you have any questions, please contact your system administrator for assistance.

Thank you,
ESM Solutions Customer Support Server

NOTE: This is a system generated email. Please do not reply to this email.

purchase order



Encumbrances of Non Contract and Contract Item Purchases \geq \$4000

Non Catalog and Contract Purchases \geq \$4000 - Office of Procurement Management Purchase Order

This is assuming you have added items to your cart and are ready to checkout; for instructions on selecting and adding items to your cart see page 1. The instructions below are starting from **Checkout** after you have added items to your cart.

Payment Form: **PO**

Release Method: **Manual**

Only the Punch-Out Catalogs for now will be sent out as an electronic purchase order.

Approval Workflow: **Agency Workflow**

Select Agency Workflow when the dollar amount is **equal to or greater than** \$4000. The requisition will automatically be routed to OPM for approval and for a purchase order to be written through the State's Accounting System.

Use Encumbered to OPM only when the dollar amount is **less than** \$4000 and you want it written through the State's Accounting System.

External Note: External Note is information or instructions to the vendor. This information will be printed on the purchase order.

Internal Note: Add quote(s) within the Attachment Internal Note is information that can be viewed only by the State Agency and Office of Procurement Management. Information you may want to provide is who the item is for or any other information you may find pertinent to the requisition.

NIGP Code Required: Select a code that comes closes to what you are purchasing.

Purchase Order #: Enter the Transaction # **011280**.

GL Acct. Code: You will need to select the proper account code since this will be encumbered through the State's Accounting System

Select **Update**

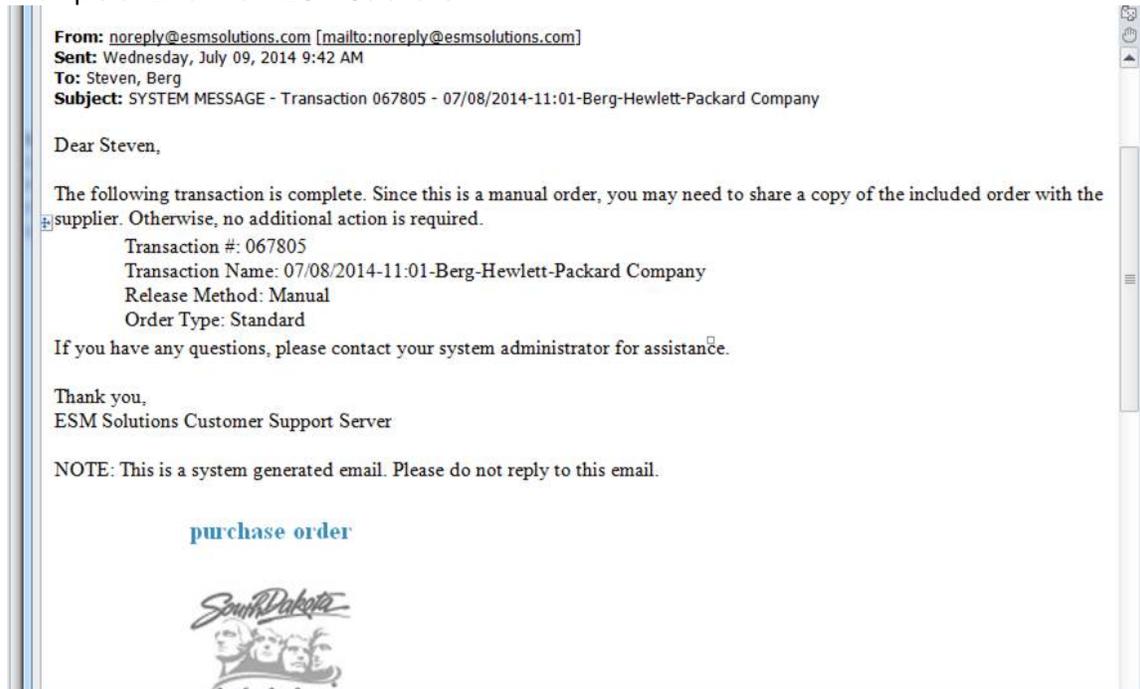
Select **Request**

The requisition will be approved by the agency workflow and the OPM Encumbrance Workflow.

OPM will then process the requisition into a purchase order and the ordering process has been completed.

You will receive an email message from ESM Solutions stating the Transaction is complete and that you must now share a copy of the purchase order to the Supplier/Vendor. **DO NOT** send a copy of this purchase order to the Supplier/Vendor. OPM will send a copy to the Supplier/Vendor and to the Agency Contact Person.

Example of Email from ESM Solutions:



How to add an individual to a requisition for review – Ad Hoc

An individual can be added to a requisition for reviewing purposes only such as a Manager. The added individual will not be able to make any changes to the requisition; they can only view the requisition. The added individual will see the requisition before the purchase order has been written.

Do not add an OPM Buyer as an Ad Hoc. If you want an OPM Buyer to process this requisition you will need to select **Encumbrance To OPM** as the Approval Workflow.

This is assuming you have added items to your cart and are ready to checkout; for instructions on selecting and adding items to your cart see page 1. The instructions below are starting after you have entered all the information in **Checkout** and **Updated** the information.

Select the drop down arrow in the **Next Step:** field

Select **Ad Hoc Review** and **Ad Hoc**

In the Ad Hoc Review: field **type the name of the individual** who is to review this requisition.

Select the individual's name

Select **Continue**

Select the drop down arrow in the **Next Step:** field

Select **View Workflow**

Select **View**

Note that the person you selected is now added to your workflow.

Select **Request**

Once you have selected Request the requisition will go through the proper workflow requests and be processed as you stated in the Checkout screen.

How to Print a Purchase Order for later use

If you want to print a purchase order for example after you receive an invoice you can do so at the Checkout screen.

Have your search criteria set as you wish in **Checkout**

In the Next Step: field Select **View Order** and **View**

Select **Print**