

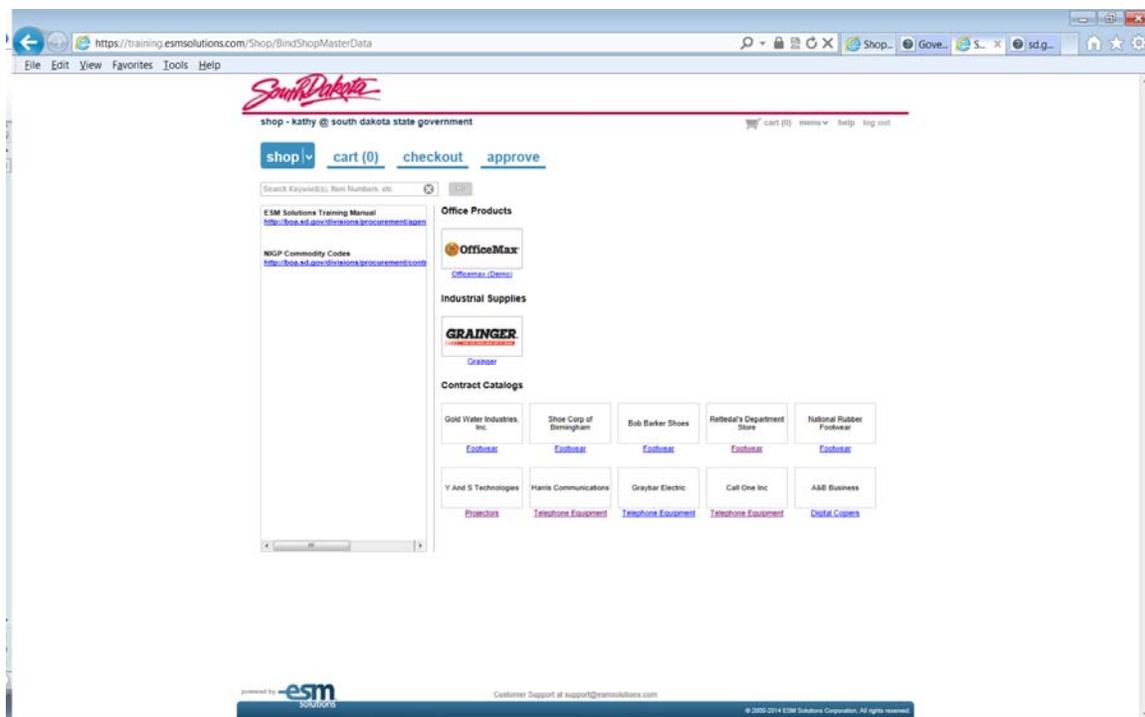
# ESM Training Manual

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## Punch-Out Catalog Orders – OfficeMax, Grainger & Fastenal

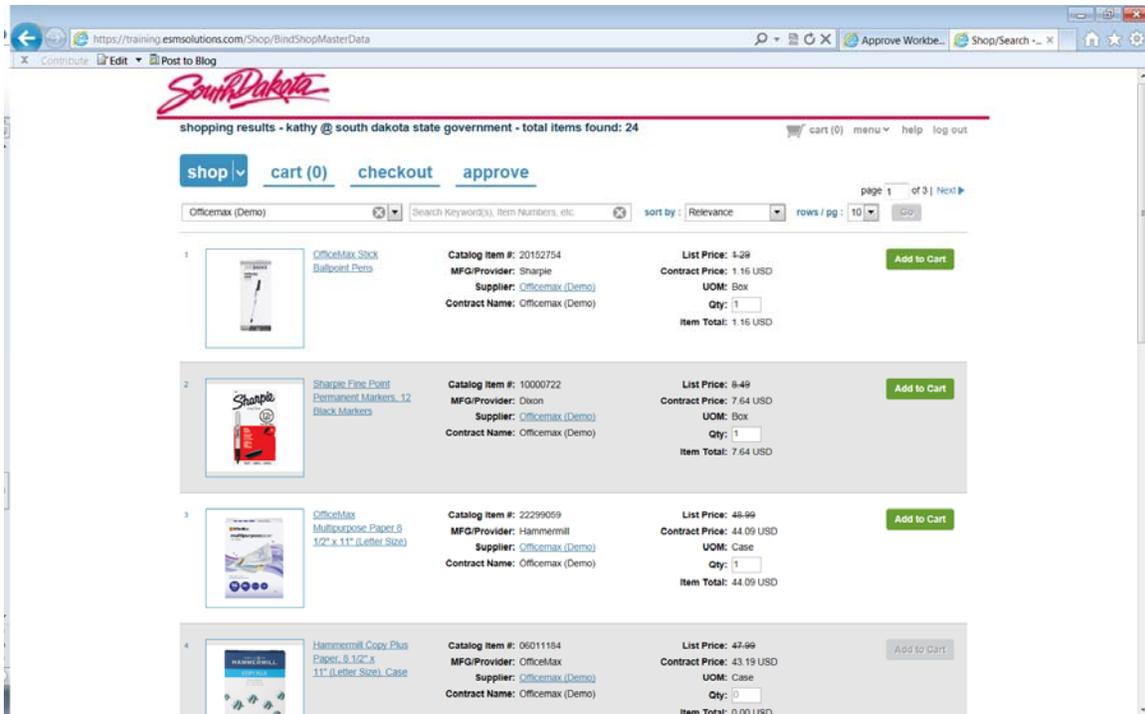
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*Direct Voucher – Purchases Under \$4000*

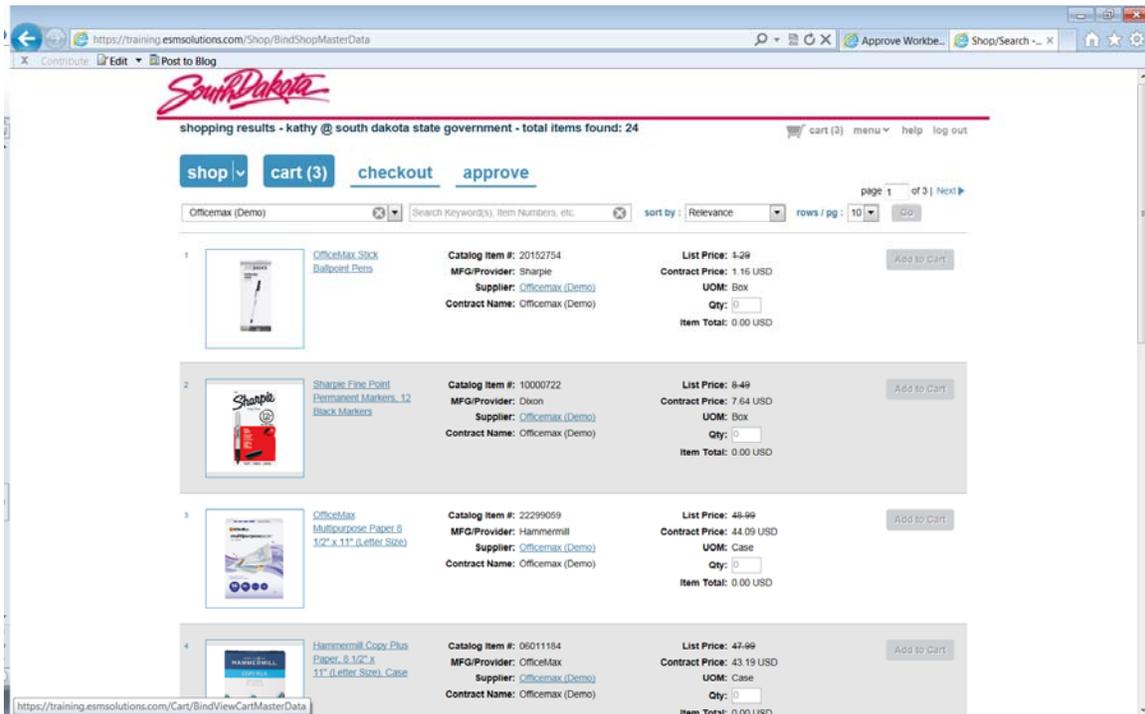


### Select **OfficeMax**

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>	<input type="button" value="Update"/> <input type="button" value="Delete"/>
 <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>	<input type="button" value="Update"/> <input type="button" value="Delete"/>
 <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>	<input type="button" value="Update"/> <input type="button" value="Delete"/>

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

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

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

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 Customer Support at support@esmsolutions.com  
 © 2005-2014 ESM Solutions Corporation. All rights reserved.

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.

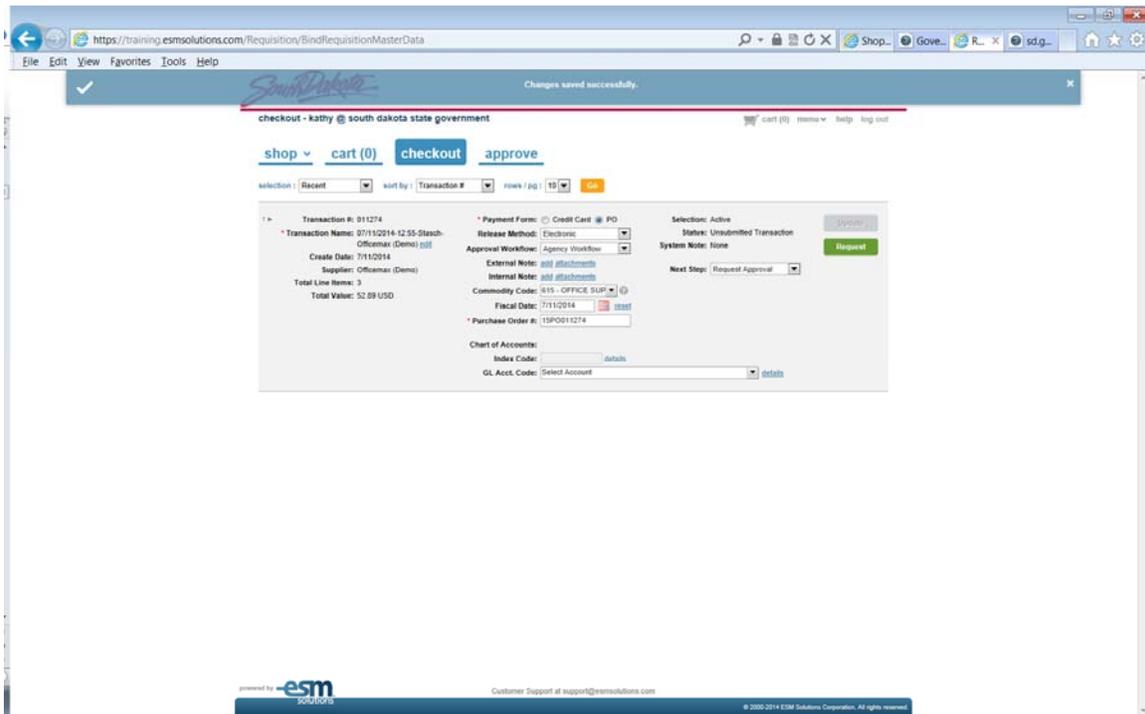
**Internal Note:** Internal Note is information that can be viewed only by the State Agency and Office of Procurement Management. Information you may want to provide is who the item is for or any other information you may find pertinent to the requisition.

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.

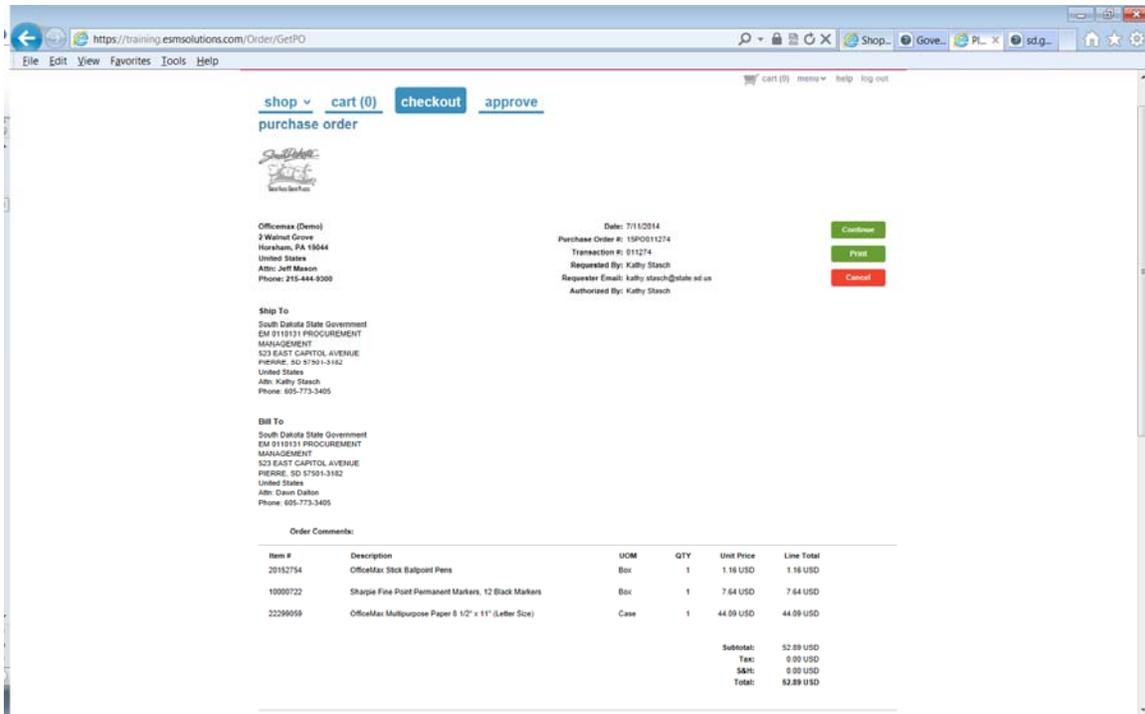
## Select Checkout

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.

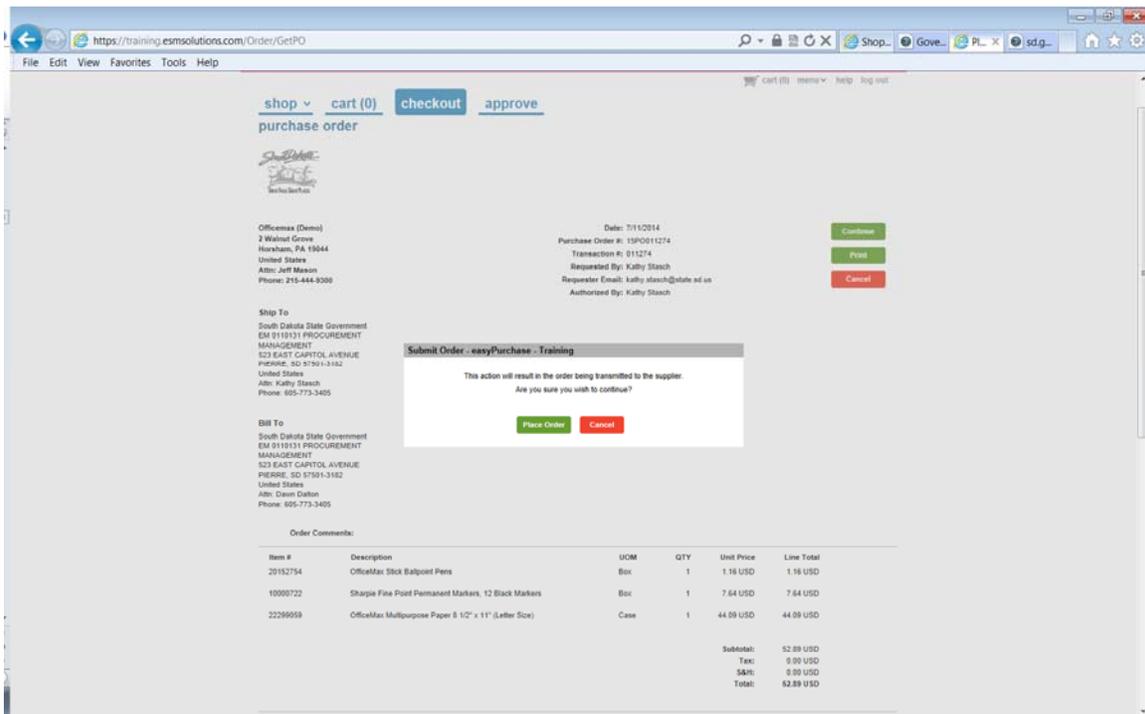
The screenshot shows a web browser window displaying the ESM Solutions application. The URL is <https://training.esmsolutions.com/Requisition/BindRequisitionMasterData>. The page header includes the South Dakota logo and the user 'checkout - kathy @ south dakota state government'. Navigation tabs for 'shop', 'cart (0)', 'checkout', and 'approve' are visible. Below the navigation, there are filters for 'selection' (Recent) and 'sort by' (Transaction #). The main content area displays details for Transaction # 011274, including Transaction Name, Create Date, Supplier, Total Line Items, Total Value, Payment Form, Release Method, Approval Workflow, External Note, Internal Note, Commodity Code, Fiscal Date, Purchase Order #, and Chart of Accounts. A 'Release' button is present in the top right of the details panel.

Transaction #	011274	Payment Form:	PO	Selection:	Active
Transaction Name:	07/15/2014 12:55:55-Stack-Officemas (Demo) <a href="#">View</a>	Release Method:	Electronic	Status:	Pending Release
Create Date:	7/15/2014	Approval Workflow:	Agency Workflow	System Note:	None
Supplier:	Officemas (Demo)	External Note:	<a href="#">Attachments</a>	Next Step:	Release PO
Total Line Items:	3	Internal Note:	<a href="#">Attachments</a>		
Total Value:	52.89 USD	Commodity Code:	815 - OFFICE SUPPLIES, GENERAL		
		Fiscal Date:	7/15/2014		
		Purchase Order #:	1SP011274		
		Chart of Accounts:			
		Index Code:	<a href="#">Details</a>		
		GL Acct. Code:	<a href="#">Details</a>		

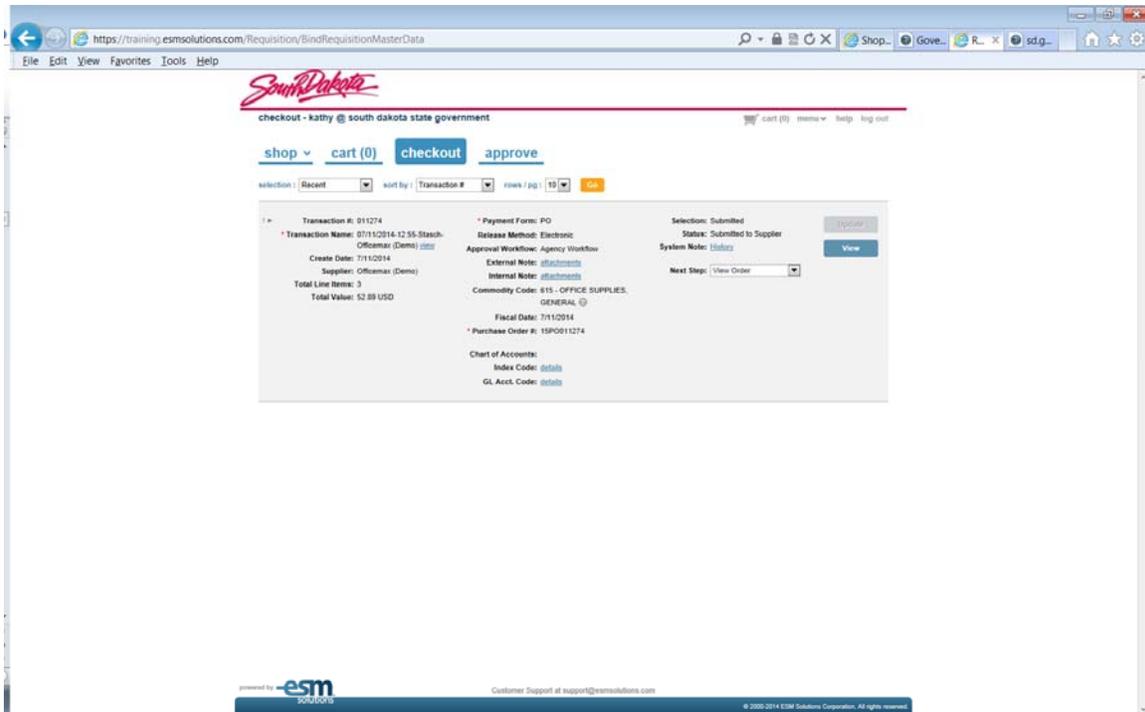
## Select Release



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.

## 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 'checkout - kathy @ south dakota state government'. Navigation tabs include 'shop', 'cart (0)', 'checkout', and 'approve'. Below the navigation, there are filters for 'selection' (Recent) and 'sort by' (Transaction #). The main content area displays transaction details for Transaction # 011275, including Release Method (Electronic), Approval Workflow (Agency Workflow), External Note, Internal Note, Commodity Code (615 - OFFICE SUP), Fiscal Date (7/11/2014), and Purchase Order # (15PO011275). The total value is \$1.10 USD. The page footer includes the ESM Solutions logo and copyright information.

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 shows 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". Below the header, there are navigation tabs: "shop", "cart (0)", "checkout", and "approve". A dropdown menu is set to "Recent" and a "Go" button is visible. The main content area displays a requisition form for Transaction # 011275. The form includes the following fields and values:

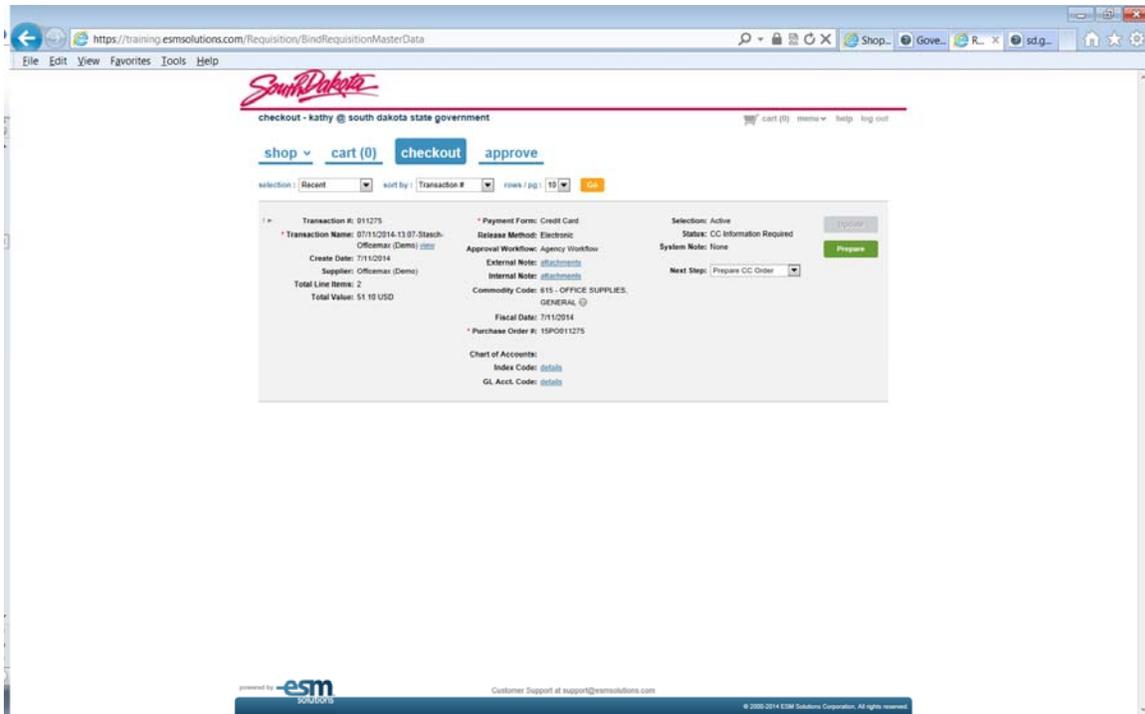
- Transaction Name: 07/15/2014-13-07-Stack-Officer (Demo) [edit](#)
- Create Date: 7/15/2014
- Supplier: Officer (Demo)
- Total Line Items: 2
- Total Value: 51.10 USD
- Payment Form:  Credit Card  PO
- Release Method: Electronic
- Approval Workflow: Agency Workflow
- External Note: [add attachments](#)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

On the right side of the form, there are buttons for "Update", "Request", and "Request Approval". The status is "Unsubmitted Transaction" and the next step is "Request Approval".

## Select Request

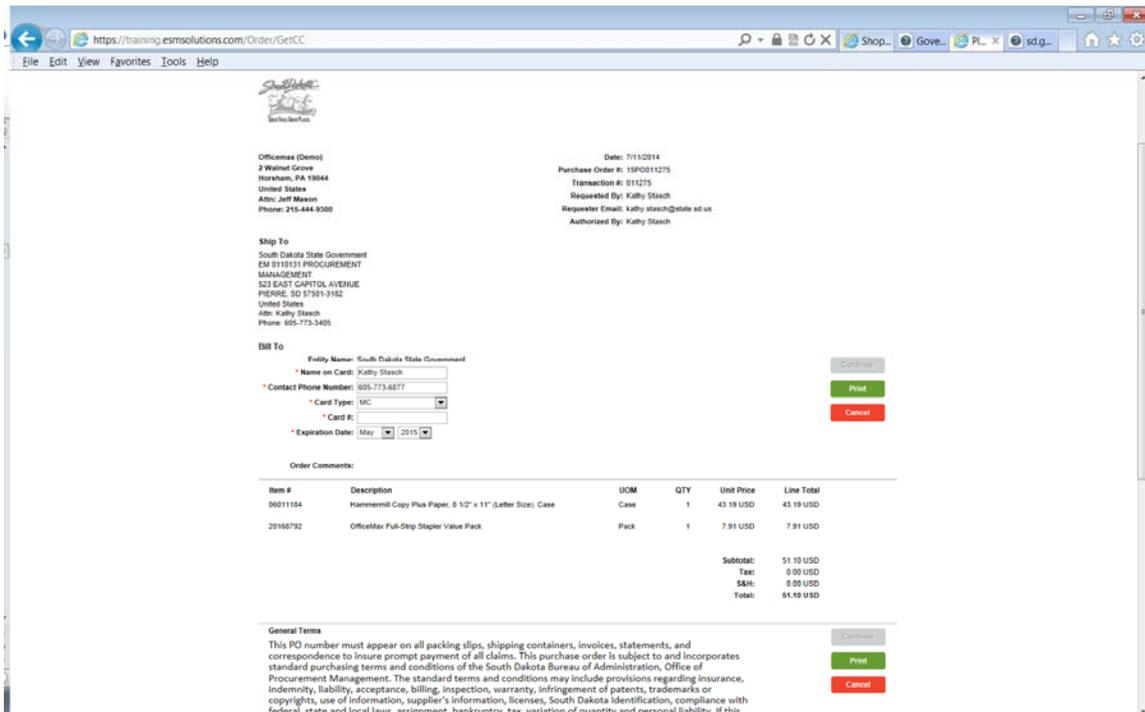
Requisition is now waiting for the Agency approval. When requisition has been approved, the creator of the requisition will receive an email stating the requisition has been approved and they may now write the purchase order and release it.

## 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**

Item #	Description	UCM	QTY	Unit Price	Line Total
0601104	Hammermill 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

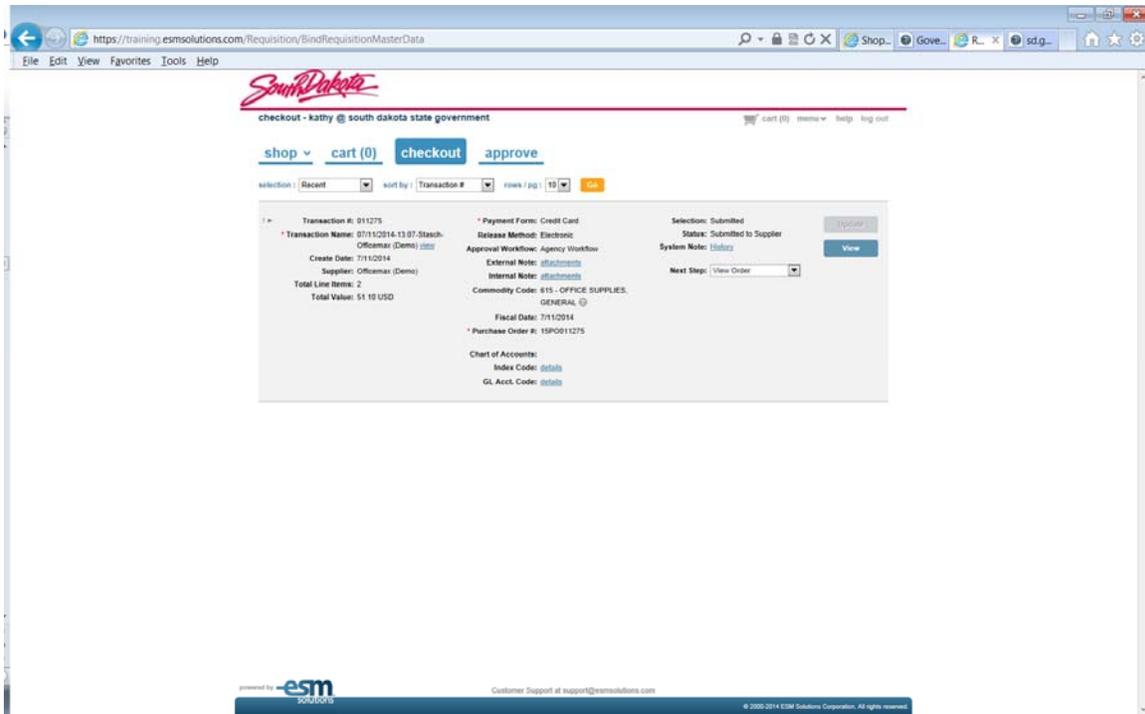
**General Terms**  
This PO number must appear on all packing slips, shipping containers, invoices, statements, and correspondence to insure prompt payment of all claims. This purchase order is subject to and incorporates standard purchasing terms and conditions of the South Dakota Bureau of Administration, 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

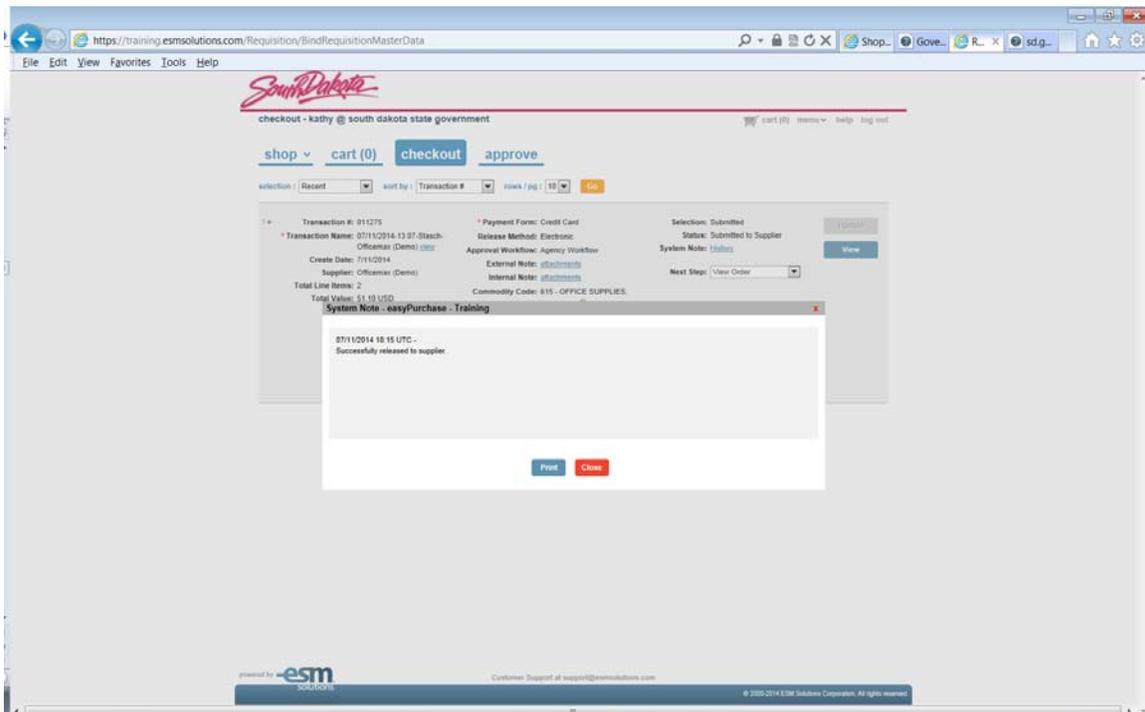
**\*\*For State Use Only\*\***

Agency Contact:  
Name: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Email: \_\_\_\_\_  
Invoice# \_\_\_\_\_ Final\_Partial \_\_\_\_\_  
Date Rec \_\_\_\_\_ By \_\_\_\_\_  
Coding \_\_\_\_\_

Select **Place Order**

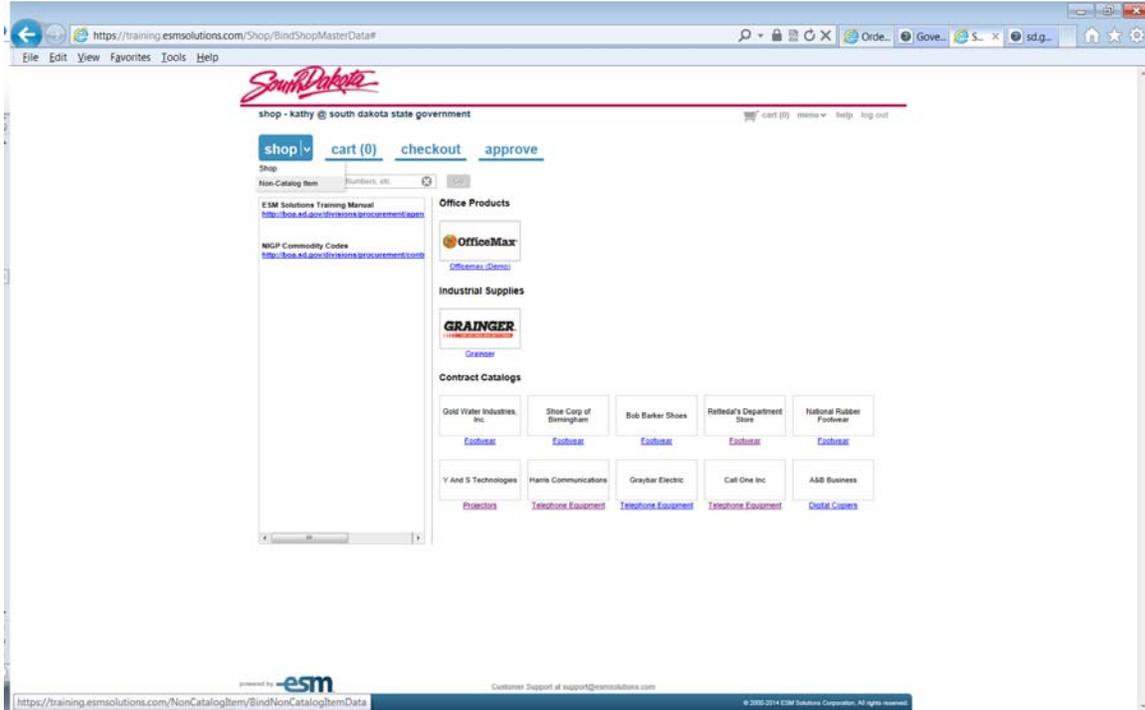


You can then select System Note: **History**  
This will allow you to see that your purchase order was successfully released to the supplier.

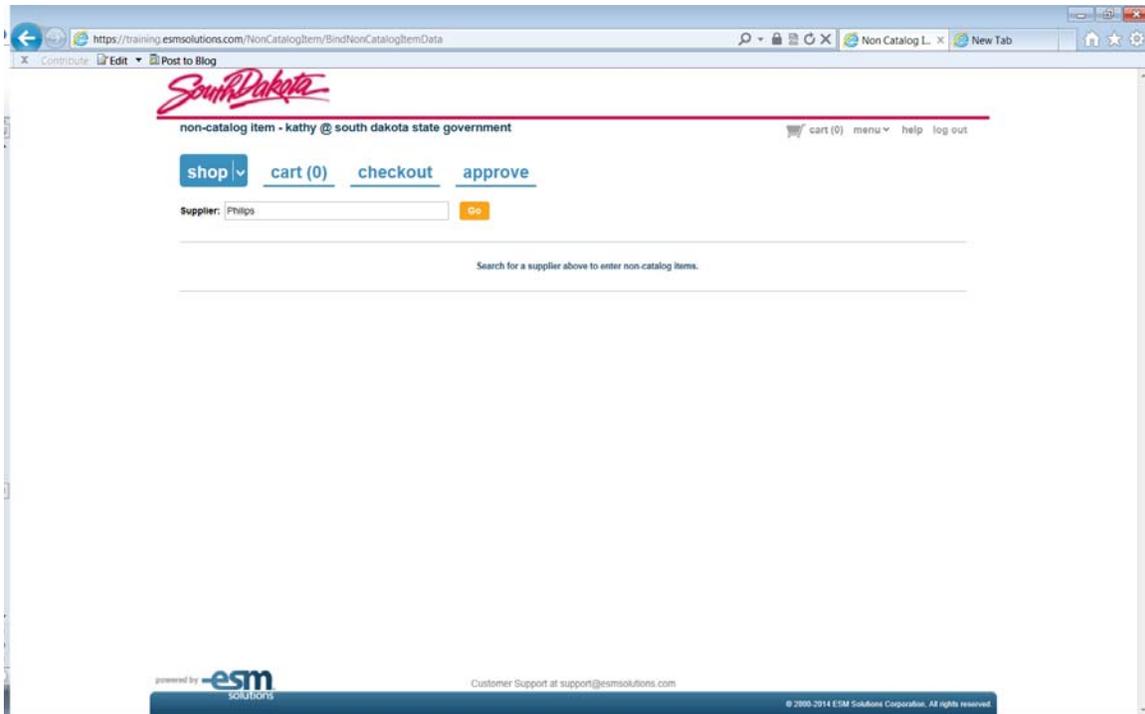


# Non-Catalog Item Purchases Under \$4000

## Non-Catalog Purchasing Card - Purchases Under \$4000

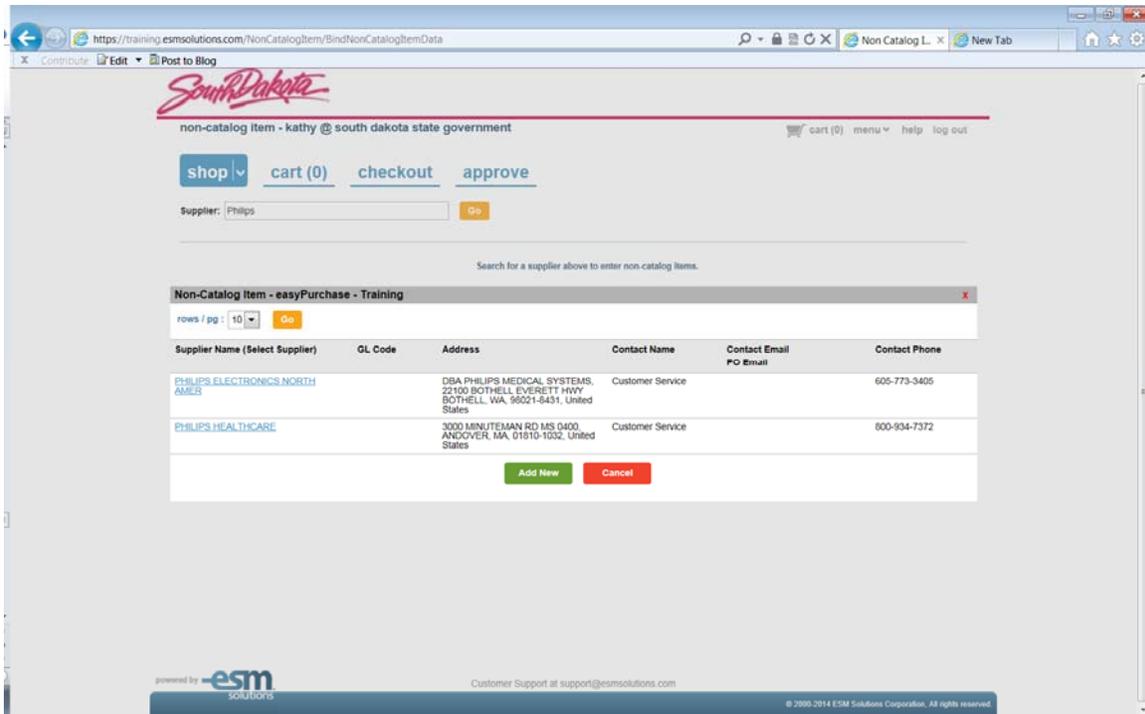


Select **Shop**; then **Non-Catalog Item**

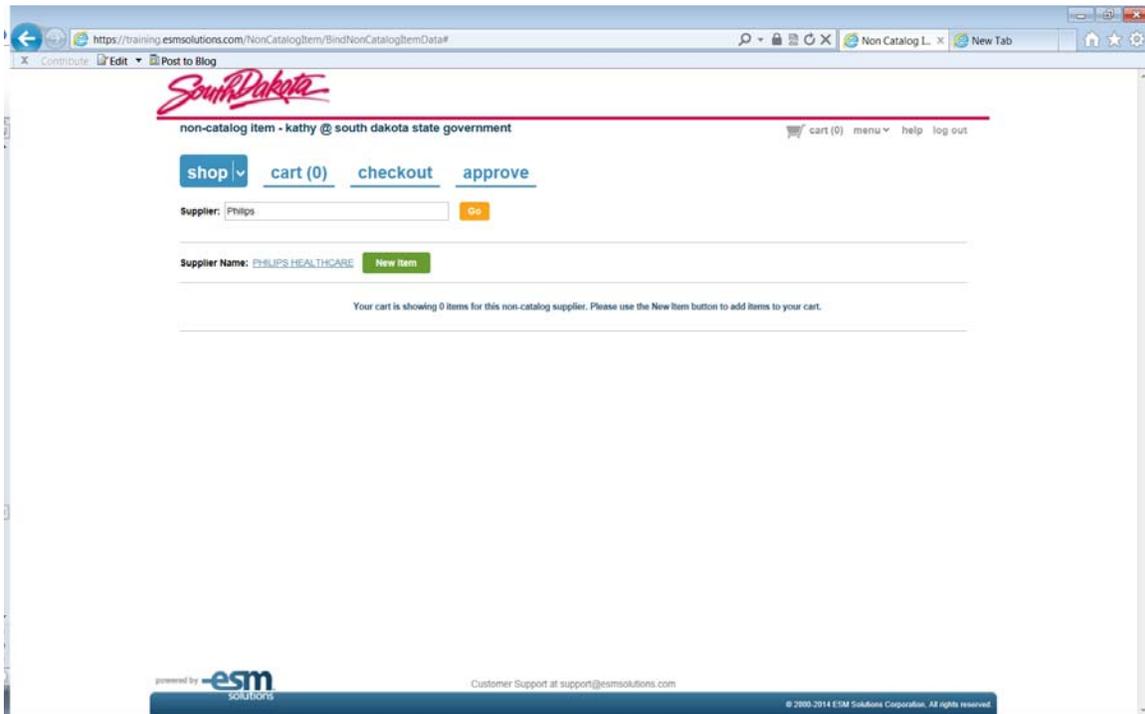


Type in the Supplier Name and select **Go**

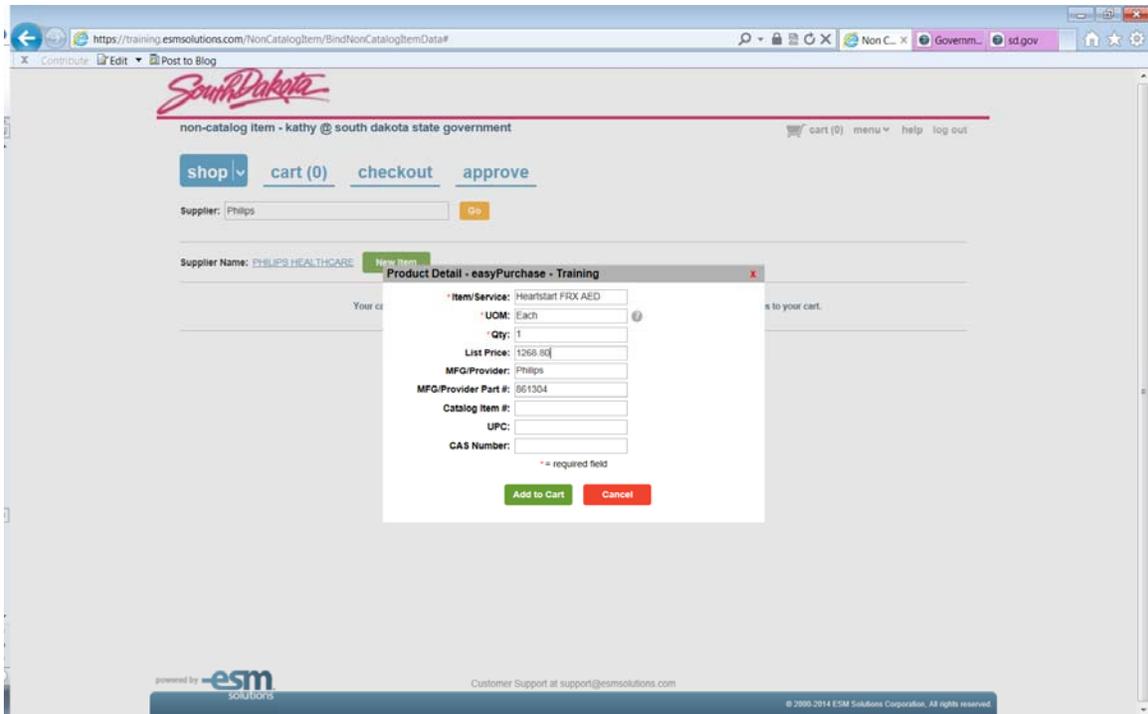
If vendor is not available, search to see if vendor is on the State's Accounting System. If the vendor is not on the State's Accounting System, you will need to get W9 from the vendor and have it added to the State's Accounting System; be sure to check the box to add it as a Purchasing Vendor. The vendor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

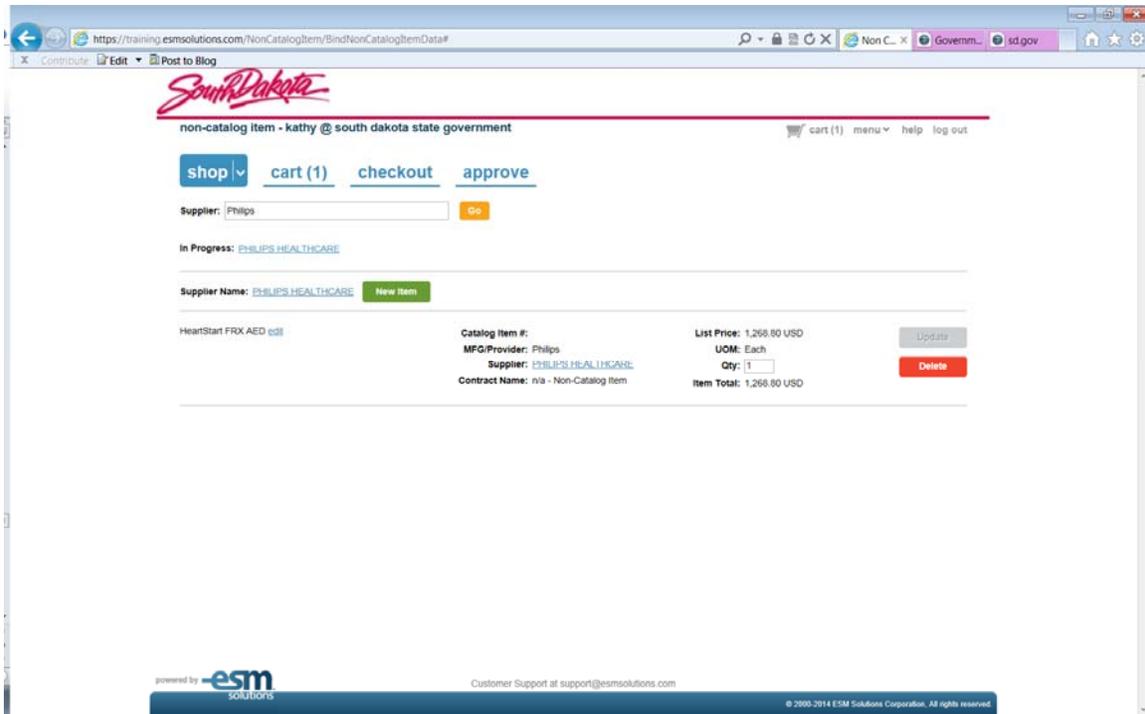
**MFG/Provider Part #:** Is the vendor's part number for the product you are ordering

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

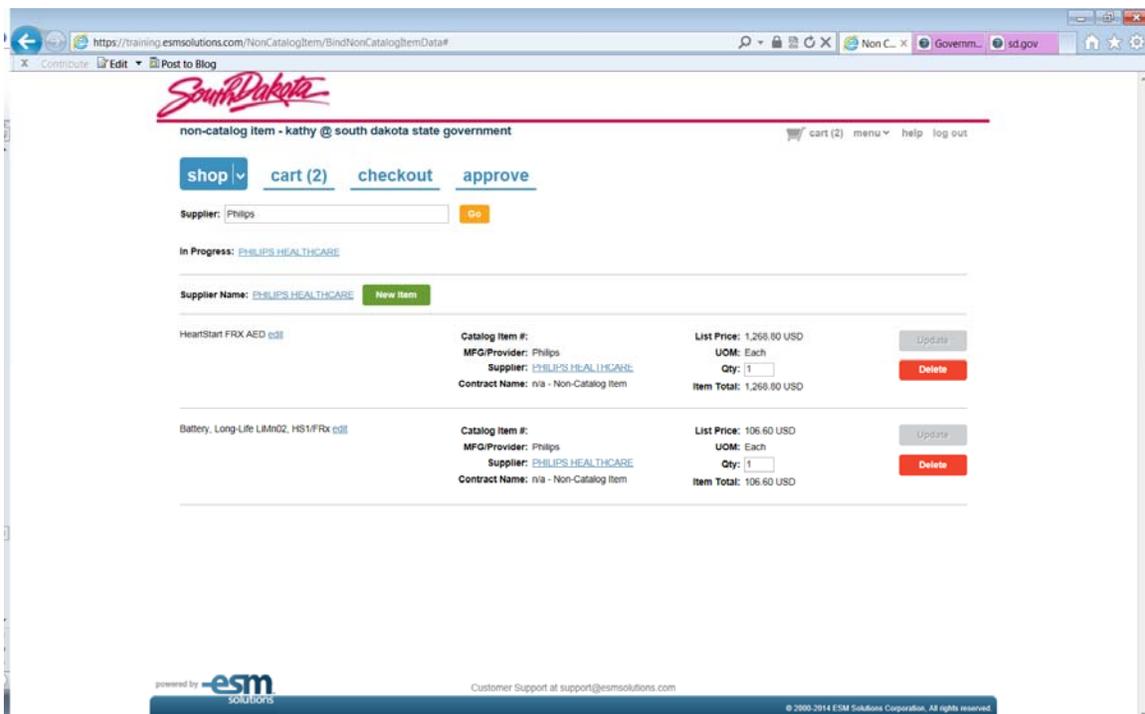
**UPC:** Stands for Universal Product Code; I don't think you will use this much but if a quote has it listed, then I would add it to the requisition, otherwise, you can leave it blank.

**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+.

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

South Dakota  
cart - kathy @ south dakota state government

shop cart (2) checkout approve

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

Convert Cart to 1 transaction(s): [Continue](#)

1		<a href="#">Battery_LongLife</a> <a href="#">LIM02_HS1ERX</a>	Catalog Item #: MFG/Provider: Philips Supplier: <a href="#">PHILIPS HEALTHCARE</a> Contract Name: n/a	List Price: 105.60 USD UOM: Each Qty: 1 Item Total: 105.60 USD	<a href="#">Update</a> <a href="#">Delete</a>
2		<a href="#">HeartStart_FRX_AED</a>	Catalog Item #: MFG/Provider: Philips Supplier: <a href="#">PHILIPS HEALTHCARE</a> Contract Name: n/a	List Price: 1,268.80 USD UOM: Each Qty: 1 Item Total: 1,268.80 USD	<a href="#">Update</a> <a href="#">Delete</a>

Total Item(s) in Cart: 2  
Number of Suppliers: 1  
Cart Subtotal: 1,375.40 USD  
Tax: 0.00 USD  
Cart Total: 1,375.40 USD

Convert Cart to 1 transaction(s): [Continue](#)

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Select **Continue**

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

South Dakota  
checkout - kathy @ south dakota state government

shop cart (0) checkout approve

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

Transaction #: 011277 Transaction Name: 07/15/2014-13-23-Statsh-PHILIPS HEALTH Create Date: 7/15/2014 Supplier: PHILIPS HEALTHCARE Total Line Items: 2 Total Value: 1,375.40 USD	Payment Form: <input checked="" type="radio"/> Credit Card <input type="radio"/> PO Release Method: Manual Approval Workflow: Agency Workflow External Note: <a href="#">add attachments</a> Internal Note: <a href="#">add attachments</a> Commodity Code: 475 - HOSPITAL Fiscal Date: 07/15/2014 Purchase Order #: 15P0011277 Chart of Accounts: Indra Code: default GL Acct. Code: Select Account	Selection: Active Status: Unsubmitted Transaction System Note: None Next Step: Provide Missing Data
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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**

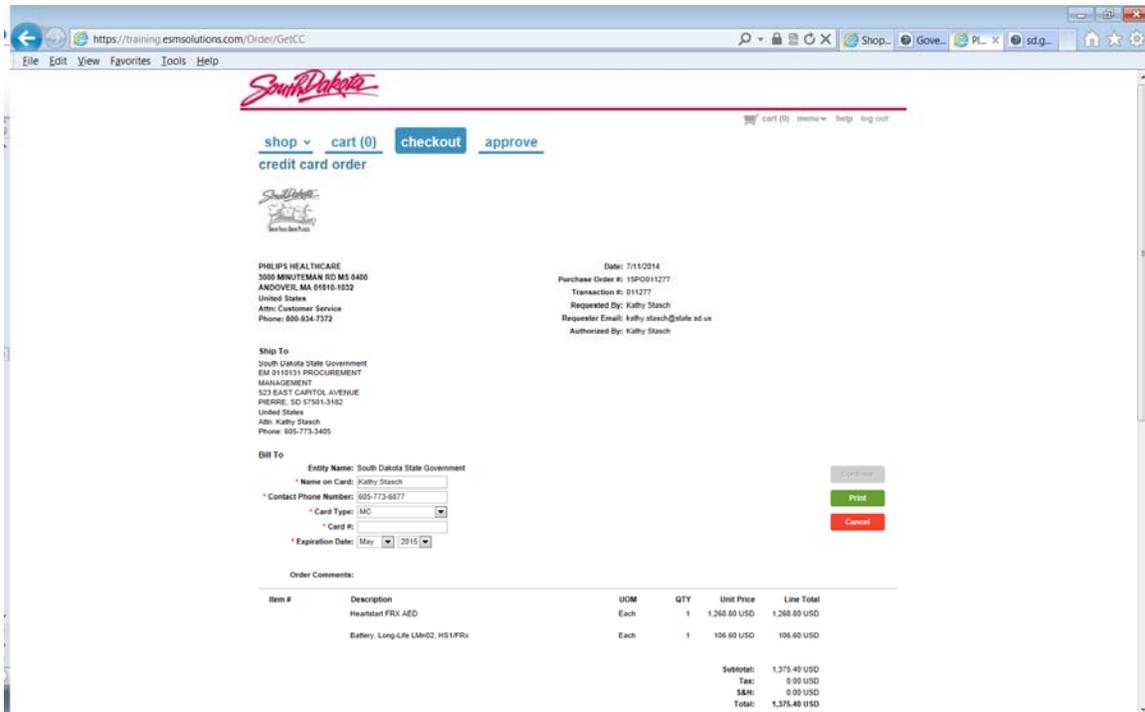
Requisition is now waiting for the Agency approval. When requisition has been approved, the creator of the requisition will receive an email stating the requisition has been approved and they may now write the purchase order and release it.

## 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 highlighted), 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-Stack-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 Selections (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:

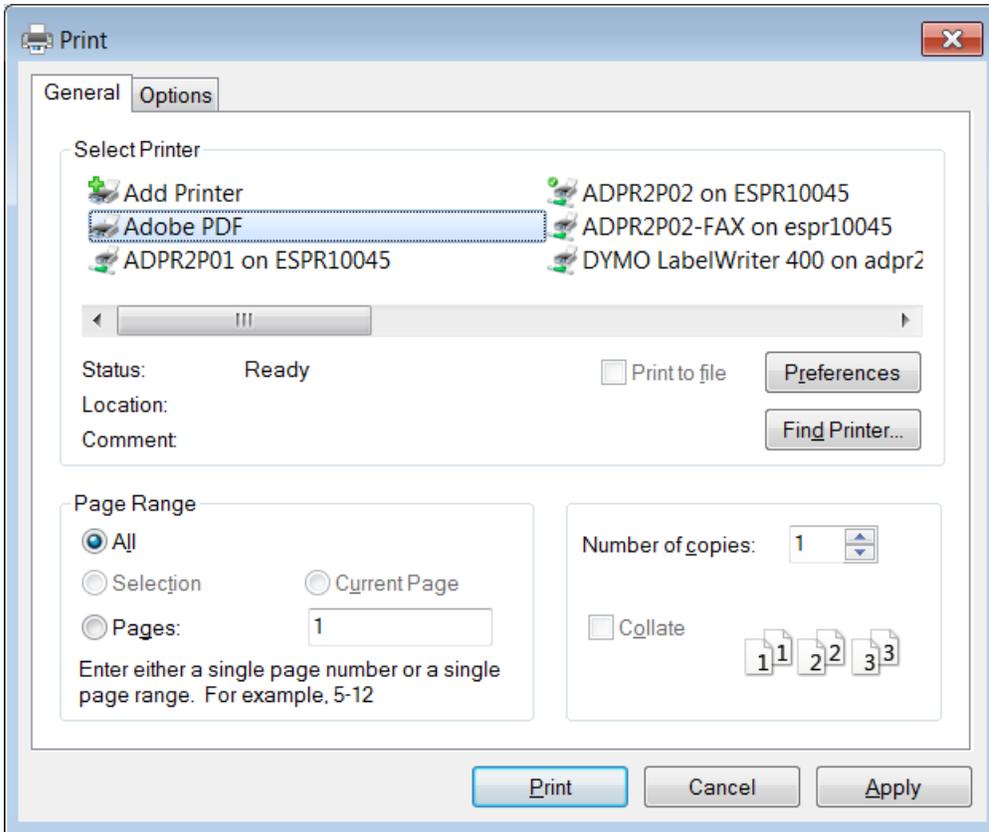
Contact Phone Number:

Card Type: **MC**

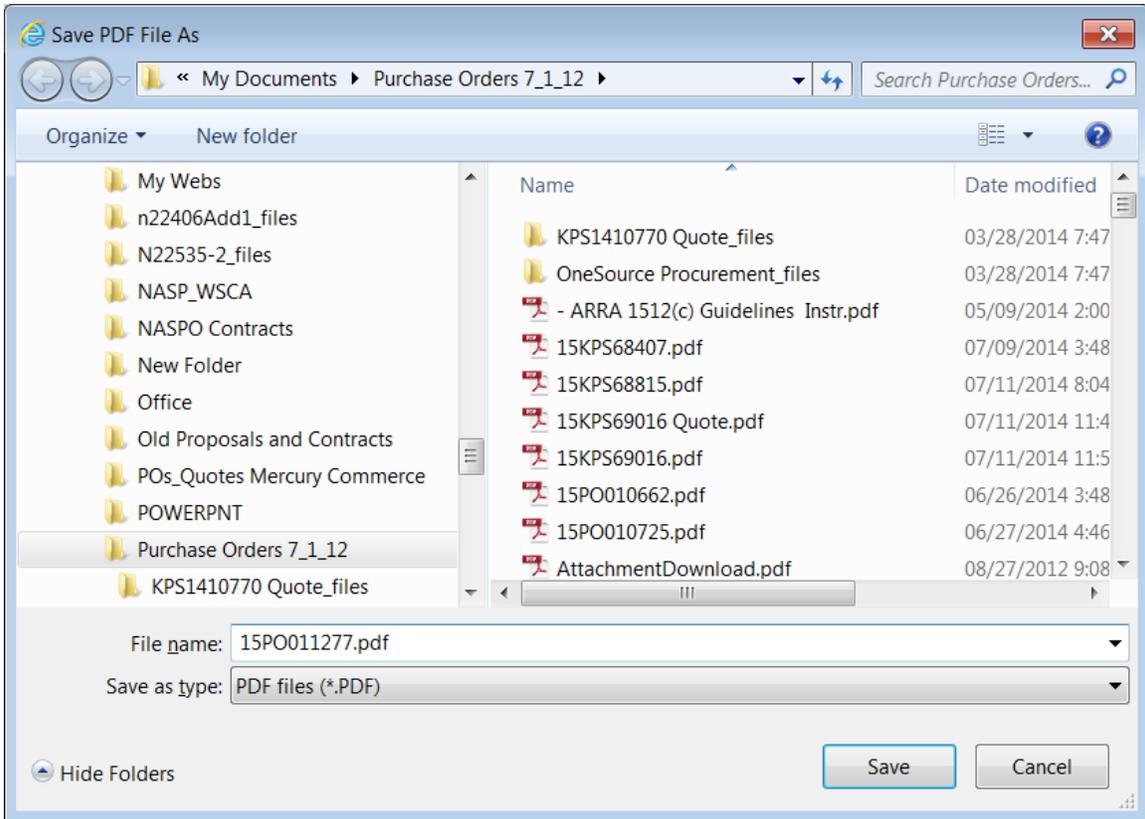
Card #: Use 5555555555554444 when in the training site, otherwise you will submit your actual credit card number in the live production site.

Expiration Date:

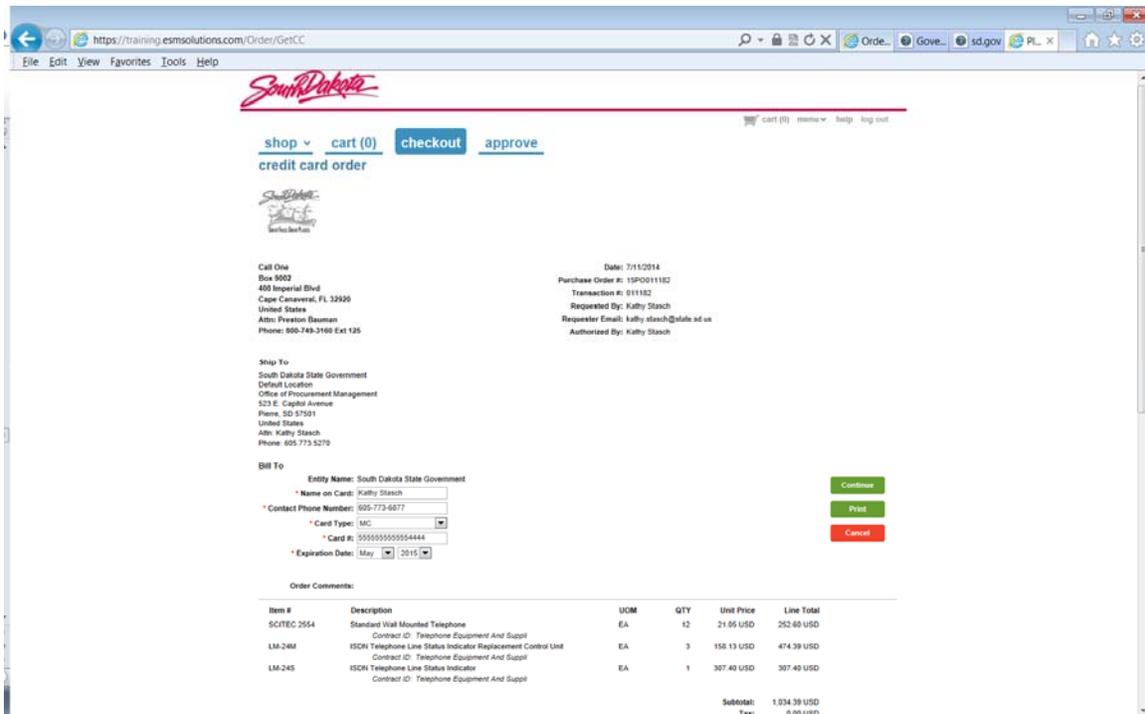
Select **Print**



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:	9.00 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.

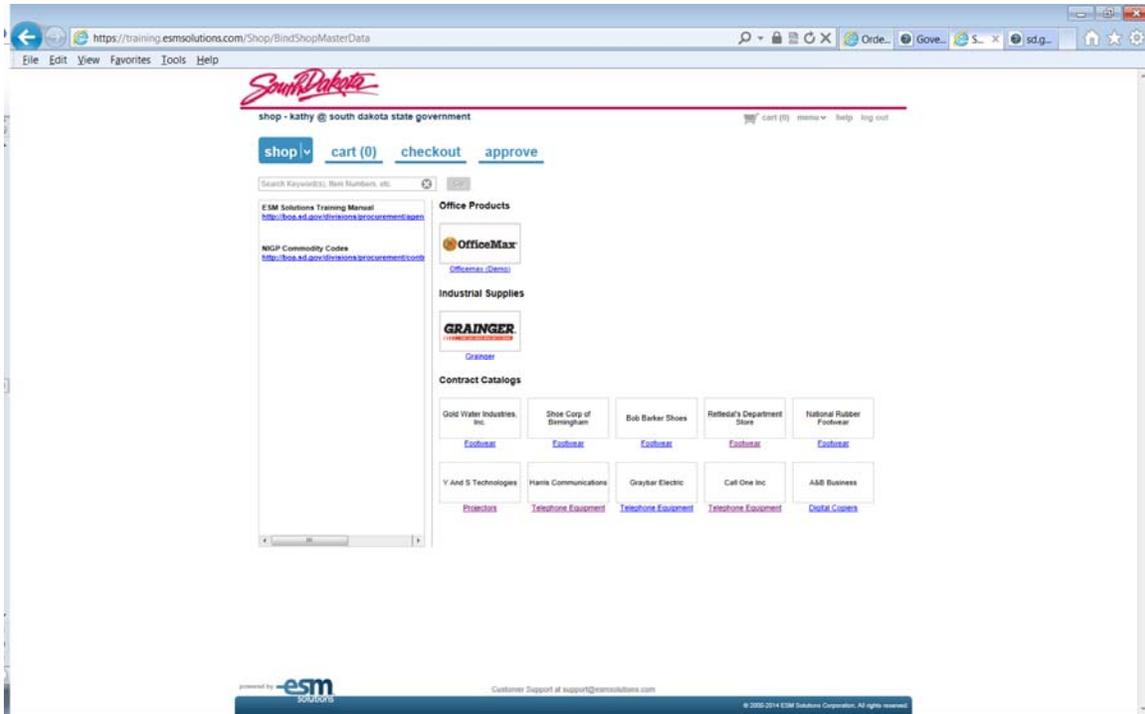
Send a copy of the purchase order as an attachment, in an email, to the vendor, and request a confirmation from the vendor that they received the purchase order.

### *Non-Catalog Direct Voucher - Purchases Under \$4000*

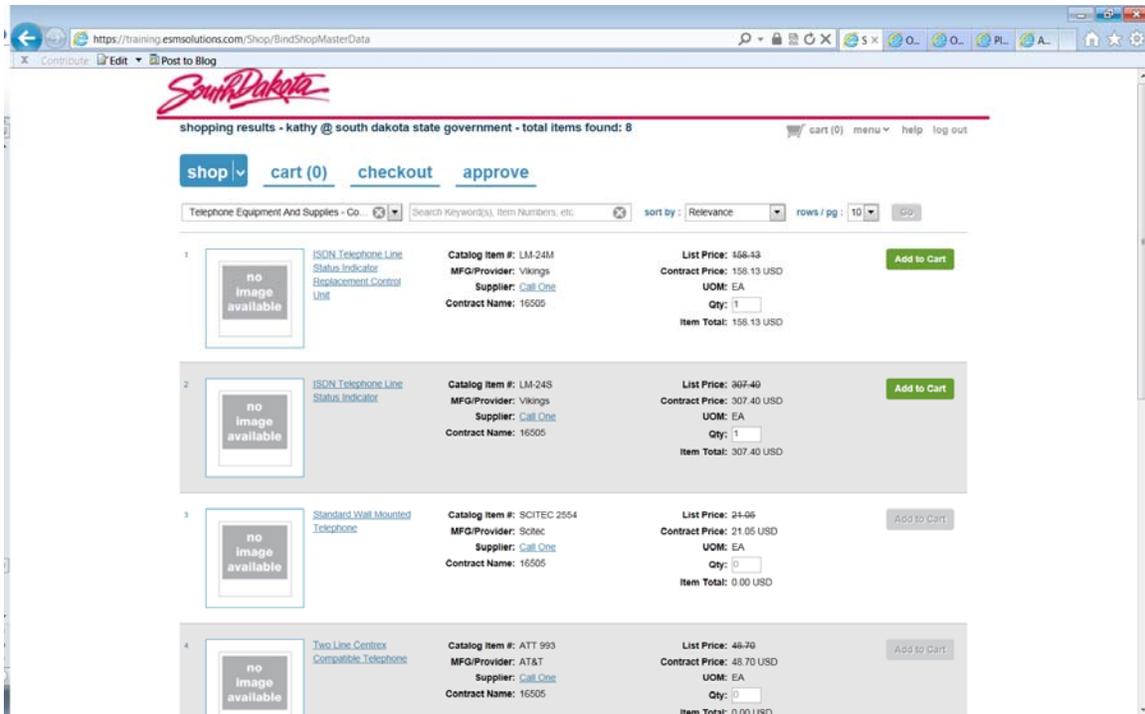
Follow all the steps as listed with *Non-Catalog Purchasing Card - Purchases Under \$4000* starting with page 12 but you will Select **PO** instead of Credit Card, **Release**, **Print** and **Continue**; you will not need to fill out the credit card information.

# Contract Catalog Item Purchases Under \$4000

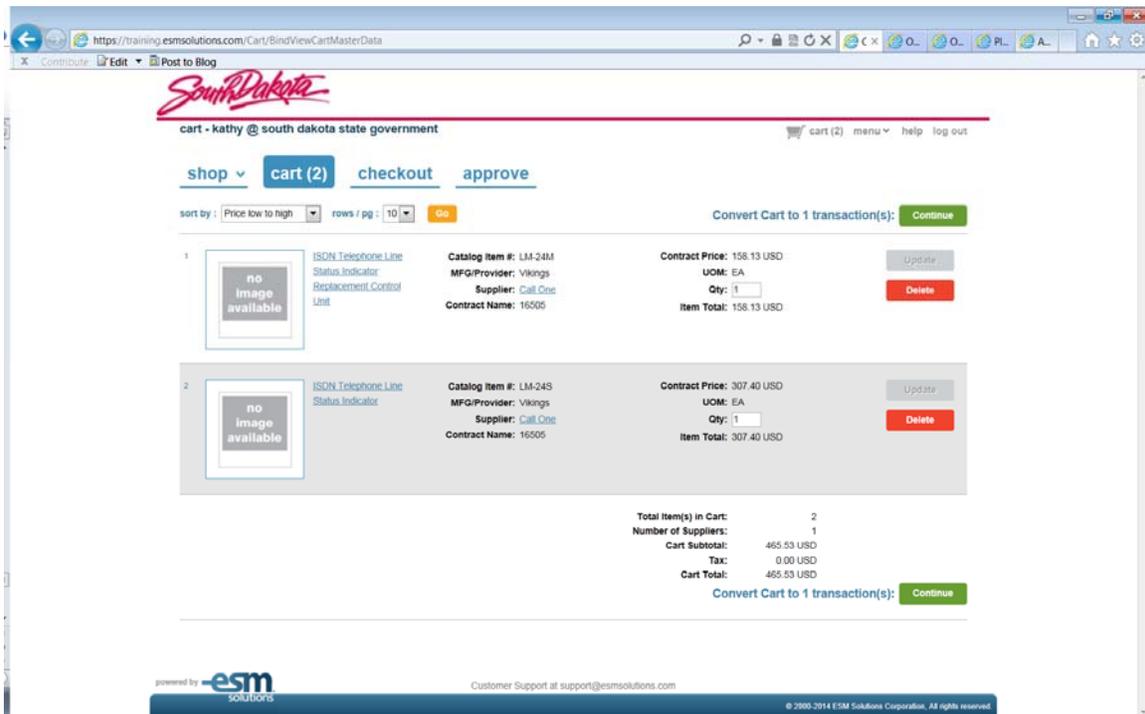
## *Contract Catalog Purchasing Card - Purchases Under \$4000*



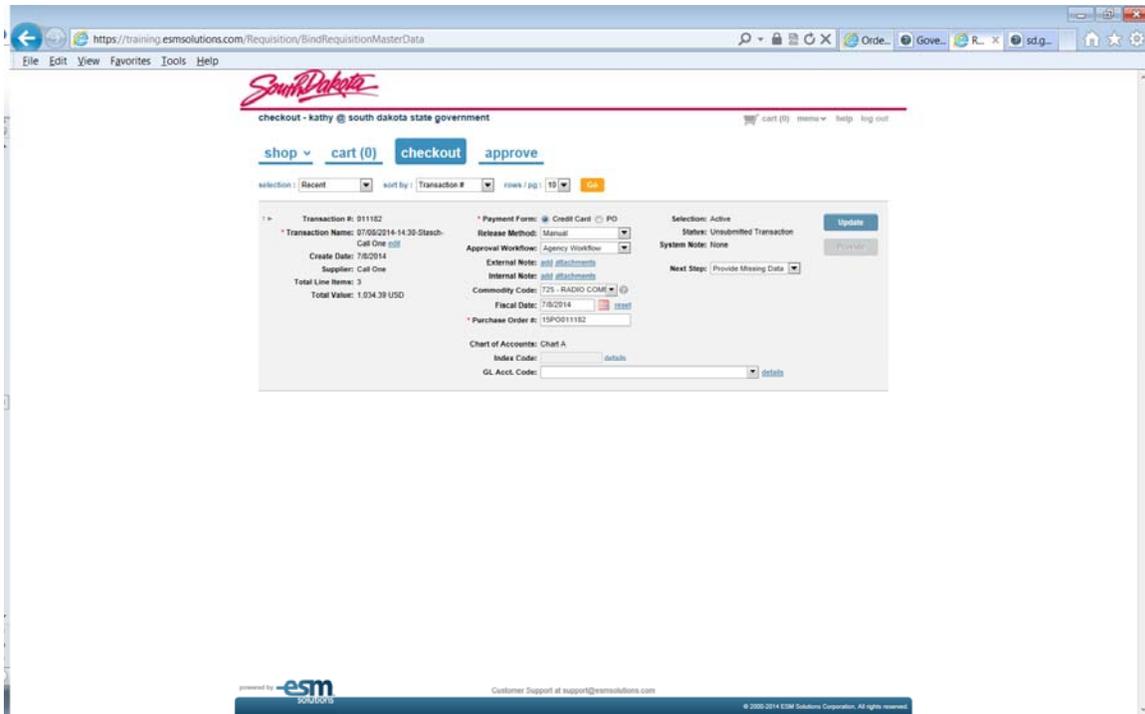
Select the Contract Catalog from the list of catalogs listed under the Contract Catalogs of the product you wish to purchase.



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**

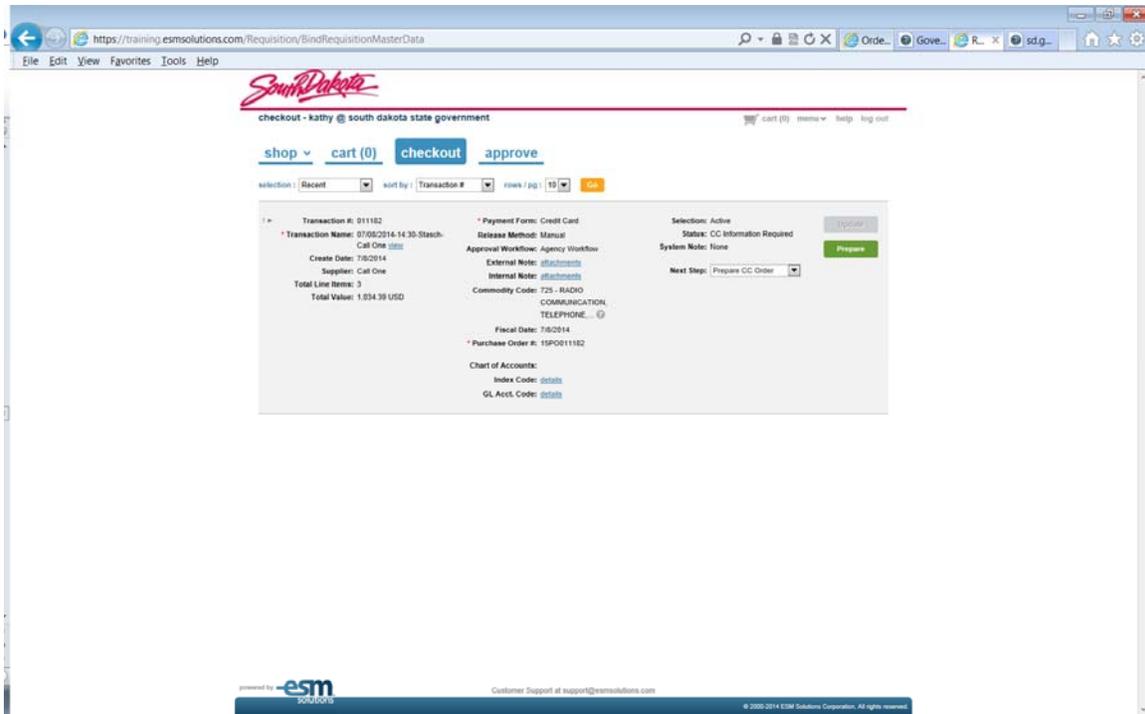
This is referred to as a Local Purchase Order which will not be encumbered through the State's accounting system.

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

Select **Update**

Select **Request**

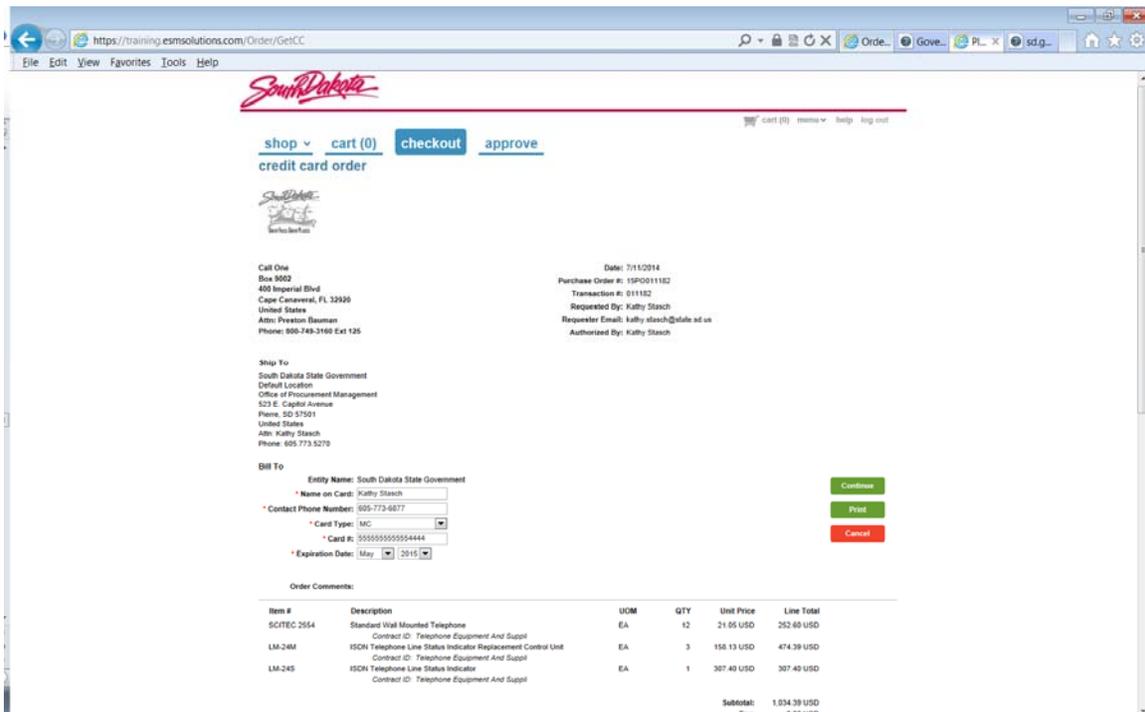
Requisition is now waiting for the Agency approval. When requisition has been approved, the creator of the requisition will receive an email stating the requisition has been approved and they may now write the purchase order and release it.



## 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:

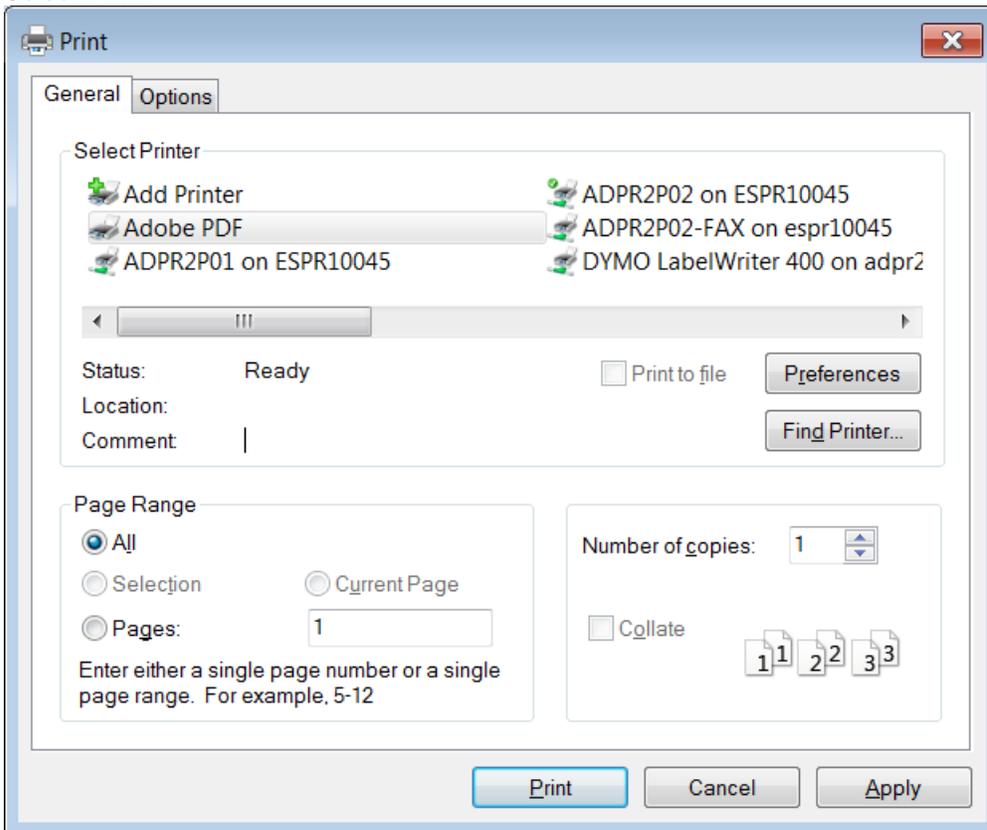
Contact Phone Number:

Card Type: **MC**

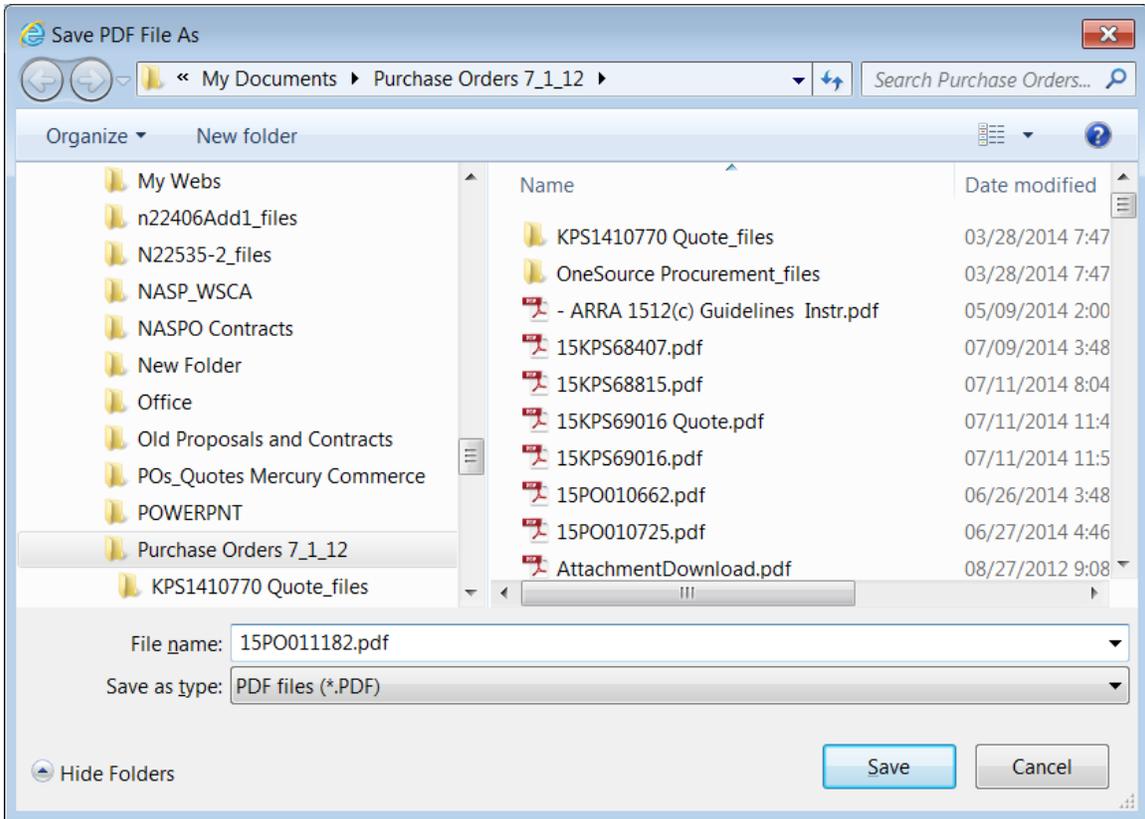
Card #: Use 5555555555554444 when in the training site, otherwise you will submit your actual credit card number in the live production site.

Expiration Date:

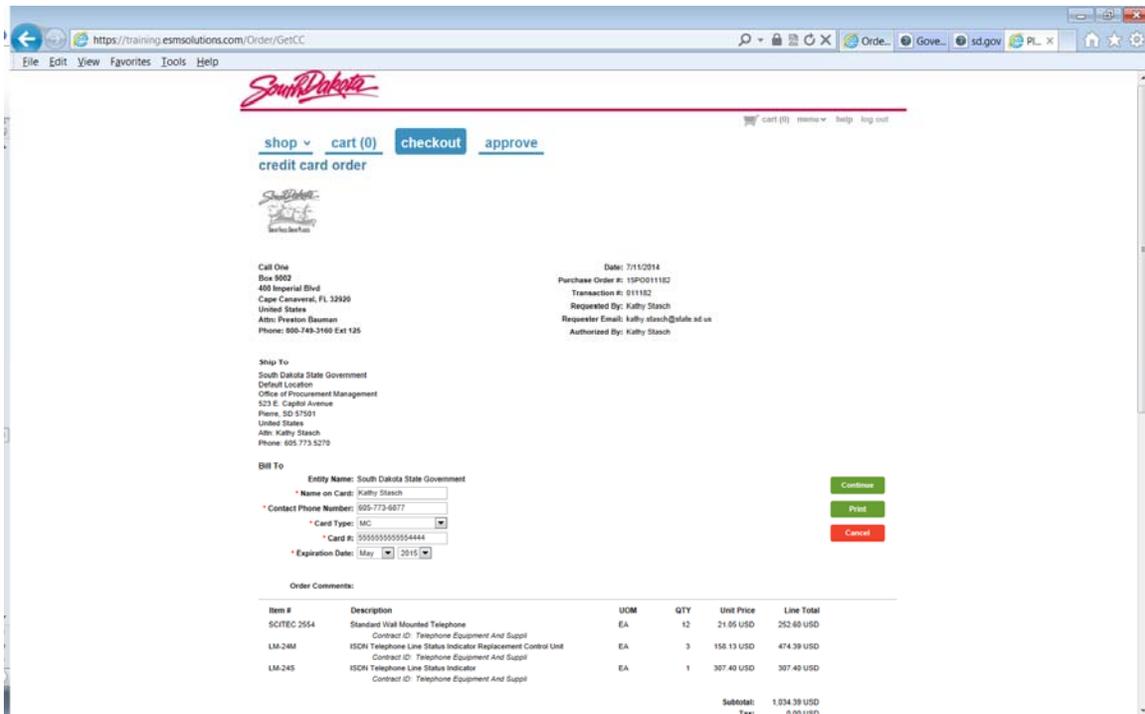
### Select Print



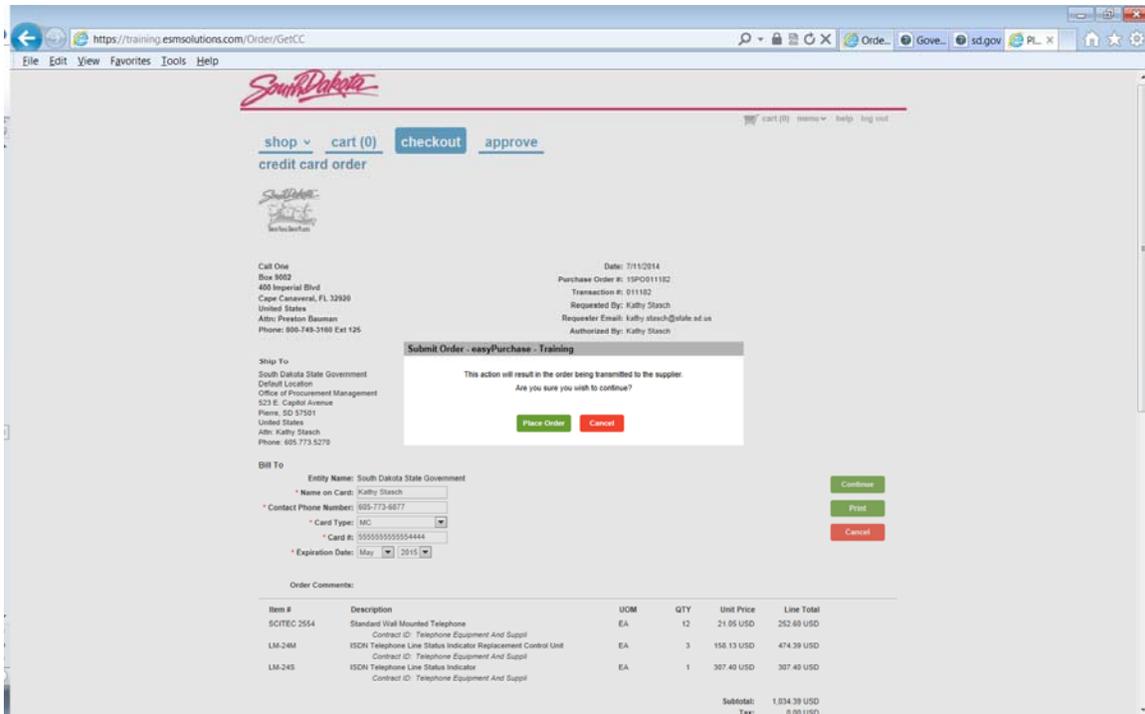
Select **Adobe PDF**, **Print and Save** in the file location you created for Purchase Orders. Name the file with the Local Purchase Number such as **15PO011182**.



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 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 for a user named 'kathy' from the South Dakota state government. The page features a navigation bar with 'shop', 'cart (0)', 'checkout', and 'approve' buttons. Below the navigation, there are filters for 'Recent' items and a 'Go' button. The main content area is a form for a transaction with ID 011200. Key details include: Transaction Name: 07/15/2014-14-37-Stack-A&B Business; Create Date: 7/15/2014; Supplier: A&B Business; Total Line Items: 1; Total Value: 1,522.00 USD. The form also includes fields for Payment Form (Credit Card or PO), Release Method (Manual), Approval Workflow (Encumbrance To OPM), External Note, Internal Note, Commodity Code (600 - OFFICE MAC), Fiscal Date (7/15/2014), Purchase Order # (011200), and Chart of Accounts (Index Code: default, GL Acct. Code: 1000-5295010000000000-0901001). The transaction status is 'Unsubmitted Transaction' and the next step is 'Provide Missing Data'.

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 with the URL <https://training.esmsolutions.com/Requisition/BindRequisitionMasterData>. 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'. The 'checkout' tab is active. Below the navigation, there are filters for 'selection' (Recent) and 'sort by' (Transaction #). The main content area displays transaction details for Transaction # 011200, including Transaction Name, Create Date, Supplier, Total Line Items, and Total Value. 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 'Cancel' 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**

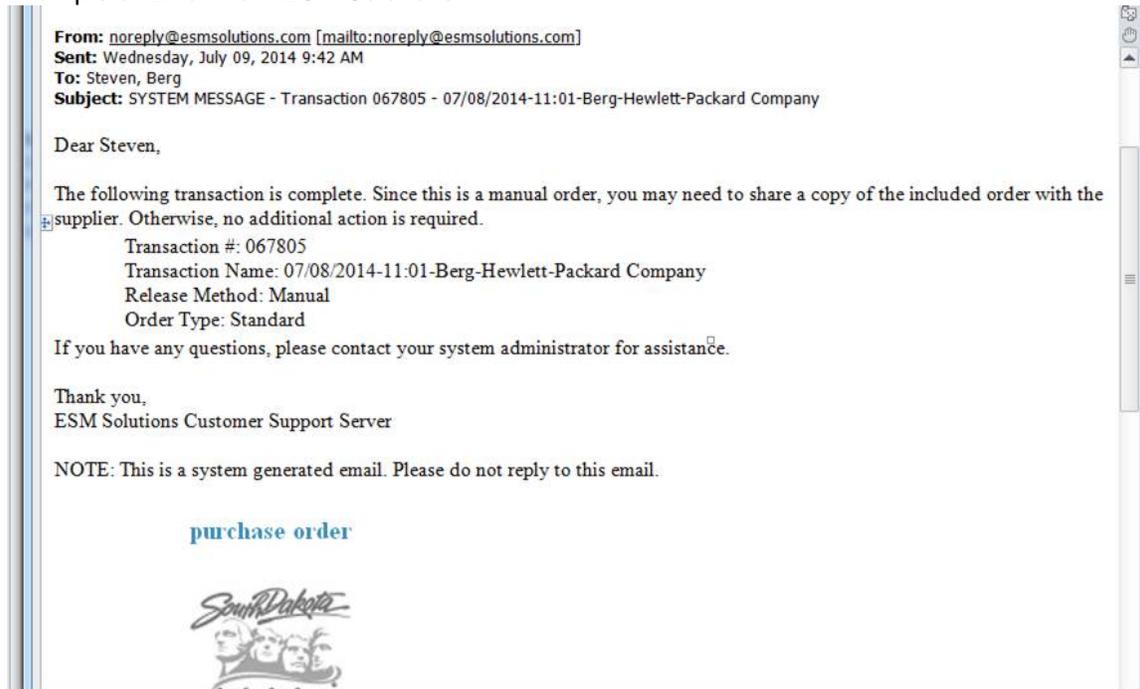
Select **Request**

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

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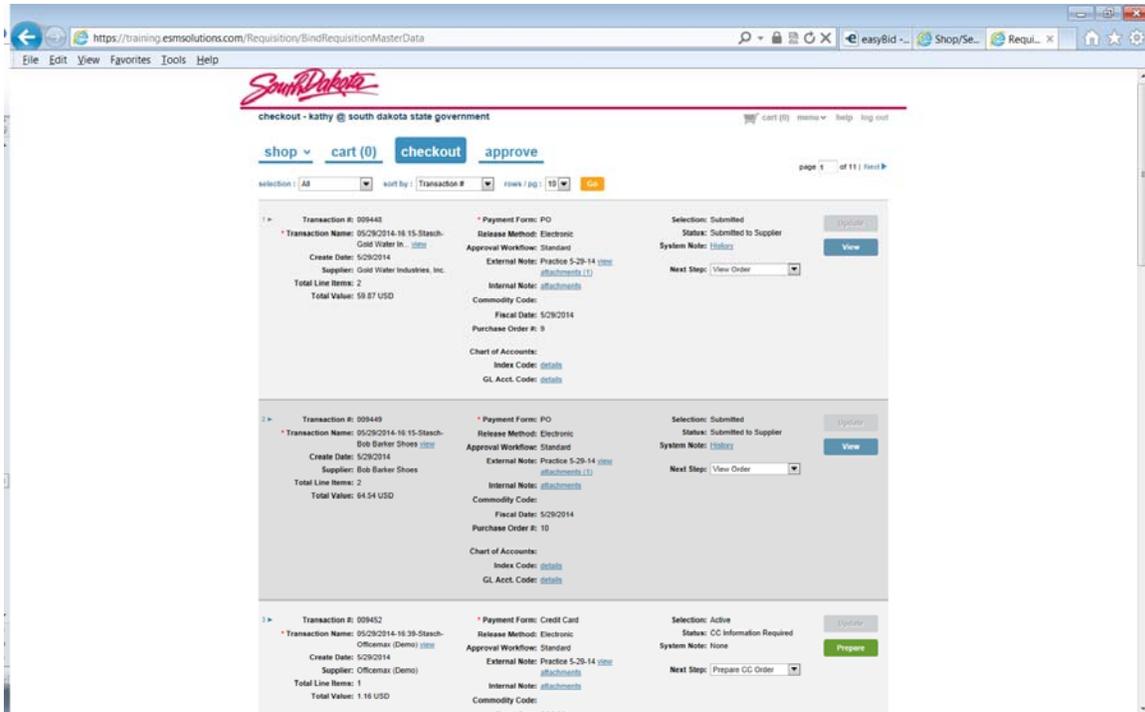
**Do not use this feature; this feature does not work the way we were initially instructed to use it.**

You are not able to add an individual to a requisition for their review. Instead you can attach an email in the Internal Notes-Attachment of the requisition with the individual's approval, account code information or any other pertinent information you would like with the requisition.

# 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
<b>Subtotal:</b>					59.87 USD
<b>Tax:</b>					0.00 USD
<b>S&amp;H:</b>					0.00 USD
<b>Total:</b>					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

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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

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### *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

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## *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

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## *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

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## *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

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### *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**

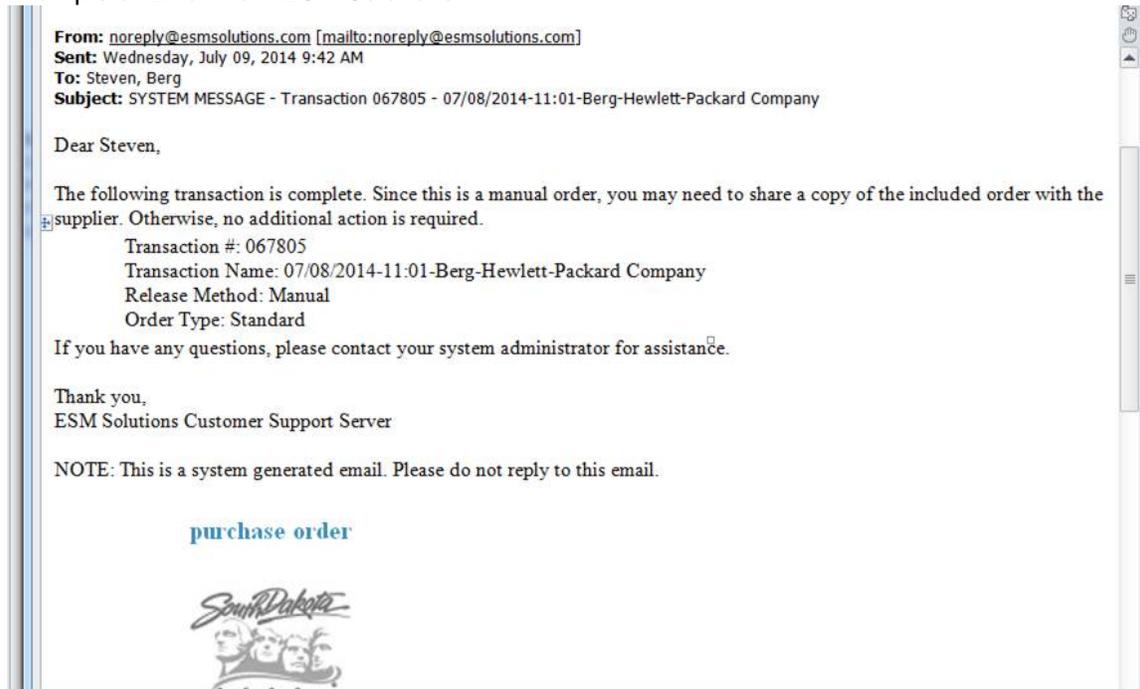
Select **Request**

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

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**Do not use this feature; this feature does not work the way we were initially instructed to use it.**

You are not able to add an individual to a requisition for their review. Instead you can attach an email in the Internal Notes-Attachment of the requisition with the individual's approval, account code information or any other pertinent information you would like with the requisition.

# How to Print a Purchase Order for later use

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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**