

UNIVERSITY OF NEW MEXICO

FIN PU-101 Purchasing Processes for Departments Lab

LOBO MART



UNM eProcurement

Participant Guide

Table of Contents

Confidentiality and Sensitive Information	2
Course Pre-requisites	3
Course Overview	4
Section 1 LoboMart	6
<ul style="list-style-type: none">• Create 'My Profile'• Place Orders with Catalog Vendors• Place Orders with Non - Catalog Vendors• Set Up and Order from a Vendor not currently in LoboMart• Place Orders with a Punchout Vendor• Check the Status of a Requisition	
<ul style="list-style-type: none">• Process Flow Charts:<ul style="list-style-type: none">- Purchase Goods from an External Vendor- Purchase Services from an External Vendor	54 55
Section 2 Receiving Goods	56
Section 3 Procurement Card Maintenance	60
Process Flow Chart- Reallocate P-Card Charges	
Section 4 Change Order and Vendor Requests	61
Course Wrap Up	62
Job Aids	63

UNM Confidentiality and Sensitive Information Policy

Due to the integrated nature of the various Finance modules in Banner and the reporting information in the Operational Data Store (ODS) you may have access to information beyond what you need to perform your assigned duties. Your access to Banner has been granted based on business need and it is your responsibility to ensure the information you access is used appropriately. Here are some reminders of good data stewardship to help you carry out your responsibility:

- Do not share, disclose or store your passwords in an unsecured manner.
- Do not share confidential and sensitive information with anyone, including colleagues, unless there is a business reason.
- Do not leave your workstation unattended while logged on to administrative information systems. You are responsible for any activity that occurs using your password.
- Do not attempt to access accounts, files, or information belonging to others without knowledge or consent.
- Do not use your computer account to engage in any form of illegal software copying or other copyright infringement.
- Do not use your account to harass other computer users.
- Retrieve printed reports quickly and do not leave the reports lying around in plain view.
- Secure reports containing confidential and sensitive information.
- Shred reports containing confidential or sensitive information in a timely manner.

Your responsibilities regarding the protection and security of administrative information are outlined in the University of New Mexico Policies and Procedures Manual:

- | | |
|----------------------------------------------|------------------------|
| • Acceptable Computer Use | Policy No. <u>2500</u> |
| • Computer Use Guidelines | Policy No. <u>2510</u> |
| • Computer Security Controls and Guidelines. | Policy No. <u>2520</u> |

Use of University computing services in violation of applicable laws or University policy may result in sanctions, including withdrawal of use privilege; disciplinary action, up to and including, expulsion from the University or discharge from a position; and legal prosecution under applicable federal and/or state law.

Prerequisites for the Class

- FIN OV 100 General Finance Online Overview
- FIN BAS100 Banner Fundamentals and Navigation Online Training

Course Overview

We now accept the fact that learning is a lifelong process of keeping abreast of change. The most pressing task now is to teach people how to learn.
– Peter Drucker

Course Description

This course is designed to introduce the participant to the purchasing process for departments. The objectives of this session include creating, canceling, and querying Purchase Requisitions (PR's); performing queries of purchasing documents in Banner; and approving invoices for payment. You will learn how to purchase goods and services and become familiar with using the online Vendor Add/Change Request form and the online Purchase Order (PO)/Purchase Requisition (PR) Change Order form. You will also learn how to receive goods and services.

This course will provide an introduction and hands-on learning using LoboMart for creating and tracking Purchase Requisitions.

You will also participate in an introduction and hands on learning using the Banner Receiving Goods form FPARCVD to receive goods.

Participants are instructed where to access and how to use the online Banner Byte for PCard Reallocation.

Course Objectives

After completing this session you will be able to:

- Initiate a Purchasing Request in LoboMart
- Know the difference between Catalog and Non-Catalog Vendors
- Track the Status of a Requisition in LoboMart and Banner
- Receive Goods & Services
- Initiate a Change Order Request
- Initiate a New Vendor Set-Up Request

Additional training materials, including Banner Byte demos, for:

- **Creating a Receiving Document for Goods**
- **Procurement Card (PCard) Transaction Maintenance/ Reallocation**
- **Returned Goods**
- **Searching for Requisitions in LoboMart**
- **And many more processes...**

can be found on the Financial Services Support Center website.

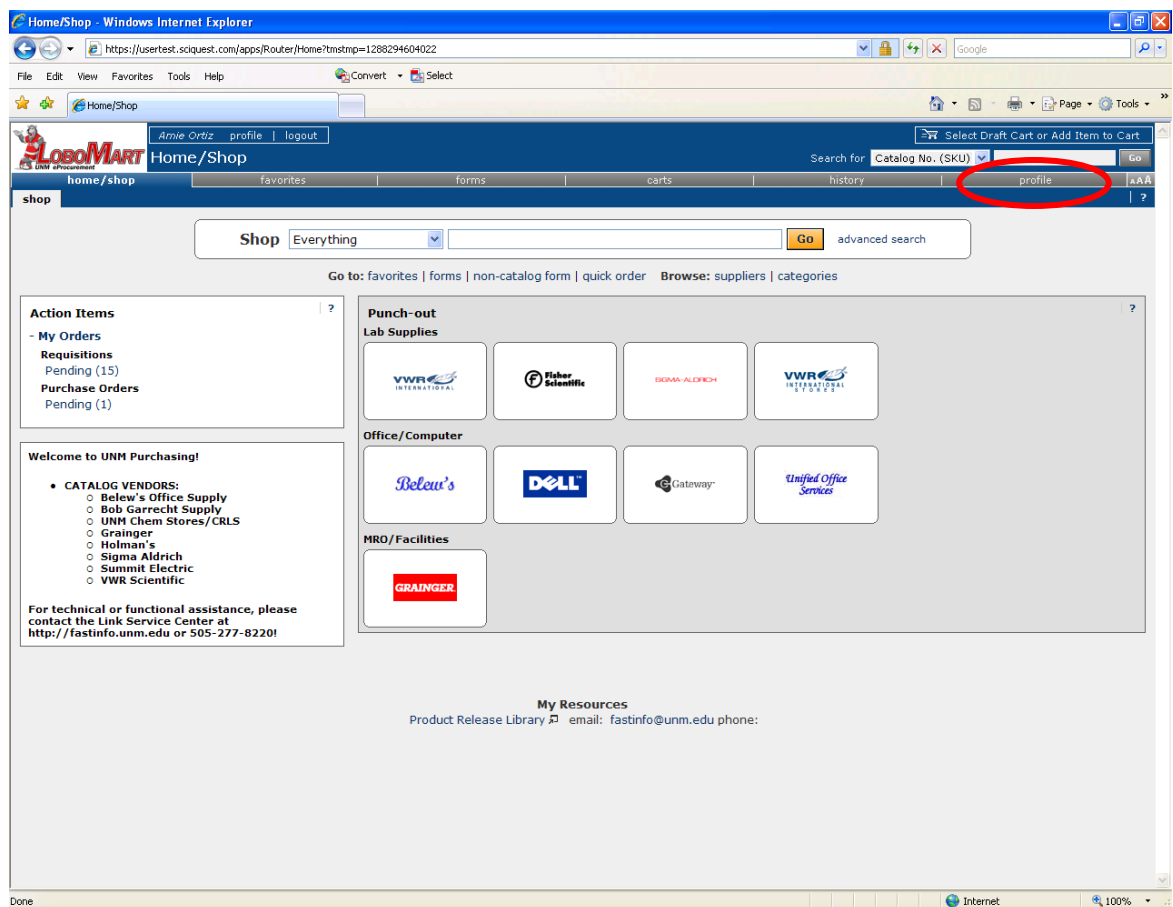
<http://www.unm.edu/~fssc>

Section 1 – LoboMart

LoboMart is a web eProcurement application used to create all external purchase requisitions. LoboMart automatically passes data into the Banner system.

Exercise 1 – Create 'My Profile'

When logging in to LoboMart for the first time, it is necessary to set up your personal profile. The initial set-up is a one-time process and must be completed prior to creating any requisitions. Adding new index codes, ship-to codes, etc is also done using My Profile.



1. Click on the **profile** link from the LoboMart home page.

My Profile - Windows Internet Explorer

https://usertest.sciquest.com/apps/Router/UserProfileUserIdentification?tmstp=1288294607379

File Edit View Favorites Tools Help

My Profile

Amie Ortiz profile | logout

Search for Catalog No. (SKU) Go

home/shop favorites forms carts history profile

change Password

User Settings Purchasing Permissions History

User Identification Personal Settings Roles Department Permissions Email Preferences

First Name Amie

Last Name Ortiz

Phone Number 1 505 277-5225 Country Code, Area, Phone Number, Extension

E-mail Address aortiz@unm.edu

User Name aortiz

Please enter a question and answer that we can prompt you with should you ever forget your password.

Question

Answer

Confirm Answer

Authentication Method Local

Save

2. On the **My Profile** page, begin in the **User Settings** tab. There are four sections in **User Settings**: **User Identification**, **Personal Settings**, **Roles**, and **Email Preferences**.

3. **User Identification (Required Data)** – Your first name, last name, and user name will be pre-populated and cannot be changed. You must add a contact phone number and email address, then click on the **Save** button.

My Profile - Windows Internet Explorer

https://usertest.sciquest.com/apps/Router/UserProfilePersonalSettings?UserId=4290608&LeftNav=8&tmstp=1288295510592

File Edit View Favorites Tools Help

My Profile

Amie Ortiz profile | logout

Search for Catalog No. (SKU) Go

home/shop favorites forms carts history profile

change Password

User Settings Purchasing Permissions History

User Identification Personal Settings Roles Department Permissions Email Preferences

Select a Language

Country

Time Zone MDT/MST - Mountain Standard Time

Color Theme SciQuest New

Font Size

Help on mouse over

Save

4. **Personal Settings (System Defaulted)** - The color theme, time zone, user interface style and help settings will be set system wide. Do not change the time zone default. The color theme, interface style and help settings can be changed. Choose the desired options from the drop down lists and click on the **Save** button.

Email Preference	Value	Override Role
Administration & Integration		
PR Export Failure Notification	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Shopping, Carts & Requisitions		
PR submitted into Workflow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PR Workflow complete / PO created	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PR line item(s) rejected	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PR rejected/returned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Purchase Orders		
PO submitted into Workflow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PO Workflow complete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PO sent to supplier	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PO Line Item Ship Notice	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PO line item(s) rejected	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PO rejected	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PO line item Backorder notice	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PO line item Cancellation notice	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Settlement		
PO Requires Receipt notice	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

5. **Email Preferences (Optional)** - An email notice can be sent to the user for any PR process selected. *At the University PO processes are not utilized.* Select those processes for which you would like email notification sent by placing a **checkmark** in the corresponding checkbox and clicking on the **Save** button.

Custom Field Name	Default Value	Description	Edit Value
Product Location	No Default Value		<input type="button" value="Edit"/>

6. Click on the **Purchasing** tab. There are six sections in the **Purchasing** tab: **Custom Fields**, **Purchasing/Approval Limits**, **Payment Options**, **Addresses**, **Product Views**, and **Punchout Access**. *Purchasing/Approval Limits, Product Views, and Punchout Access are for informational purposes only.*

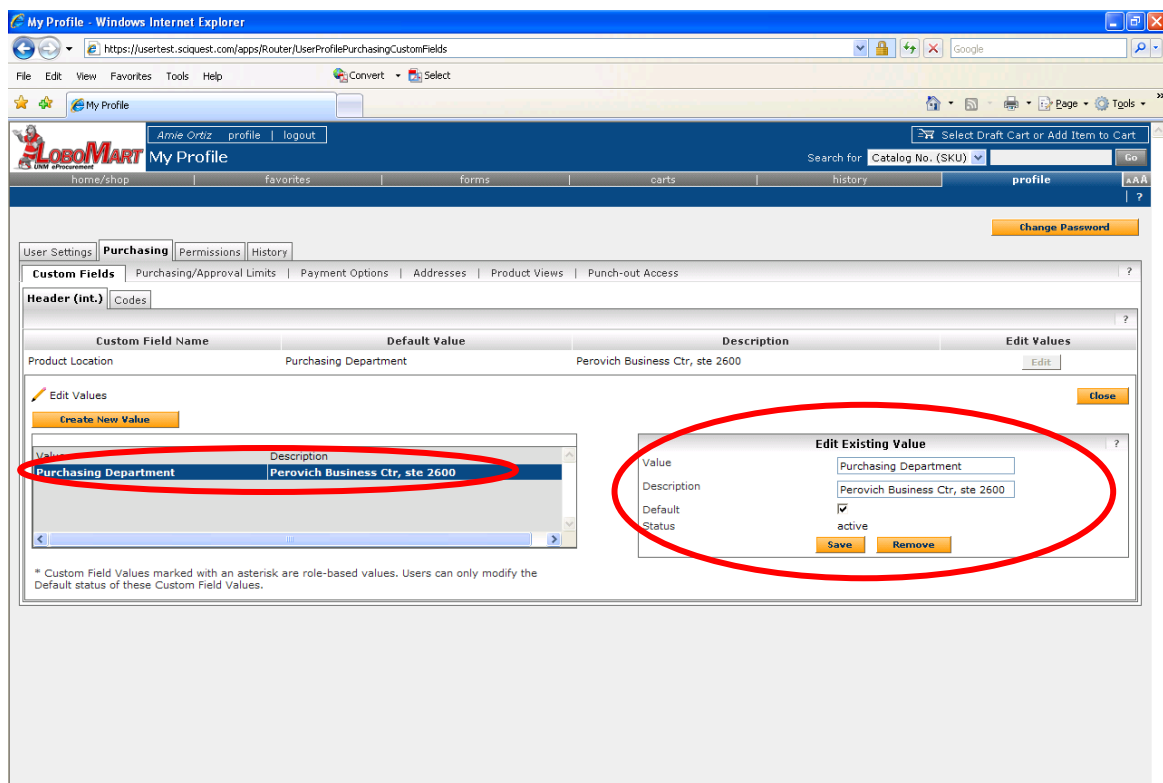
7. **Custom Fields (Required Data)** – The screen defaults to the Header tab. A Product Location is required for all Requisitions. Click on the **Edit** button to add a Product Location.

The screenshot shows a web browser window titled 'My Profile - Windows Internet Explorer'. The URL is 'https://usertest.sqquest.com/apps/Router/UserProfilePurchasingCustomFields'. The page has a navigation bar with 'home/shop', 'favorites', 'forms', 'carts', and 'history'. The 'My Profile' section is active, showing 'User Settings', 'Purchasing', 'Permissions', and 'History'. Under 'Purchasing', there are sub-tabs: 'Custom Fields', 'Purchasing/Approval Limits', 'Payment Options', 'Addresses', 'Product Views', and 'Punch-out Access'. The 'Custom Fields' tab is selected, showing a table with columns: 'Custom Field Name', 'Default Value', 'Description', and 'Edit Values'. The table has one row: 'Product Location' with 'No Default Value'. Below the table, there is a 'Create New Value' button highlighted with a red circle. A 'Close' button is also visible.

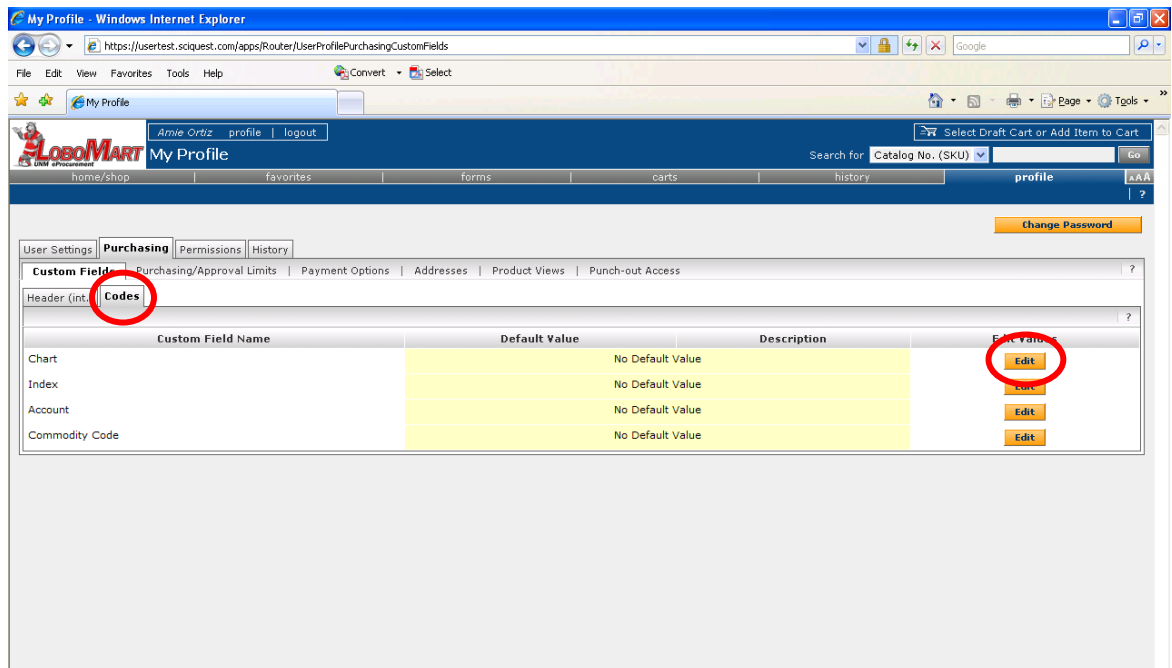
8. Click on the **Create New Value** button to create a new Product Location. The Product Location is the area where the goods are stored upon receipt.

The screenshot shows the same web browser window, but now the 'New Value' form is open. The form is titled 'New Value' and has fields for 'Value', 'Description', 'Default', and 'Status'. The 'Value' field contains 'Purchasing Department' and the 'Description' field contains 'Perovich Business Ctr, ste 2600'. The 'Default' checkbox is checked, and the 'Status' is set to 'active'. A 'Save' button is at the bottom of the form. The 'Create New Value' button from the previous screenshot is still visible and highlighted with a red circle.

9. Enter the product location in the **Value** and **Description** textboxes. Enter the Product Location name in the **Value** textbox. Enter the building name and room number in the **Description** textbox. If this is the primary Product Location, place a checkmark in the **Default** checkbox. Click on the **Save** button when all information has been entered.

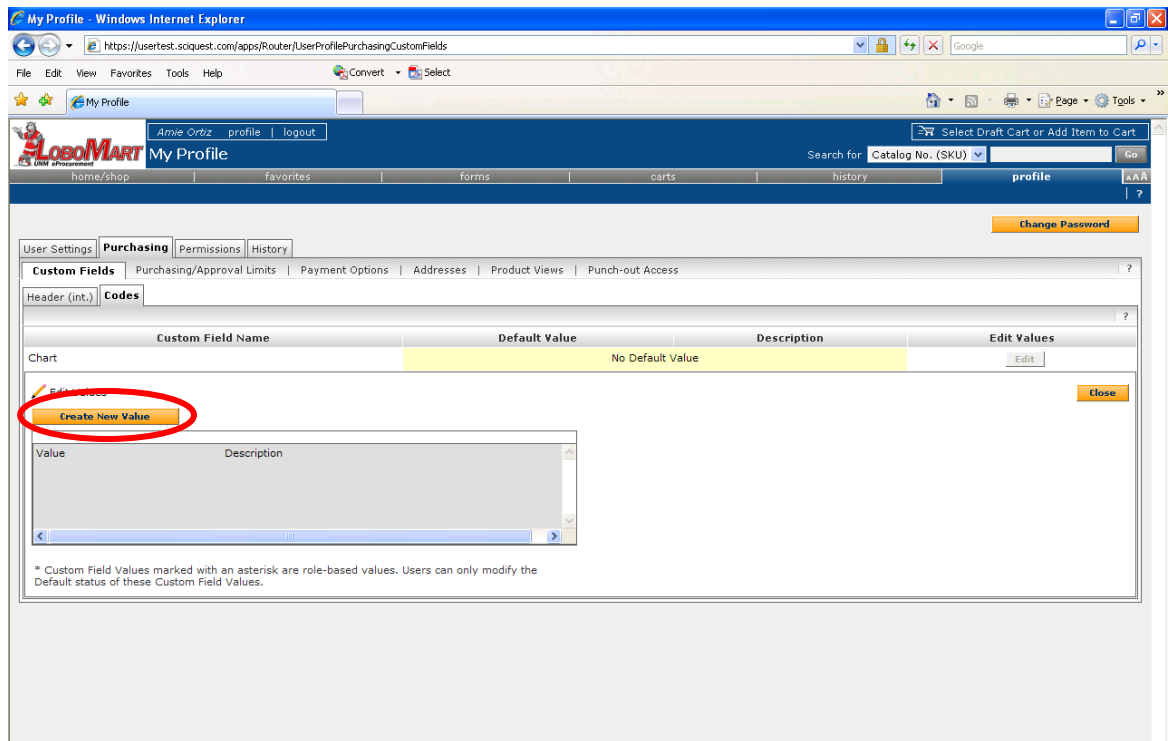


10. The product location is now saved to your profile. To remove or change a product location click on the product location in the **Value Description** list. Click on the desired action in the **Edit Existing Value** box.

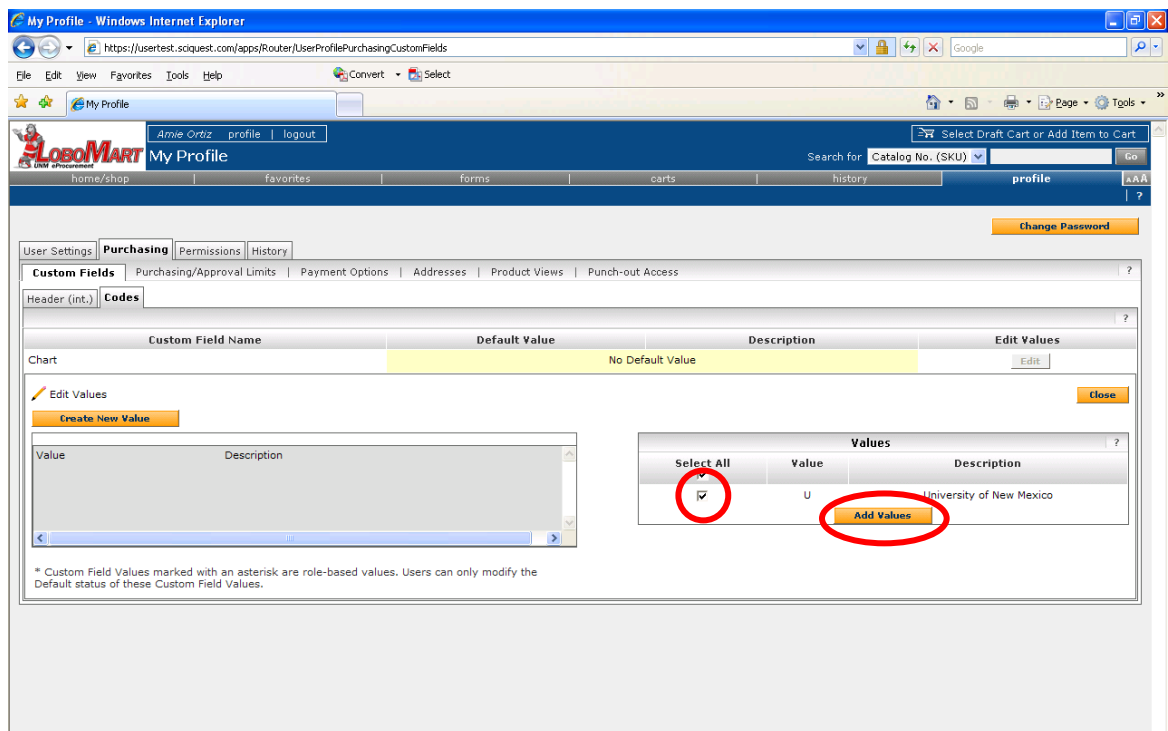


11. Click on the **Codes** tab. There are four codes that can be entered: **Chart**, **Index**, **Account**, and **Commodity Code**.

12. You must enter a default **Chart**. Click on the **Edit** button to the right of **Chart**.



13. Click on the **Create New Value** button to add a **Chart**.



14. Place a checkmark in the Select checkbox next to **Chart U** and click on the **Add Value** button.

15. **Chart U** has now been added to your profile, but it must still be set as your default chart.

My Profile - Windows Internet Explorer

https://usertest.squest.com/apps/Router/UserProfilePurchasingCustomFields

Amie Ortiz profile | logout

My Profile

Search for Catalog No. (SKU) Go

home/shop favorites forms carts history profile

Change Password

User Settings Purchasing Permissions History

Custom Fields Purchasing/Approval Limits Payment Options Addresses Product Views Punch-out Access

Header (int.) Codes

Custom Field Name	Default Value	Description	Edit Values
Chart	No Default Value		Edit

Edit Values

Create New Value

Value Description

U University of New Mexico

Edit Existing Value

Value U

Description University of New Mexico

Default ☒ active

Status

Save Remove

Close

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

16. Click on **Chart U** to open the **Edit Existing Value** screen. Place a checkmark in the Default checkbox and click on the **Save** button. Now that **Chart U** has been set as your default **Chart**, click on the **Close** button to return to the **Codes** list.

My Profile - Windows Internet Explorer

https://usertest.squest.com/apps/Router/UserProfilePurchasingCustomFields

Amie Ortiz profile | logout

My Profile

Search for Catalog No. (SKU) Go

home/shop favorites forms carts history profile

Change Password

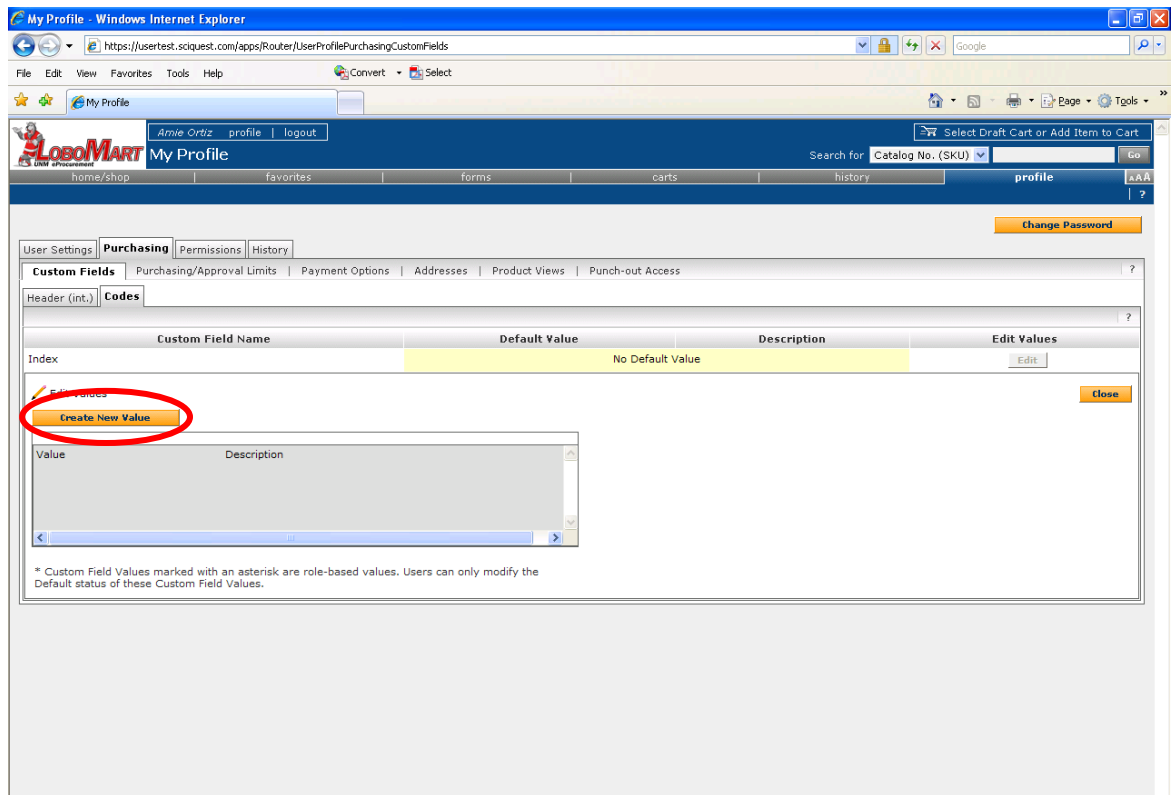
User Settings Purchasing Permissions History

Custom Fields Purchasing/Approval Limits Payment Options Addresses Product Views Punch-out Access

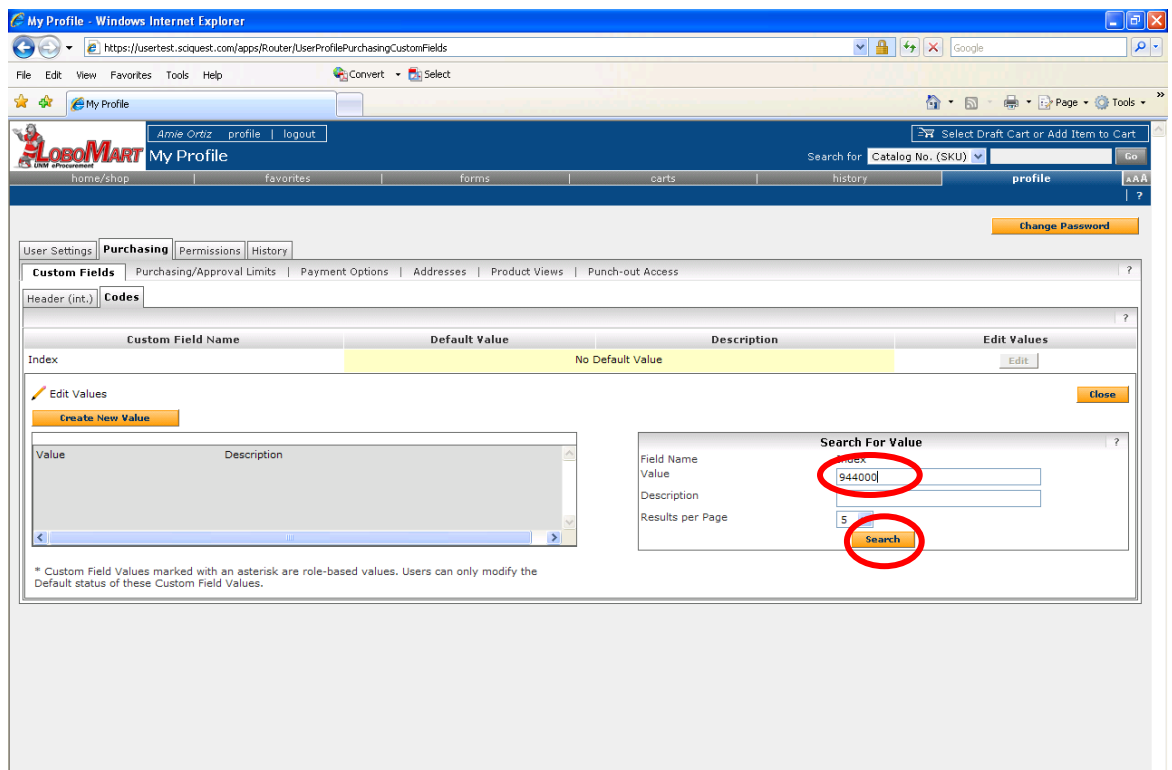
Header (int.) Codes

Custom Field Name	Default Value	Description	Edit Values
Chart	U	University of New Mexico	Edit
Index	No Default Value		Edit
Account	No Default Value		Edit
Commodity Code	No Default Value		Edit

17. Index, Account, and Commodity Codes are not required as part of your profile, but it is helpful to include at least one Index Code and several Account and Commodity Codes. Click on the **Edit** button located to the right of the Index line to add an Index Code.



18. Click on the **Create New Value** button.



19. Enter the Index code in the **Value** textbox or enter the Index description in the **Description** textbox and click on the **Search** button.

My Profile - Windows Internet Explorer

https://usertest.squest.com/apps/Router/UserProfilePurchasingCustomFields

File Edit View Favorites Tools Help

My Profile

Amie Ortiz profile | logout

Search for Catalog No. (SKU) Go

home/shop favorites forms carts history profile

Change Password

User Settings **Purchasing** Permissions History

Custom Fields Purchasing/Approval Limits Payment Options Addresses Product Views Punch-out Access

Header (int.) Codes

Custom Field Name	Default Value	Description	Edit Values
Index	No Default Value		Edit

Edit Values

Create New Value

Value	Description
944000	113425-Purchasing Operations 092805

Results per Page 5 Values Found 1

Select	Value	Description
<input checked="" type="checkbox"/>	944000	113425-Purchasing Operations 092805

Add Values Back to Search

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

20. Place a checkmark in the Select checkbox next to the index code(s) you wish to add and click on the **Add Values** button.

My Profile - Windows Internet Explorer

https://usertest.squest.com/apps/Router/UserProfilePurchasingCustomFields

File Edit View Favorites Tools Help

My Profile

Amie Ortiz profile | logout

Search for Catalog No. (SKU) Go

home/shop favorites forms carts history profile

Change Password

User Settings **Purchasing** Permissions History

Custom Fields Purchasing/Approval Limits Payment Options Addresses Product Views Punch-out Access

Header (int.) Codes

Custom Field Name	Default Value	Description	Edit Values
Index	No Default Value		Edit

Edit Values

Create New Value

Value	Description
944000	113425-Purchasing Operations 092805

Search For Value

Field Name Index

Value 944000

Description

Results per Page 5

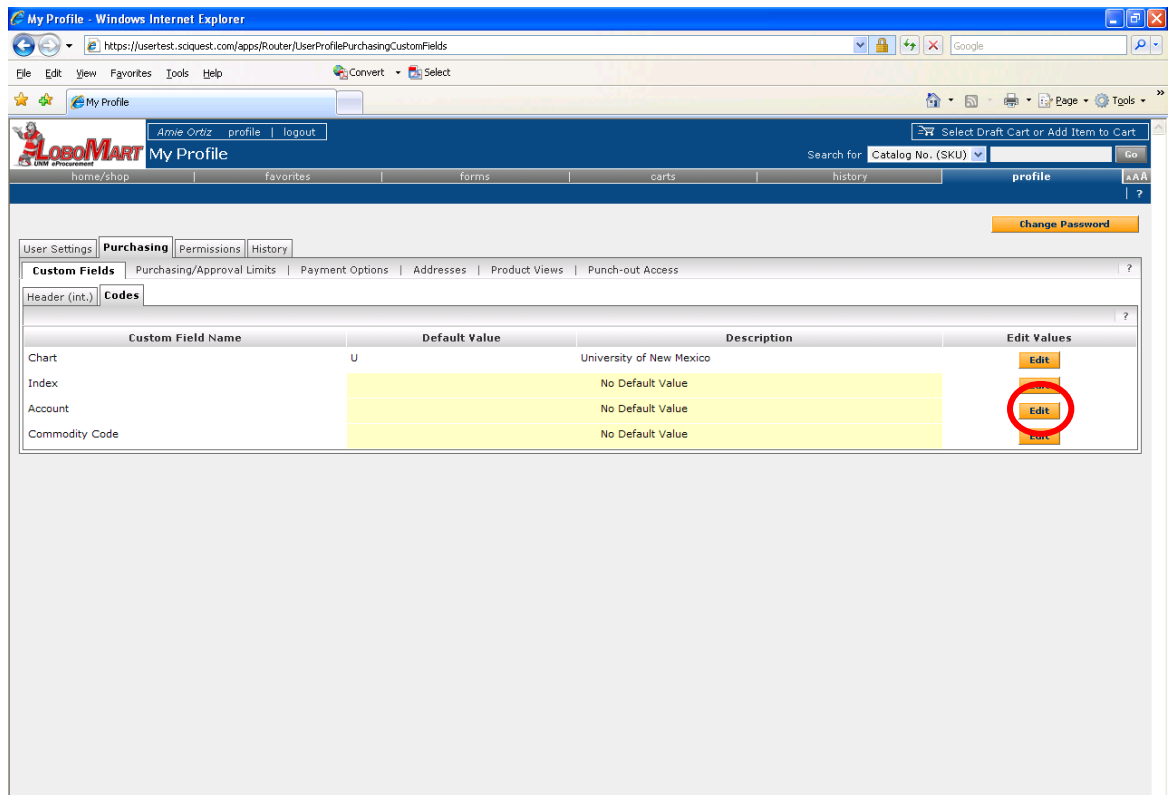
Search

No Results Found

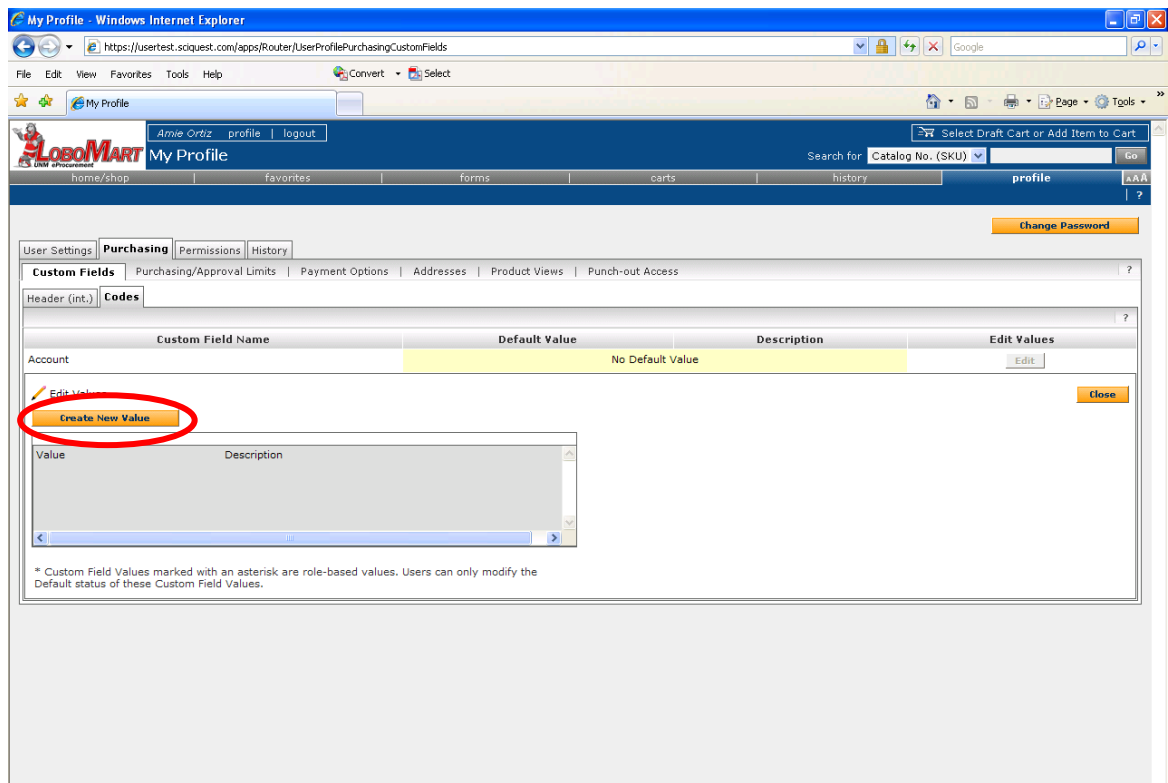
Close

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

21. Repeat this procedure to add Index Codes to your profile. By adding Index Codes to your profile, the values become available from a drop down list when requisitions are created. When finished, click on the **Close** button to return to the Codes list.



22. To add Account Codes, click on the Edit button to the right of the Account line.



23. Click on the Create New Value button.

My Profile - Windows Internet Explorer

https://usertest.sqquest.com/apps/Router/UserProfilePurchasingCustomFields

File Edit View Favorites Tools Help

My Profile

Amie Ortiz profile | logout

home/shop favorites forms carts history profile

Search for Catalog No. (SKU) Go

Change Password

User Settings **Purchasing** Permissions History

Custom Fields Purchasing/Approval Limits Payment Options Addresses Product Views Punch-out Access

Header (int.) **Codes**

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

Edit Values

Create New Value

Value Description

Search For Value

Field Name

Value 3100

Description

Results per Page 5

Search

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

24. Enter the Account Code in the **Value** text field **or** enter the Account description in the **Description** text field and click on the **Search** button. Leaving the **Value** and **Description** fields blank will return all available Account Codes.

My Profile - Windows Internet Explorer

https://usertest.sqquest.com/apps/Router/UserProfilePurchasingCustomFields

File Edit View Favorites Tools Help

My Profile

Amie Ortiz profile | logout

home/shop favorites forms carts history profile

Search for Catalog No. (SKU) Go

Change Password

User Settings **Purchasing** Permissions History

Custom Fields Purchasing/Approval Limits Payment Options Addresses Product Views Punch-out Access

Header (int.) **Codes**

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

Edit Values

Create New Value

Value Description

Results per Page 5

Values Found 1

Select	Value	Description
<input checked="" type="checkbox"/>	3100	OFF COPY General - 09052007

Add Values

Back to Search

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

25. Place a checkmark in the **Select** checkbox for the Account Code(s) you wish to add and click on the **Add Values** button.

My Profile - Windows Internet Explorer

https://usertest.sqquest.com/apps/Router/UserProfilePurchasingCustomFields

File Edit View Favorites Tools Help

My Profile

Amie Ortiz profile | logout

Search for Catalog No. (SKU) Go

home/shop favorites forms carts history profile

Change Password

User Settings Purchasing Permissions History

Custom Fields Purchasing/Approval Limits Payment Options Addresses Product Views Punch-out Access

Header (int.) Codes

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

Edit Values

Create New Value

Value Description

3100 Office Supplies General - 09052007

Search For Value

Field Name Account

Value 3100

Description

Results per Page 5

Search

No Results Found

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

Close

26. The Account Code(s) are added to your profile. Repeat this process to add more Account Codes. By adding Account Codes to your profile, the values become available from a drop down list when requisitions are created. When finished, click on the **Close** button.

My Profile - Windows Internet Explorer

https://usertest.sqquest.com/apps/Router/UserProfilePurchasingCustomFields

File Edit View Favorites Tools Help

My Profile

Amie Ortiz profile | logout

Search for Catalog No. (SKU) Go

home/shop favorites forms carts history profile

Change Password

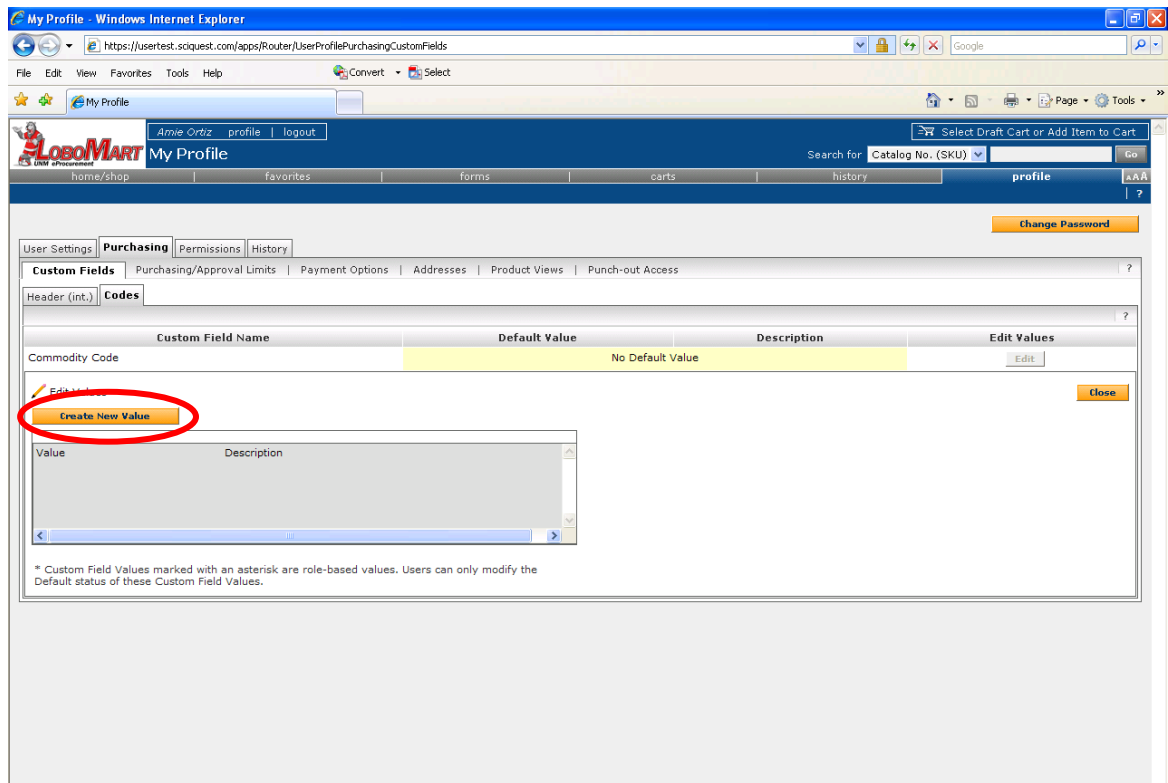
User Settings Purchasing Permissions History

Custom Fields Purchasing/Approval Limits Payment Options Addresses Product Views Punch-out Access

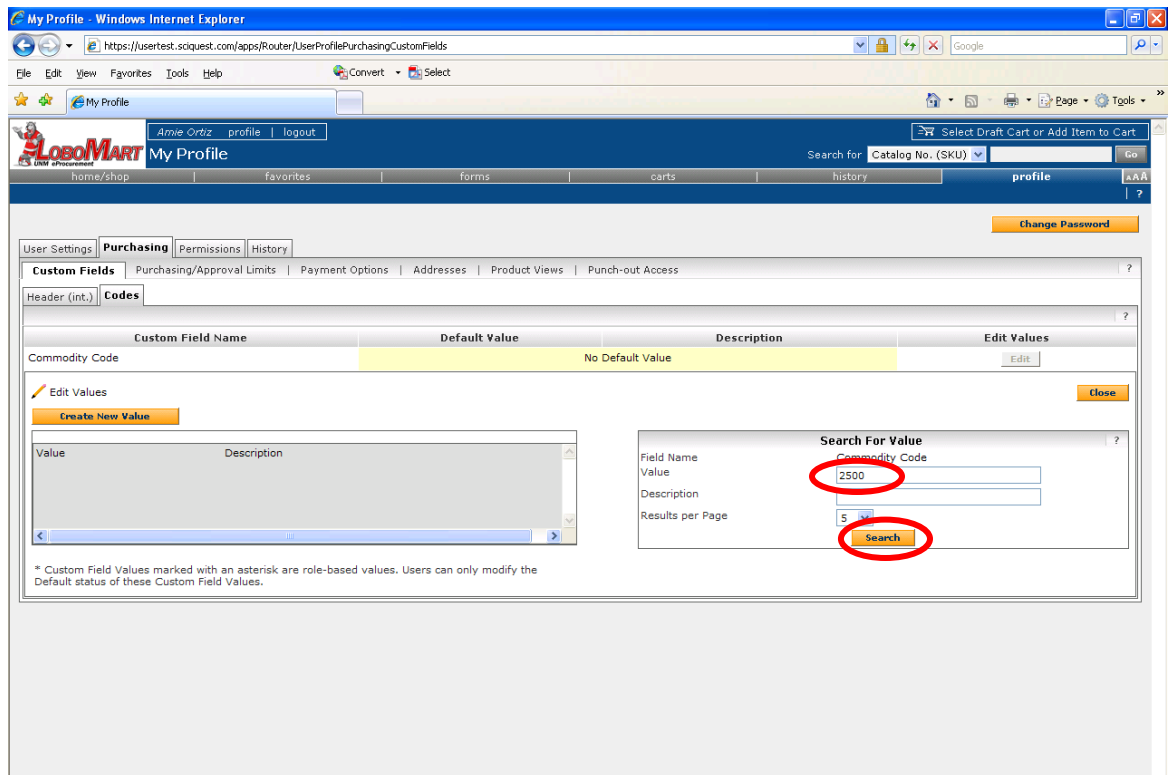
Header (int.) Codes

Custom Field Name	Default Value	Description	Edit Values
Chart	U	University of New Mexico	Edit
Index	No Default Value		Edit
Account	No Default Value		Edit
Commodity Code	No Default Value		Edit

27. To add Commodity Codes, click on the Edit button to the right of the Commodity Code line.



28. Click on the Create New Value button.



29. Enter the Commodity Code in the **Value** text field **or** enter the Commodity description in the **Description** text field and click on the **Search** button. Leaving the **Value** and **Description** fields blank will return all available Commodity Codes.

My Profile - Windows Internet Explorer

https://usertest.sqquest.com/apps/Router/UserProfilePurchasingCustomFields

File Edit View Favorites Tools Help

My Profile

Amie Ortiz profile | logout

home/shop favorites forms carts history profile

Search for Catalog No. (SKU) Go

Change Password

User Settings **Purchasing** Permissions History

Custom Fields Purchasing/Approval Limits Payment Options Addresses Product Views Punch-out Access

Header (int.) Codes

Custom Field Name	Default Value	Description	Edit Values
Commodity Code	No Default Value		Edit

Edit Values

Create New Value

Value	Description
2500	Supplies, Lab/Research
2500H	Supplies, Lab/Research - HAZARDOUS
2500R	Supplies, Lab/Research - RADIOACTIVE

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

Results per Page 5 Values Found 3 Page 1 of 1

Select	Value	Description
<input checked="" type="checkbox"/>	2500	Supplies, Lab/Research
<input checked="" type="checkbox"/>	2500H	Supplies, Lab/Research - HAZARDOUS
<input type="checkbox"/>	2500R	Supplies, Lab/Research - RADIOACTIVE

Add Values Back to Search

30. Place a checkmark in the **Select** checkbox for the Commodity Code(s) you wish to add and click on the **Add Values** button.

My Profile - Windows Internet Explorer

https://usertest.sqquest.com/apps/Router/UserProfilePurchasingCustomFields

File Edit View Favorites Tools Help

My Profile

Amie Ortiz profile | logout

home/shop favorites forms carts history profile

Search for Catalog No. (SKU) Go

Change Password

User Settings **Purchasing** Permissions History

Custom Fields Purchasing/Approval Limits Payment Options Addresses Product Views Punch-out Access

Header (int.) Codes

Custom Field Name	Default Value	Description	Edit Values
Commodity Code	No Default Value		Edit

Edit Values

Create New Value

Value	Description
2500	Supplies, Lab/Research
2500H	Supplies, Lab/Research - HAZARDOUS

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

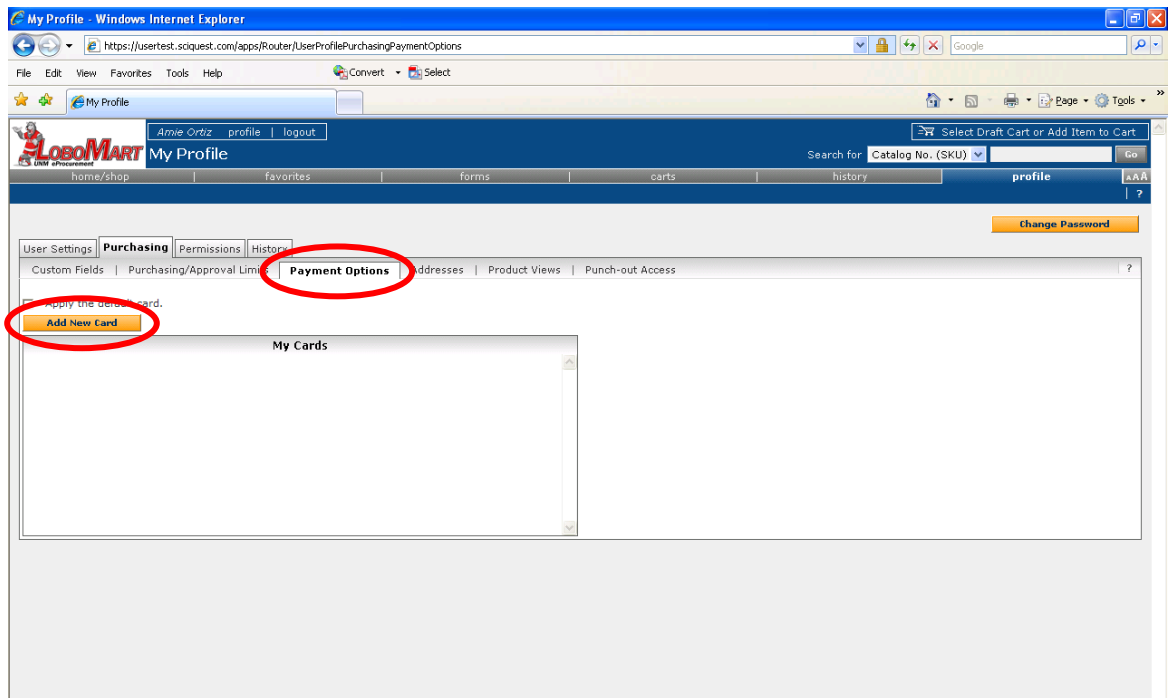
Results per Page 5 Values Found 1 Page 1 of 1

Select	Value	Description
<input type="checkbox"/>	2500R	Supplies, Lab/Research - RADIOACTIVE

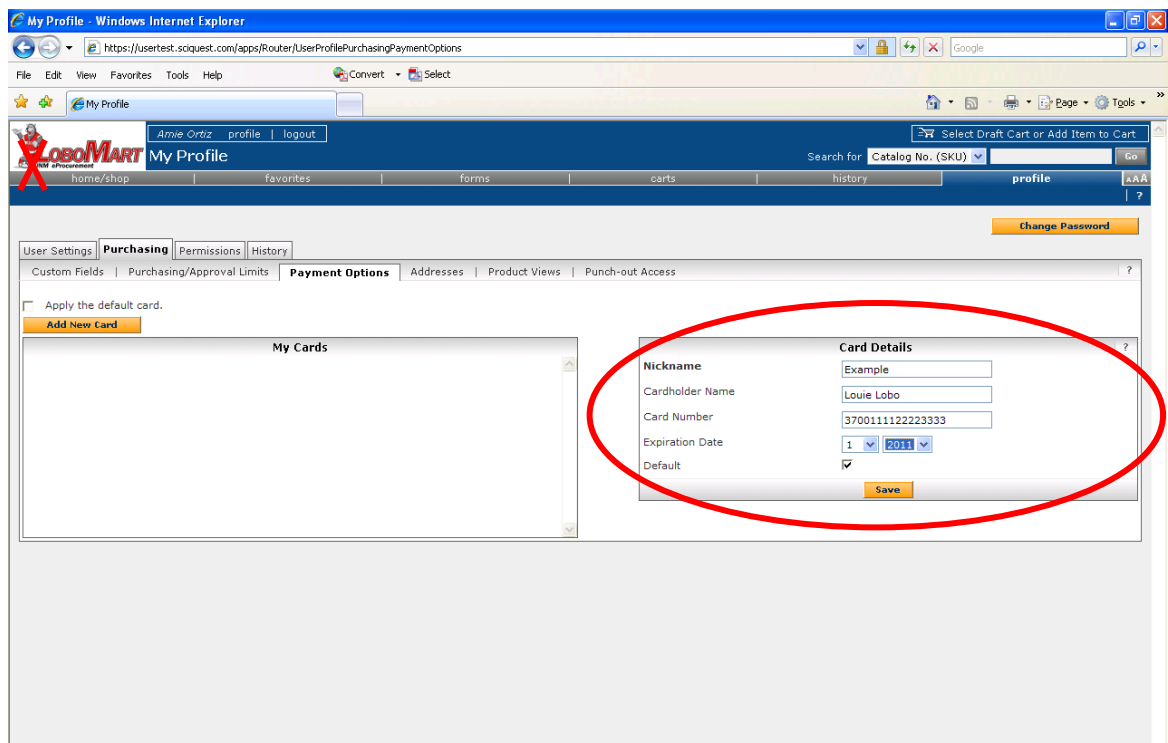
Add Values Back to Search

Close

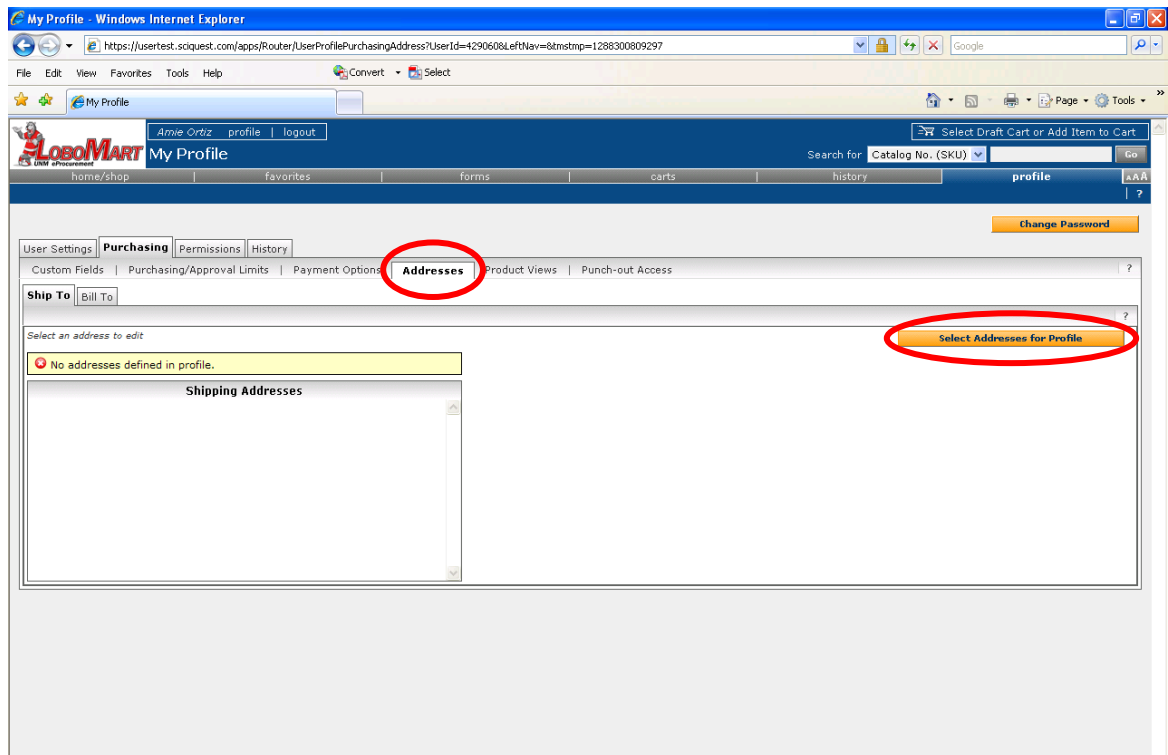
31. The Commodity Code(s) are added to your profile. Repeat this process to add more Commodity Codes. By adding Commodity Codes to your profile, the values become available from a drop down list when requisitions are created. When finished, click on the **Close** button.



32. Click on the **Payment Options** tab. If you have a Purchasing Card you may enter it here. Entering a P-Card will allow you to place P-Card orders through LoboMart with Catalog Vendors (Hosted and Punchout). To add a P-Card, click on the **Add New Card** button.

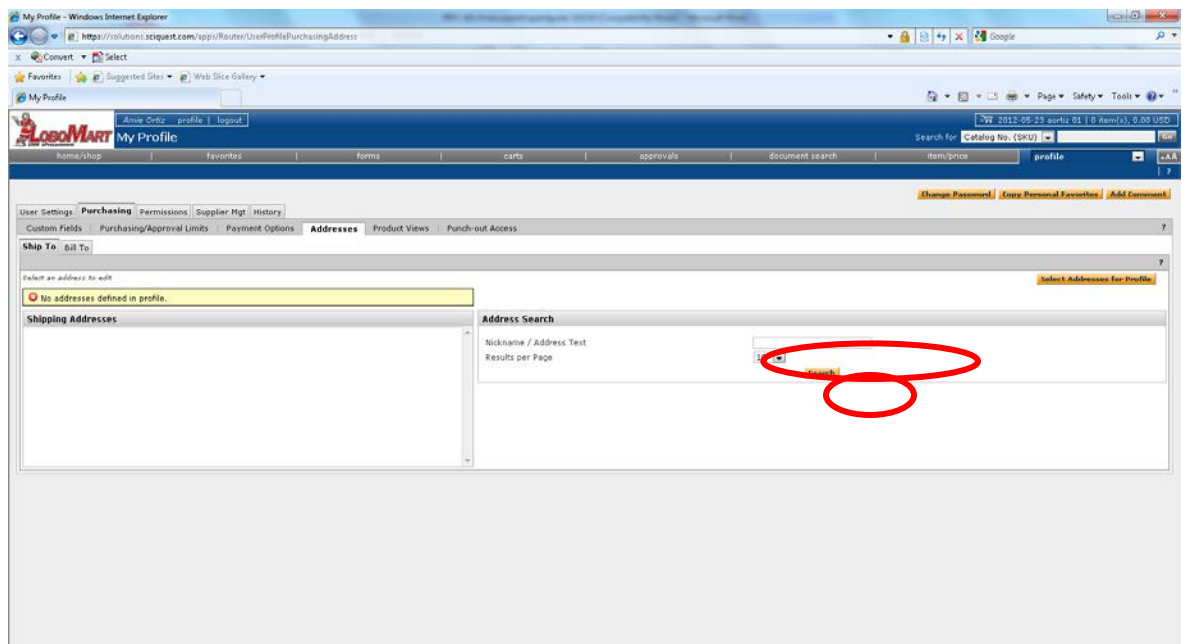


33. Enter your PCard information, place a checkmark in the **Default** checkbox, and click on the **Save** button. **NEVER** place a checkmark in the **Apply the default card** checkbox.



34. Click on the **Addresses** tab. The **Addresses** tab includes **Ship To** and **Bill To** addresses. Both **Ship To** and **Bill To** addresses are required.

35. To add a **Ship To** address click on the **Select Addresses for Profile** button.



36. Enter any part of your **Ship To** address in the **Nickname/Address Text** field and click on the **Search** button.

My Profile - Windows Internet Explorer

https://usertest.squest.com/apps/Router/UserProfilePurchasingAddress

File Edit View Favorites Tools Help

My Profile

Amie Ortiz profile | logout

home/shop favorites forms carts history profile

Search for Catalog No. (SKU) Go

Change Password

User Settings Purchasing Permissions History

Custom Fields Purchasing/Approval Limits Payment Options Addresses Product Views Punch-out Access

Ship To Bill To

Select an address to edit

No addresses defined in profile.

Shipping Addresses

Address Search

Nickname

Address Text purchasing

Results per Page 10

Search

Addresses Found: 2

Page 1 of 1

PUR001

ZZZZ11

Contact Name Department Administrator

Phone +1 (505) 277-5225

Email aortiz@unm.edu

PURCHASING DEPT

UNM Business Center, Ste 2600

Test Synch 6/16/08, 3:42p

Albuquerque, NM 87131

United States

Contact Name Department Administrator

Phone +1 (505) 277-5225

Email aortiz@unm.edu

PURCHASING & UNIV SVCS

Addr 2, Test synch 9/7/05

1 University of New Mexico

Oñate Hall

Albuquerque, NM 87131

United States

37. Click the radio button next to the **Ship To** address you wish to add. **Note:** If your Ship To address is not found, or if the information -needs to be modified, please email the Purchasing department at purch@unm.edu.

My Profile - Windows Internet Explorer

https://usertest.squest.com/apps/Router/UserProfilePurchasingAddress

File Edit View Favorites Tools Help

My Profile

Amie Ortiz profile | logout

home/shop favorites forms carts history profile

Search for Catalog No. (SKU) Go

Change Password

User Settings Purchasing Permissions History

Custom Fields Purchasing/Approval Limits Payment Options Addresses Product Views Punch-out Access

Ship To Bill To

Select an address to edit

No addresses defined in profile.

Shipping Addresses

Address Search

Nickname

Address Text purchasing

Results per Page 10

Search

Addresses Found: 2

Page 1 of 1

PUR001

ZZZZ11

Contact Name Department Administrator

Phone +1 (505) 277-5225

Email aortiz@unm.edu

PURCHASING DEPT

UNM Business Center, Ste 2600

Test Synch 6/16/08, 3:42p

Albuquerque, NM 87131

United States

Contact Name Department Administrator

Phone +1 (505) 277-5225

Email aortiz@unm.edu

PURCHASING & UNIV SVCS

Addr 2, Test synch 9/7/05

1 University of New Mexico

Oñate Hall

Albuquerque, NM 87131

United States

Edit Selected Address

Nickname PUR001

Default ☒

Current Default Address

ADDRESS

Contact Name Lucy Lobd

Phone +1 (505) 277-5225

Email aortiz@unm.edu

Address Line 1 PURCHASING DEPT

Address Line 2 UNM Business Center, Ste 2600

Address Line 3 Test Synch 6/16/08, 3:42p

City Albuquerque

State NM

Zip Code 87131

Country United States

Save

38. Enter Contact Name, Phone, and Email in the appropriate fields and click on the **Save** button. At least one Ship To address must be set up as a default address. To select a default address for all LoboMart requisitions, place a checkmark in the **Default** checkbox. Click the **Save** button.

The screenshot shows the 'My Profile' page in the LoboMart system. The 'Ship To' tab is selected, and a list of shipping addresses is displayed. The address 'PUR001' is highlighted with a red circle. To the right, the 'Edit Selected Address' form is visible, showing details for 'PUR001'.

Shipping Addresses	
PUR001	

Edit Selected Address	
Nickname	PUR001
Default	<input checked="" type="checkbox"/>
Current Default Address	PUR001
ADDRESS	
Contact Name	Lucy Lobo
Phone	+1 (505) 277-5225
Email	aortiz@unm.edu
Address Line 1	PURCHASING DEPT
Address Line 2	UNM Business Center, Ste 2600
Address Line 3	Test Synch 6/16/08, 3:42p
City	Albuquerque
State	NM
Zip Code	87131
Country	United States

39. The Ship To address has been added to your profile. Additional Ship To addresses are added using the same process, but without clicking the **Default** check box.

The screenshot shows the 'My Profile' page in the LoboMart system. The 'Bill To' tab is selected, and a message indicates 'No addresses defined in profile.' The 'Select Addresses for Profile' button is highlighted with a red circle.

Billing Addresses	
No addresses defined in profile.	

40. Click on the **Bill To** tab. A **Bill To** address must be assigned to your profile. Click on the **Select Addresses for Profile** button.

The screenshot shows the 'My Profile' page in a Windows Internet Explorer browser. The user is logged in as 'Amie Ortiz'. The 'Addresses' tab is selected, and the 'Bill To' address type is chosen. A message states 'No addresses defined in profile.' The 'Select Address Template' dropdown menu is highlighted with a red circle.

41. Select **Accounts Payable** from the **Select Address Template** drop down menu. ****Accounts Payable will be the Bill To address for all LoboMart requisitions.** Click on the **Save** button.

The screenshot shows the 'My Profile' page with the 'Addresses' tab selected. The 'Billing Addresses' section now contains one entry, 'Accounts Payable - Bill To', which is highlighted with a red circle. The 'Edit Selected Address' form is also visible, showing the address details for 'Accounts Payable - Bill To'.

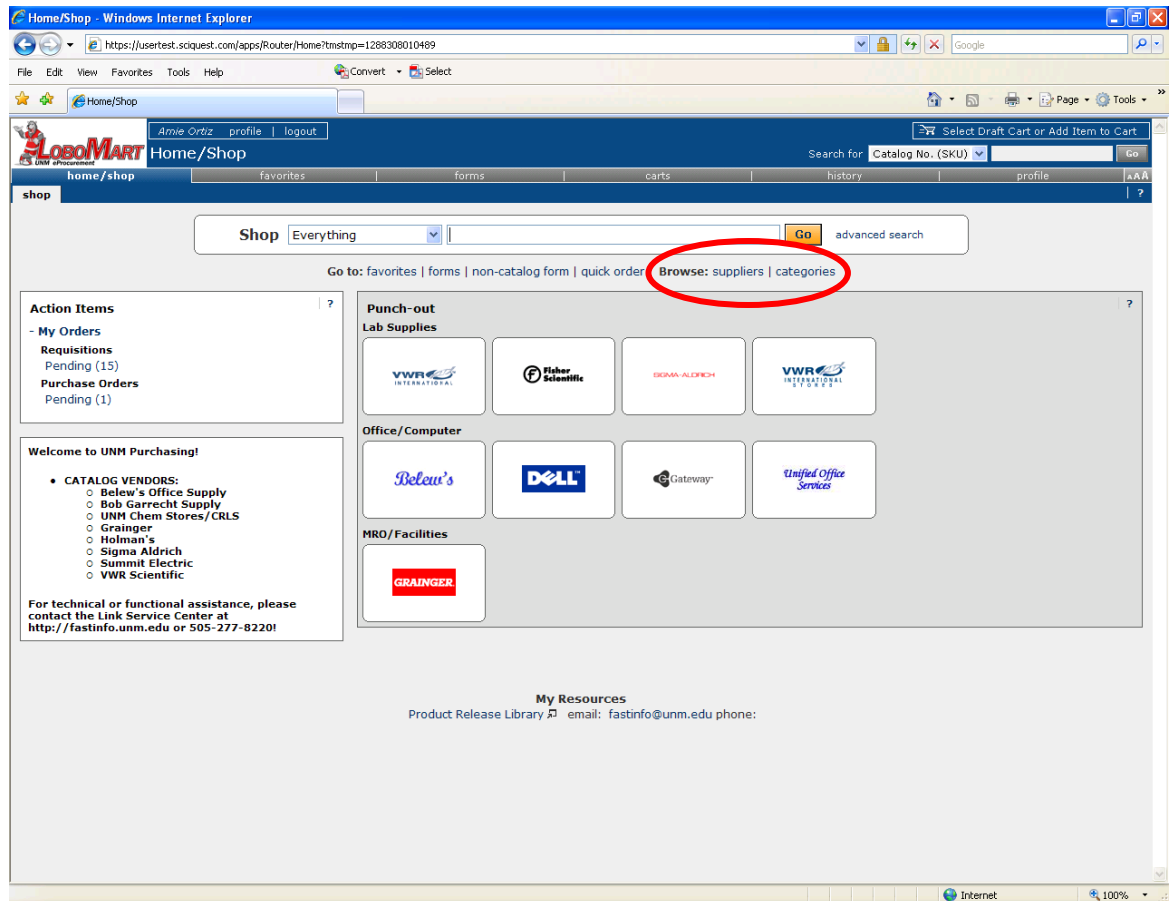
42. The **Bill To** address is added to your profile.

43. Your **Profile** is now complete.

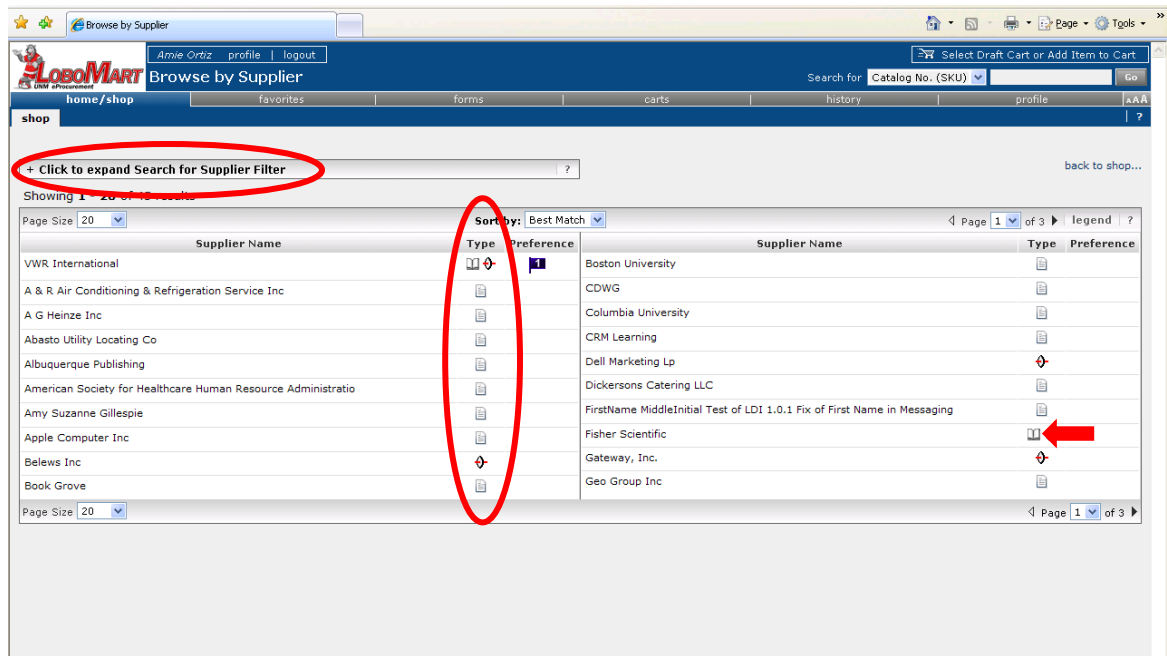
LoboMart – Hosted Catalog Vendor

Hosted Catalog Vendors have their catalog content hosted in the LoboMart application. Users can search and compare items from vendors who offer competitive University pricing.

Exercise 2 - Placing an order from a Hosted Catalog Vendor

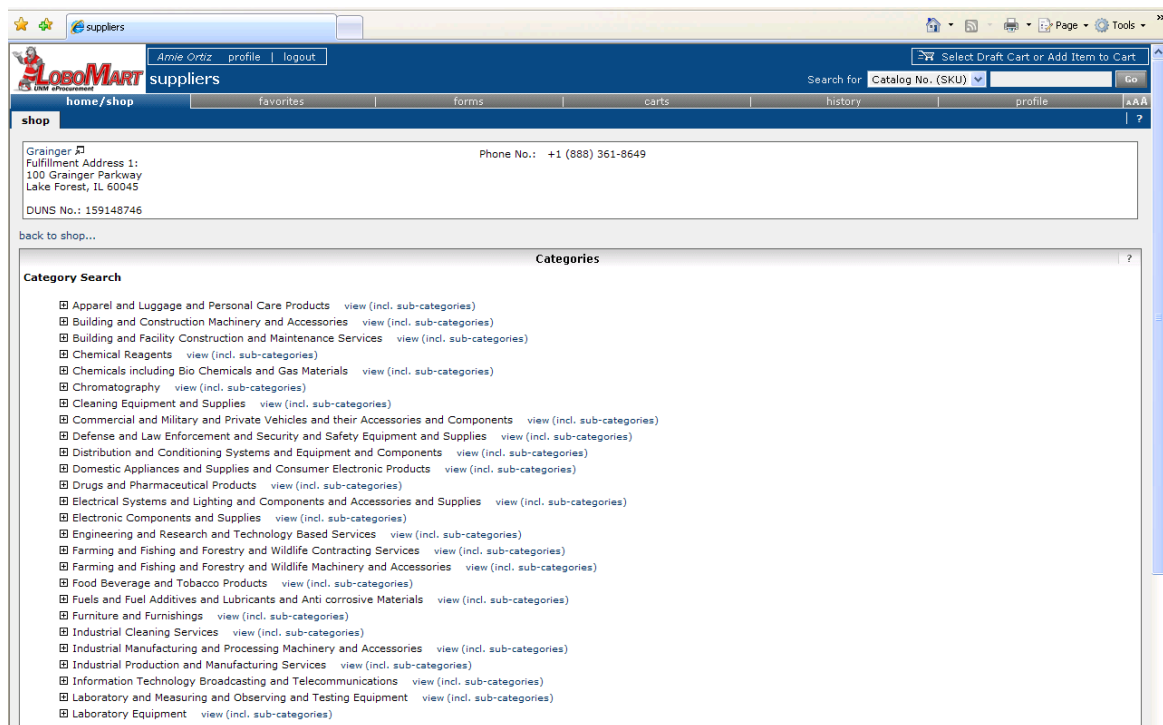


1. To place an order with a Catalog Vendor, choose **suppliers** or **categories** from the **Browse** section on the LoboMart home page.

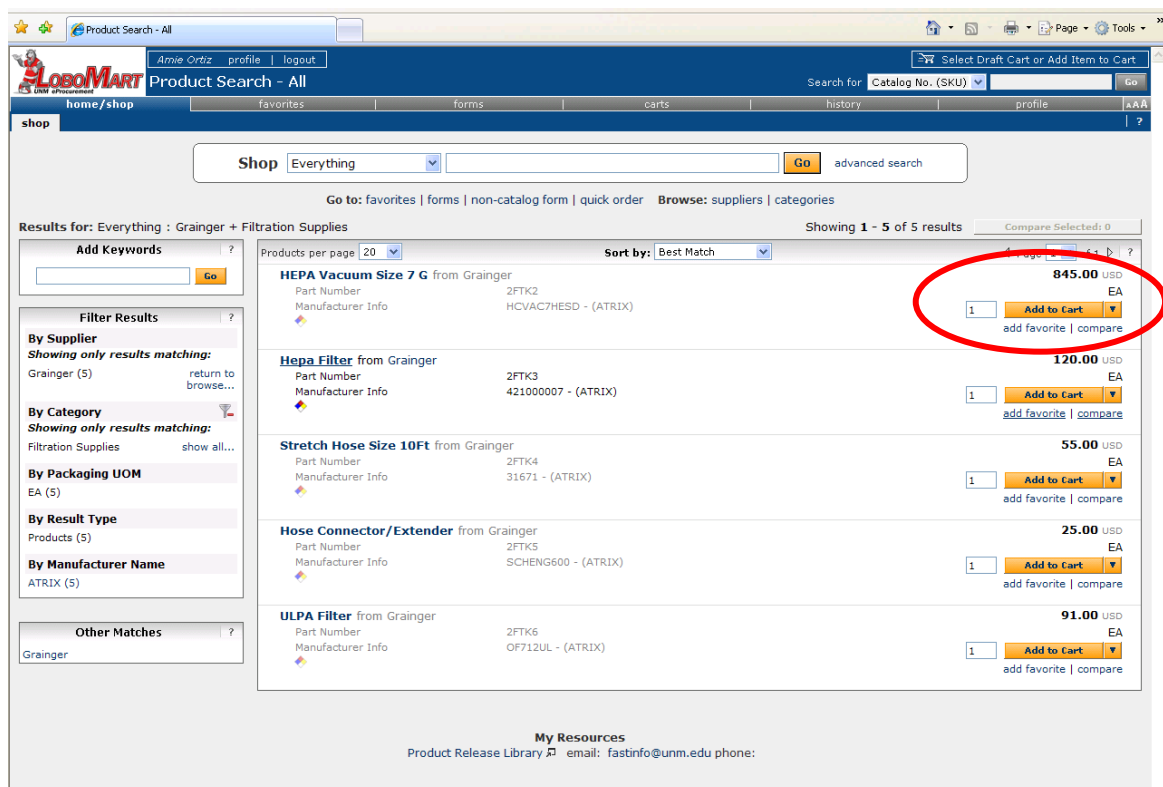


2. Choose **suppliers** to view a list of all Hosted Catalog vendors. If you would like to search for a specific vendor **Click to expand Search for Supplier Filter**, enter all or part of the supplier's name in the appropriate field and click on **Search**.

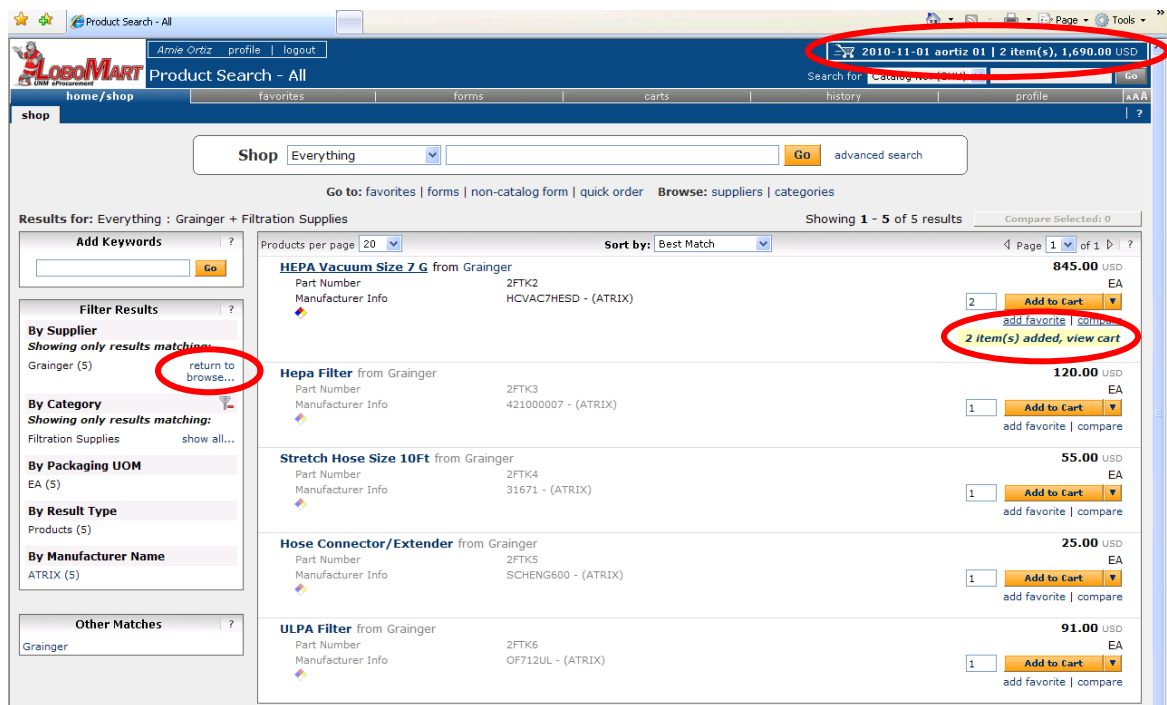
3. This is a sample of the results returned from an expanded search. Notice the 'Type' column. This column indicates whether a particular vendor is a Hosted Catalog Vendor, Non-Catalog Vendor, or Punchout Catalog Vendor. The symbol for a Hosted Catalog Vendor is noted with an arrow. Click on the hosted catalog vendor symbol located to the right of the desired hosted catalog vendor name.



4. The supplier's catalog appears, grouped by category. Click on the + and – to the left of each category to expand or collapse the category. Drill down until you find the specific type of item you want, and click on **view (incl. sub-categories)**.

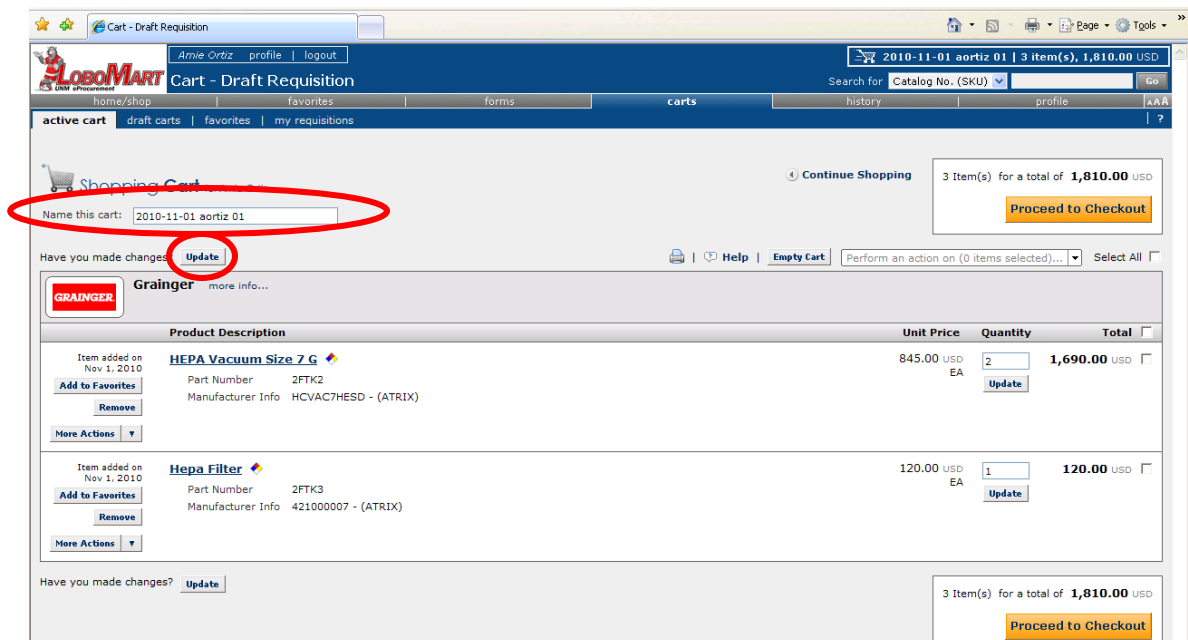


5. After selecting the type of item to purchase, the **Product Search Results** screen appears. Select the item(s) to purchase, change the quantity if necessary, and click on the **Add to Cart** button.



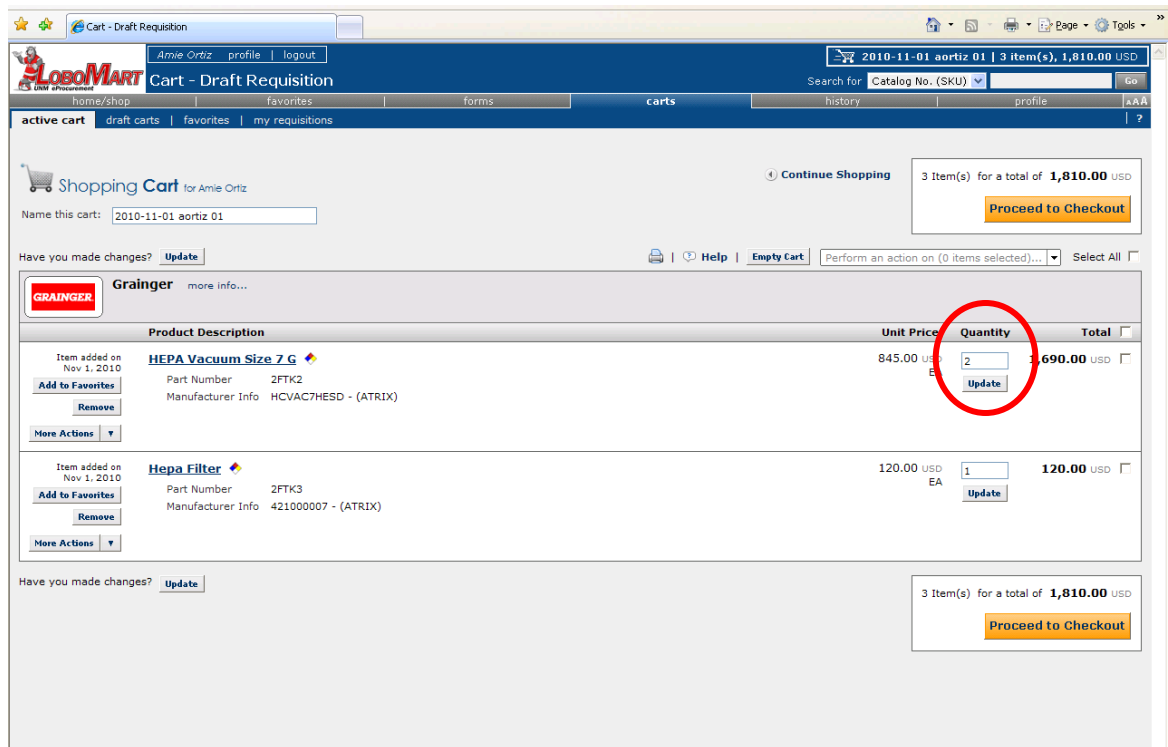
6. A message confirms the items are added to your cart.

7. Click on the **return to browse...** link to return to the hosted supplier catalog. Repeat this process until all items are added. When finished, click on your shopping cart.

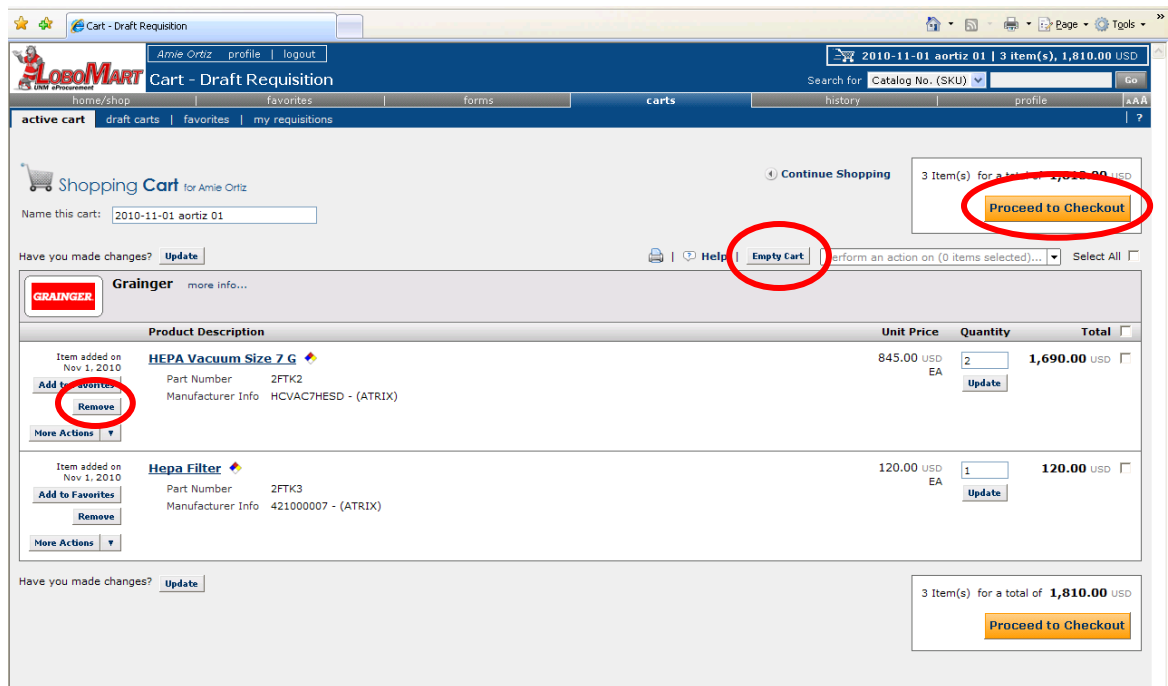


8. From your **Shopping Cart** you can change your Cart Name, Product Location, update quantities, add items to your favorites, or remove items from your cart.

9. To change the **Cart Name**, enter a new cart name in the **Cart Name** field and click on the **Update** button.




10. To update quantities, change the quantity in the **Quantity** field and click on the **Update** button.



11. To remove an item from your cart, click on the **Remove** button for that item. To empty your cart completely, click on the **Empty Cart** button.

12. When finished, click on the **Proceed to Checkout** button.

13. The checkout steps will appear on the top of the screen. If a step has a  you may go to that step to make changes, but no entry is required. Since most users will have a default **Product Location**, **Shipping Address** and **Billing Address**, those steps may automatically be completed. You will be taken directly to the first checkout step that requires your attention. In this example, that is **Accounting Codes**.

14. To add the **Index** and **Account** codes, click **edit** button in the **Accounting Codes** section at the top of the screen.

15. Enter the **Index** and **Account** codes in the fields provided. You can also click on **Select from profile values...** to view the list of codes added to your profile or **Select from all values...** to search the entire list of codes. Once you have entered the **Index** and **Account** codes, click on the **Save** button.

active cart | draft carts | favorites | my requisitions

General Shipping Billing Product Location Note to Purchasing/Supplier Accounting Codes Commodity Code Final Review Place Order

You have completed the required information in this step. At this point, you can do the following:
Proceed to the next step: Commodity Code. Go straight to the end: Final Review.

Requisition | PR Approvals | PO Preview | History

Summary | Shipping | Billing | Accounting Codes | Commodity Code | Supplier Info

Accounting Codes

These values apply to all lines unless specified by line item

Chart	Index	Account
U	944000	3150
University of New Mexico	113425-Purchasing Operations 092805	Lab Supplies Gen

Supplier / Line Item Details

For selected line items: Add To Favorites

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 HEPA Vacuum Size 7 G	2FTK2	EA	845.00	2 EA	1,690.00 USD
Accounting Codes (same as header)					
edit					
2 Hepa Filter	2FTK3	EA	120.00	1 EA	120.00 USD
Accounting Codes (same as header)					
edit					
Supplier subtotal					1,810.00 USD
Subtotal					1,810.00
Total					1,810.00 USD

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

See configuration for this requisition

16. If there is only one Index and Account code for the order, skip to step 18. To add a different Index/Account code to one or more line items, click on the **edit** button next to the line item.

Requisition | PR Approvals | PO Preview | History

Summary | Shipping | Billing | Accounting Codes | Commodity Code | Supplier Info

Accounting Codes

These values apply to all lines unless specified by line item

Chart	Index	Account
U	944000	3150
University of New Mexico	113425-Purchasing Operations 092805	Lab Supplies Gen

Supplier / Line Item Details

For selected line items: Add To Favorites

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 HEPA Vacuum Size 7 G	2FTK2	EA	845.00	2 EA	1,690.00 USD
Accounting Codes (same as header)					
edit					
2 Hepa Filter	2FTK3	EA	120.00	1 EA	120.00 USD
Accounting Codes (same as header)					
edit					
Supplier subtotal					1,810.00 USD
Subtotal					1,810.00
Total					1,810.00 USD

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

See configuration for this requisition

Accounting Codes

Chart Index Account Amount of Price add split

U	944002	3150	1000.00	remove
Select from profile values...	Select from profile values...	Select from profile values...		
Select from all values...	Select from all values...	Select from all values...		
U	944000	3150	690.00	remove
Select from profile values...	Select from profile values...	Select from profile values...		
Select from all values...	Select from all values...	Select from all values...		

Line subtotal: 1,690.00 USD Split Total: 0.00 USD add split

recalculate / validate values

Save Cancel

17. You can now change the **Index** and/or **Account** code for only this line item. Then, click on the **Save** button. Repeat for any other line items you want to assign alternate codes to. If you would like to split one line item into multiple **Index/Account** codes, click on the **add split** link. Each time you click on the link another line will be added (transactions may not be split more than 10 times). Choose **Amount of Price** as the method of split from the dropdown box (ignore **% of Price**, **% of Quantity** and **Amount of Quantity**). Enter the **Indices**, **Account** codes and dollar amounts, then click on the **Save** button. Repeat for any other line items you want to split.

Accounting Codes - Draft Requisition

Amie Ortiz profile | logout

2010-11-01 aortiz 01 | 3 item(s), 1,810.00 USD

Search for Catalog No. (SKU) Go

home/shop favorites forms carts approvals history profile more >> AAA

active cart draft carts favorites my requisitions

General Shipping Billing Product Location Note to Purchasing/Supplier Accounting Codes **Commodity Code** Final Review Place Order

Return to shopping cart Continue Shopping

You have completed the required information in this step. At this point, you can do the following:
Proceed to the next step: Commodity Code. Go straight to the end: Final Review.

Requisition PR Approvals PO Preview History

Summary Shipping Billing Accounting Codes Commodity Code Supplier Info

Accounting Codes

These values apply to all lines unless specified by line item

Chart	Index	Account	edit
U	944000	31S0	
University of New Mexico	113425-Purchasing Operations 092805	Lab Supplies Gen	

copy to other lines

Supplier / Line Item Details

For selected line items Add To Favorites Go

Grainger more info...

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 HEPA Vacuum Size 7 G	2FTK2	EA	845.00	2 EA	1,690.00 USD

Accounting Codes

values have been overridden for this line

Chart	Index	Account	Amount of Price	edit
U	944002	31S0	1,000.00 USD	
University of New Mexico	123007-NAEB CONFERENCE	Lab Supplies Gen		
U	944000	31S0	690.00 USD	
University of New Mexico	113425-Purchasing Operations 092805	Lab Supplies Gen		

copy to other lines

18. Once the required information has been completed for this step you will be directed to the next step. In this example, the next section to be completed is **Commodity Code**. Click on the **Commodity Code** step at the top of the screen.

Commodity Code - Draft Requisition

Amie Ortiz profile | logout

2010-11-01 aortiz 01 | 3 item(s), 1,810.00 USD

Search for Catalog No. (SKU) Go

home/shop favorites forms carts approvals history profile more >> AAA

active cart draft carts favorites my requisitions

General Shipping Billing Product Location Note to Purchasing/Supplier Accounting Codes **Commodity Code** Final Review Place Order

Return to shopping cart Continue Shopping

Almost ready to go! The list below needs to be addressed before the request can be submitted.

- Required field: Commodity Code

Requisition PR Approvals PO Preview History

Summary Shipping Billing Accounting Codes Commodity Code Supplier Info

Commodity Code

These values apply to all lines unless specified by line item

Commodity Code

Required field

edit

Supplier / Line Item Details

For selected line items Add To Favorites Go

Grainger more info...

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 HEPA Vacuum Size 7 G	2FTK2	EA	845.00	2 EA	1,690.00 USD
Commodity Code (same as header)					
2 Hepa Filter	2FTK3	EA	120.00	1 EA	120.00 USD
Commodity Code (same as header)					

Supplier subtotal 1,810.00 USD

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	1,810.00
Total	1,810.00 USD

See configuration for this requisition

19. To add the **Commodity Code**, click on the **edit** button in the **Commodity Code** section.

Commodity Code - Draft Requisition

Amie Ortiz profile | logout

2010-11-01 aortiz 01 | 3 item(s), 1,810.00 USD

Search for Catalog No. (SKU) Go

home/shop favorites forms carts approvals history profile more >> AAA

active cart draft carts favorites my requisitions

General Shipping Billing Product Location Note to Purchasing/Supplier Accounting Codes Commodity Code Final Review Place Order

Return to shopping cart Continue Shopping

Almost ready to go! The list below needs to be addressed before the request can be submitted.

- Required field: Commodity Code

Requisition PR Approvals PO Preview History

Summary Shipping Billing Accounting Codes Commodity Code Supplier Info

Hide value descriptions

Commodity Code

These values apply to all lines unless specified by line item

Commodity Code edit

Required field

Commodity Code

2500

Select from profile values...

Select from all values...

Required field

Save Cancel

Granger more info...

Product Description

Item	Product Description	Catalog No.	Size / Packaging	Unit Price	Quantity	Ext. Price
1	HEPA Vacuum Size 7 G	2FTK2	EA	845.00	2 EA	1,690.00 USD
2	Hepa Filter	2FTK3	EA	120.00	1 EA	120.00 USD

Supplier subtotal 1,810.00 USD

Subtotal 1,810.00 USD

20. Click on **Select from profile values...** to access the codes you entered into your profile, or click on **Select from all values...** to search the full **Commodity Code** list. When you have selected your **Commodity Code**, click on the **Save** button.

Commodity Code - Draft Requisition

Amie Ortiz profile | logout

2010-11-01 aortiz 01 | 3 item(s), 1,810.00 USD

Search for Catalog No. (SKU) Go

home/shop favorites forms carts approvals history profile more >> AAA

active cart draft carts favorites my requisitions

General Shipping Billing Product Location Note to Purchasing/Supplier Accounting Codes Commodity Code Final Review Place Order

Return to shopping cart Continue Shopping

You have completed the required information in this step. At this point, you can do the following:

Proceed to the next step: Final Review.

Requisition PR Approvals PO Preview History

Summary Shipping Billing Accounting Codes Commodity Code Supplier Info

Hide value descriptions

Commodity Code

These values apply to all lines unless specified by line item

Commodity Code edit

2500

Supplies, Lab/Research

Supplier / Line Item Details

For selected line items Add To Favorites Go

Granger more info...

Product Description

Item	Product Description	Catalog No.	Size / Packaging	Unit Price	Quantity	Ext. Price
1	HEPA Vacuum Size 7 G	2FTK2	EA	845.00	2 EA	1,690.00 USD
2	Hepa Filter	2FTK3	EA	120.00	1 EA	120.00 USD

Supplier subtotal 1,810.00 USD

Subtotal 1,810.00 USD

Total 1,810.00 USD

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

See configuration for this requisition

21. You may also go back to a previous step at any point to change information. For example, if you would like to change your Shipping Address, you can click on the **Shipping** step.

Shipping - Draft Requisition

Amie Ortiz profile | logout

2010-11-01 aortiz 01 | 3 item(s), 1,810.00 USD

home/shop | favorites | forms | carts | approvals | history | profile | more >>

active cart | draft carts | favorites | my requisitions

General | Shipping | Billing | Product Location | Note to Purchasing/Supplier | Accounting Codes | Commodity Code | Final Review | Place Order

You have completed the required information in this step. At this point, you can do the following:
Proceed to the next step: Billing. Go straight to the end: Final Review.

Requisition | PR Approvals | PO Preview | History

Summary | Shipping | Billing | Accounting Codes | Commodity Code | Supplier Info

Shipping

These values apply to all lines unless specified by line item

Ship To
Shipping address
Contact Name Lucy Lobo
Phone +1 (505) 277-5225
Email aortiz@unm.edu
PURCHASING DEPT
UNM Business Center, Ste 2600
Test Synch 6/16/08, 3:42p
Albuquerque, NM 87131
United States

Delivery Options
Ship Via Best Carrier-Best Way
Req Delivery no value

Supplier / Line Item Details

For selected line items Add To Favorites Go

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 HEPA Vacuum Size 7 G	2FTK2	EA	845.00	2 EA	1,690.00 USD
Ship To (same as header)					
Delivery Options (same as header)					
2 Hepa Filter	2FTK3	EA	120.00	1 EA	120.00 USD
Ship To (same as header)					

22. To change the Ship To address, click on the **edit** button in the **Shipping** section.

Shipping - Draft Requisition

Amie Ortiz profile | logout

2010-11-01 aortiz 01 | 3 item(s), 1,810.00 USD

home/shop | favorites | forms | carts | approvals | history | profile | more >>

active cart | draft carts | favorites | my requisitions

General | Shipping | Billing | Product Location | Note to Purchasing/Supplier | Accounting Codes | Commodity Code | Final Review | Place Order

You have completed the required information in this step. At this point, you can do the following:
Proceed to the next step: Billing. Go straight to the end: Final Review.

Requisition | PR Approvals | PO Preview | History

Summary | Shipping | Billing | Accounting Codes | Commodity Code | Supplier Info

Shipping

These values apply to all lines unless specified by line item

Ship To
Shipping address
Contact Name
Phone
Email
Address Line 1
Address Line 2
Address Line 3
Address Line 4
Address Line 5
City
State
Zip Code
Country

On save
☐ Add to profile as
ADS01

Save Cancel

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 HEPA Vacuum Size 7 G	2FTK2	EA	845.00	2 EA	1,690.00 USD
Ship To (same as header)					
Delivery Options (same as header)					

23. Select the address from the drop down list of the Ship To addresses set up within your personal profile or click on "from org addresses" to choose from all Ship To addresses. Then, click on the **Save** button.

Shipping - Draft Requisition

Amie Ortiz profile | logout

2010-11-01 aortiz 01 | 3 item(s), 1,810.00 USD

home/shop | favorites | forms | **carts** | approvals | history | profile | more >>

active cart | draft carts | favorites | my requisitions

General | Shipping | Billing | Product Location | **Note to Purchasing/Supplier** | Accounting Codes | Commodity Code | Final Review | Place Order

You have completed the required information in this step. At this point, you can do the following:
Proceed to the next step: Billing. Go straight to the end: Final Review.

Requisition | PR Approvals | PO Preview | History

Summary | **Shipping** | Billing | Accounting Codes | Commodity Code | Supplier Info

Shipping

These values apply to all lines unless specified by line item

Ship To
Shipping address
Contact Name Department
Administrator
Phone +1 (505) 277-5225
Email aortiz@unm.edu
ASST DEAN STUDENT
AFRR&ADM-SOM
MSC08 4690, BMSB Rm 106
918 Camino de Salud
BMSB
1st
Albuquerque, NM 87131
United States

Delivery Options
Ship Via Best Carrier-Best Way
Req Delivery no value

Supplier / Line Item Details

For selected line items Add To Favorites Go

Grainger more info...

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 HEPA Vacuum Size 7 G	2FTK2	EA	845.00	2 EA	1,690.00 USD

Ship To (same as header)

Delivery Options (same as header)

24. If you need to enter comments for Purchasing or the Vendor, click on the **Note to Purchasing/Supplier** step.

Note to Purchasing/Supplier - Draft Requisition

Amie Ortiz profile | logout

2010-11-01 aortiz 01 | 3 item(s), 1,810.00 USD

home/shop | favorites | forms | carts | approvals | history | profile | more >>

active cart | draft carts | favorites | my requisitions

General | Shipping | Billing | Product Location | **Note to Purchasing/Supplier** | Accounting Codes | Commodity Code | Final Review | Place Order

You have completed the required information in this step. At this point, you can do the following:
Proceed to the next step: Accounting Codes. Go straight to the end: Final Review.

Requisition | PR Approvals | PO Preview | History

Summary | Shipping | Billing | **Accounting Codes** | Commodity Code | Supplier Info

Note to Purchasing/Supplier

These values apply to all lines unless specified by line item

Supplier / Purchasing Dept. Instructions no note

Supplier / Line Item Details

For selected line items Add To Favorites Go

Grainger more info...

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 HEPA Vacuum Size 7 G	2FTK2	EA	845.00	2 EA	1,690.00 USD
2 Hepa Filter	2FTK3	EA	120.00	1 EA	120.00 USD

Supplier subtotal 1,810.00 USD

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal 1,810.00
Total 1,810.00 USD

See configuration for this requisition

25. Click on the **edit** button in the **Note to Purchasing/Supplier** section.

Note to Purchasing/Supplier - Draft Requisition

Amie Ortiz profile | logout

2010-11-01 aortiz 01 | 3 item(s), 1,810.00 USD

home/shop | favorites | forms | carts | approvals | history | profile | more >>

active cart | draft carts | favorites | my requisitions

General | Shipping | Billing | Product Location | Note to Purchasing/Supplier | Accounting Codes | Commodity Code | Final Review | Place Order

You have completed the required information in this step. At this point, you can do the following:
Proceed to the next step: Accounting Codes. Go straight to the end: Final Review.

Requisition | PR Approvals | PO Preview | History

Summary | Shipping | Billing | Accounting Codes | Commodity Code | Supplier Info

Note to Purchasing/Supplier

These values apply to all lines unless specified by line item

Supplier / Purchasing Dept. Instructions

Quote #12345.

expand | clear

Save | Cancel

Grainger

Product Description

Line	Product Description	Quantity	Unit Price	Ext. Price
1	HEPA Vacuum Size 7 G	2 EA	845.00	1,690.00 USD
2	Hepa Filter	1 EA	120.00	120.00 USD

Supplier subtotal: 1,810.00 USD

Subtotal: 1,810.00

Total: 1,810.00 USD

26. Enter the note in the text field provided and click on the **Save** button.

Note to Purchasing/Supplier - Draft Requisition

Amie Ortiz profile | logout

2010-11-01 aortiz 01 | 3 item(s), 1,810.00 USD

home/shop | favorites | forms | carts | approvals | history | profile | more >>

active cart | draft carts | favorites | my requisitions

General | Shipping | Billing | Product Location | Note to Purchasing/Supplier | Accounting Codes | Commodity Code | Final Review | Place Order

You have completed the required information in this step. At this point, you can do the following:
Proceed to the next step: Accounting Codes. Go straight to the end: Final Review.

Requisition | PR Approvals | PO Preview | History

Summary | Shipping | Billing | Accounting Codes | Commodity Code | Supplier Info

Note to Purchasing/Supplier

These values apply to all lines unless specified by line item

Supplier / Purchasing Dept. Instructions

Quote #12345.

Supplier / Line Item Details

For selected line items | Add To Favorites

Grainger

Product Description

Line	Product Description	Quantity	Unit Price	Ext. Price
1	HEPA Vacuum Size 7 G	2 EA	845.00	1,690.00 USD
2	Hepa Filter	1 EA	120.00	120.00 USD

Supplier subtotal: 1,810.00 USD

Subtotal: 1,810.00

Total: 1,810.00 USD

27. After adding the note, click on the Final Review step to review previously entered information and add your business purpose.

Summary - Draft Requisition

Amie Ortiz profile | logout

2010-11-01 aortiz 01 | 3 item(s), 1,810.00 USD

home/shop | favorites | forms | carts | approvals | history | profile | more >>

active cart | draft carts | favorites | my requisitions

General | Shipping | Billing | Product Location | Note to Purchasing/Supplier | Accounting Codes | Commodity Code | Final Review | Place Order

Return to shopping cart | Continue Shopping

Almost ready to go! The list below needs to be addressed before the request can be submitted.

- Required field: Business Purpose/Detailed Item Description (Line 1)
- Required field: Business Purpose/Detailed Item Description (Line 2)

Requisition | PR Approvals | PO Preview | History

Summary | Shipping | Billing | Accounting Codes | Commodity Code | Supplier Info

Hide header

General Cart Name: 2010-11-01 aortiz 01 Prepared by: Amie Ortiz	Shipping Ship To: Contact Name: Department Administrator Phone: +1 (505) 277-5225 Email: aortiz@unm.edu ASST DEAN STUDENT AFFR&ADM-SOM MSC08 4690, BMSB Rm 106 918 Camino de Salud BMSB 1st Albuquerque, NM 87131 United States Delivery Options: Ship Via: Best Carrier-Best Way Req Delivery: no value	Billing Bill To: Attention: Doug Nelson Email: aortiz@unm.edu Phone: 505-277-2014 Accounts Payable MSC06 3540, Onate Hall Rm 222 Onate Hall 2nd Albuquerque, NM 87131 United States
------------------------------------------------------------------------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

View/edit by line item...

Product Location Product Location: Purchasing Department Perovich Business Ctr, ste 2600	Note to Purchasing/Supplier Supplier / Purchasing Dept. Instructions: Quote #12345.
-------------------------------------------------------------------------------------------------------	-----------------------------------------------------------------------------------------------

Accounting Codes Chart: U Index: 944000 Account: 113425-Purchasing Operations 092805 Lab Supplies Gen	Commodity Code Commodity Code: 2500 Supplies, Lab/Research
--------------------------------------------------------------------------------------------------------------------------	-------------------------------------------------------------------------

View/edit by line item...

Supplier / Line Item Details

28. A Business Purpose and item detail for each requisition is required. Scroll down to the Line Item Details section.

View/edit by line item...

Product Location Product Location: Purchasing Department Perovich Business Ctr, ste 2600	Note to Purchasing/Supplier Supplier / Purchasing Dept. Instructions: Quote #12345.
-------------------------------------------------------------------------------------------------------	-----------------------------------------------------------------------------------------------

Accounting Codes Chart: U Index: 944000 Account: 113425-Purchasing Operations 092805 Lab Supplies Gen	Commodity Code Commodity Code: 2500 Supplies, Lab/Research
--------------------------------------------------------------------------------------------------------------------------	-------------------------------------------------------------------------

View/edit by line item...

Supplier / Line Item Details

Hide line details

For selected line items: Add To Favorites | Go

Grainger more info...

PO Number: To Be Assigned

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1 HEPA Vacuum Size 7 G	2FTK2	EA	845.00	2 EA	1,690.00 USD	edit
Accounting Codes values have been overridden for this line. view/edit						
Manufacturer Name: ATRIX Manufacturer Part Number: HCVAC7HESD More Information URL: http://www.grainger.com/Grainger/pr... UNSPSC: 41-10-49-19			Business Purpose/Detailed Item Description: Required field			
2 Hepa Filter	2FTK3	EA	120.00	1 EA	120.00 USD	edit
Manufacturer Name: ATRIX Manufacturer Part Number: 421000007 More Information URL: http://www.grainger.com/Grainger/pr... UNSPSC: 41-10-49-19			Business Purpose/Detailed Item Description: Required field			
Supplier subtotal					1,810.00 USD	
Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.					Subtotal	1,810.00
					Total	1,810.00 USD

See configuration for this requisition view carts

29. Click on the **edit** button for a cart line item in the **Line Item Details** section.

Supplier / Line Item Details

For selected line items: Add To Favorites

PO Number: To Be Assigned

View/edit by line item...

Hide line details

Grainger more info...

Product Description: HEPA Vacuum Size 7 G more info...

Catalog No: 2FTK2

Size / Packaging: EA

Unit Price: 845.00

Quantity: EA

Ext. Price: 1,690.00 USD

Business Purpose/Detailed Item Description: Sample business purpose. expand | clear

Required field

Save Cancel

Manufacturer Name: ATRIX

Manufacturer Part Number: 421000007

More Information URL: http://www.grainger.com/Grainger/pr... more info...

UNSPSC: 41-10-49-19

Supplier subtotal: 1,810.00 USD

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal: 1,810.00

Total: 1,810.00 USD

30. Enter the business purpose in the **Business Purpose/Detailed Item Description** field in the **Edit Line** box that appears and click on the **Save** button.

Summary - Draft Requisition

Product Location: Purchasing Department, Perovich Business Ctr, ste 2600

Note to Purchasing/Supplier: Supplier / Purchasing Dept. Instructions, Quote #12345.

Accounting Codes: Chart U, Index 944000, Account 3150, University of New Mexico, 113425-Purchasing Operations 092805, Lab Supplies Gen

Commodity Code: 2500, Supplies, Lab/Research

Supplier / Line Item Details

For selected line items: Add To Favorites

PO Number: To Be Assigned

View/edit by line item...

Hide line details

Grainger more info...

Product Description: HEPA Vacuum Size 7 G more info...

Catalog No: 2FTK2

Size / Packaging: EA

Unit Price: 845.00

Quantity: 2 EA

Ext. Price: 1,690.00 USD

Business Purpose/Detailed Item Description: Sample business purpose. copy to other lines

Required field

Manufacturer Name: ATRIX

Manufacturer Part Number: 421000007

More Information URL: http://www.grainger.com/Grainger/pr... more info...

UNSPSC: 41-10-49-19

Supplier subtotal: 1,810.00 USD

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal: 1,810.00

Total: 1,810.00 USD

See configuration for this requisition

view carts

31. After entering a business purpose, a link will be available to copy the business purpose to other lines. Copy to other lines of the requisition as appropriate, or repeat the steps to add a new business purpose to each line. Your requisition cannot be submitted without a business purpose for each line item.

Summary - Draft Requisition

Amie Ortiz profile | logout

2010-11-01 aortiz 01 | 3 item(s), 1,810.00 USD

Search for Catalog No. (SKU) Go

home/shop | favorites | forms | **carts** | approvals | history | profile | more >> | AAA

active cart | draft carts | favorites | my requisitions

General Shipping Billing Product Location Note to Purchasing/Supplier Accounting Codes Commodity Code **Final Review**

Return to shopping cart Continue Shopping

Place Order

All done! The required information has been completed and this request is ready to be submitted.
Once you have reviewed the details, you may continue by clicking the button at the top of the page.

Requisition PR Approvals PO Preview History

Summary Shipping Billing Accounting Codes Commodity Code Supplier Info

Hide header

<p>General</p> <p>Cart Name: 2010-11-01 aortiz 01</p> <p>Prepared by: Amie Ortiz</p>	<p>Shipping</p> <p>Ship To</p> <p>Contact Name: Department Administrator Phone: +1 (505) 277-5225 Email: aortiz@unm.edu ASST DEAN STUDENT AFFR&ADM-SOM MSC08 4690, BMSB Rm 106 918 Camino de Salud BMSC 1st Albuquerque, NM 87131 United States</p> <p>Delivery Options</p> <p>Ship Via: Best Carrier-Best Way Req Delivery: no value</p>	<p>Billing</p> <p>Bill To</p> <p>Attention: Doug Nelson Email: aortiz@unm.edu Phone: 505-277-2014 Accounts Payable MSC06 3540, Onate Hall Rm 222 Onate Hall 2nd Albuquerque, NM 87131 United States</p>
---------------------------------------------------------------------------------------------	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

View/edit by line item...

Product Location

Purchasing Department
Perovich Business Ctr, ste 2600

Note to Purchasing/Supplier

Supplier / Purchasing Dept. Instructions: Quote #12345.

Accounting Codes

Chart	Index	Account
U	944000	31S0
University of New Mexico	113425-Purchasing Operations 092805	Lab Supplies Gen

Commodity Code

Commodity Code: 2500
Supplies, Lab/Research

View/edit by line item...

Supplier / Line Item Details

32. Once you are finished editing the requisition, click on the **Place Order** button.

Submitted - Requisition 465096

Amie Ortiz profile | logout

Select Draft Cart or Add Item to Cart

Search for Catalog No. (SKU) Go

home/shop | favorites | forms | **carts** | approvals | history | profile | more >> | AAA

active cart | draft carts | favorites | my requisitions

Requisition Information

Congratulations! You have successfully submitted your request. If you need to view or print a copy, click Quick View or view its status on the Approvals Tab.

Here is a summary of the requisition. You can also retrieve this requisition at any time via the document history search page.

Requisition number	465096 view
Requisition status	Pending
Cart name	2010-11-01 aortiz 01
Requisition date	11/1/2010
Requisition total	1,810.00 USD
Number of line items	2

What would you like to do next? Here are links to some common actions.

- Search for another item
- View order history
- Check the status of an order
- Return to your home page
- Create new draft cart

33. The requisition is complete and automatically submitted to Banner for approvals and processing. To check the status of your requisition, click on the **view** link to the right of the LoboMart requisition number.

LoboMart - Placing an Order from a Non-Catalog Vendor

A non-catalog vendor does not have a catalog of products available through LoboMart. However, items for these non-catalog vendors can still be ordered. The user will input the item name/number, description and pricing information into the Non-Catalog Form.

The screenshot shows the LoboMart Home/Shop page. At the top, there's a navigation bar with links like 'home/shop', 'favorites', 'forms', 'carts', 'approvals', 'history', 'profile', and 'more >>'. Below this, there's a search bar with 'Catalog No. (SKU)' and a 'Go' button. A red circle highlights the 'non-catalog form' link in the navigation bar. On the left, there's a sidebar with 'Action Items' and 'My Orders'. The main content area shows 'Showcased Suppliers' with logos for Fisher Scientific, Sigma-Aldrich, VWR International, Beal's, Dell, and Gateway. There's also a 'Punch-out Lab Supplies' section.

1. To place an order with a Non-Catalog Vendor, choose the **Non-Catalog Form** link from your LoboMart home page.

The screenshot shows the 'Non-Catalog Form' page. At the top, there's a navigation bar with 'Supplier Info' and 'choose supplier...' link. Below this, there's a 'General Info' section with fields for 'Form Type', 'Catalog No.', 'Product Description', 'Quantity', 'Packaging', 'Estimated Price', 'Capital Expense', 'Product Size', and 'Health and Safety'. There's also a 'Configurable Fields' section with checkboxes for 'Controlled substance', 'Recycled', 'Hazardous material', 'Radioactive', 'Rad Minor', 'Select Agent', 'Toxin', and 'Energy Star'. A red circle highlights the 'choose supplier...' link.

2. Click on the **choose supplier...** link to search for the appropriate vendor.

Supplier Search

Supplier Name

Results per page 20

Search Cancel

3. Enter all or part of the supplier name in the **Supplier Name** field and click on the **Search** button.

Supplier Search

Supplier Name Albuquerque

Results per page 20

Search Cancel

Results per page 20 Suppliers found: 3 Page 1 of 1

Supplier Name / Address	Select
Albuquerque Image Products Inc Fulfillment Address 1: 4406 Towner NE Suite 1 Albuquerque, NM 87110 US	Select
Albuquerque Publishing Co Fulfillment Address 1: Po Box 95777 Albuquerque, NM 87199 US	Select
Albuquerque Valve & Fitting Fulfillment Address 1: PO Box 9135 Albuquerque, NM 87119 US	Select

4. To choose a supplier, click on the **Select** link to the right of the supplier name.

Non-Catalog Form

Available Actions (Click here for details): Add and go to Cart Go Close

Supplier Info

Supplier Albuquerque Publishing Co change... reset... more info...

Address Po Box 95777 Albuquerque, NM 87199 US

Supplier Phone +1 (505) 823-3168

Distribution

The system will distribute purchase orders using the method(s) indicated below:

Check this box to customize order distribution information. ☐

Fax +1 (800) 555-1212

Manual

Non-Configurable Fields

Form Type Non-Catalog Form

Catalog No.

Product Description

Quantity

Packaging EA - Each

Estimated Price

Capital Expense ☐

Configurable Fields

Product Size

Health and Safety

- ☐ Controlled substance
- ☐ Recycled
- ☐ Hazardous material
- ☐ Radioactive
- ☐ Rad Minor
- ☐ Select Agent
- ☐ Toxin
- ☐ Energy Star
- ☐ Green

Total 0.00

5. Your vendor information is now populated in the form. Complete the **Catalog No.**, **Product Description**, **Quantity** and **Estimated Price** fields.

https://usertest.sciquest.com - Non-Catalog Form - Microsoft Internet Explorer

Non-Catalog Form

Available Actions (Click here for details): **Add and go to Cart** **Go** **Close**

Supplier Info

Supplier: Albuquerque Publishing Co change... reset... more info...

Address: Po Box 95777
Albuquerque, NM 87199 US

Supplier Phone: +1 (505) 823-3168

Distribution

The system will distribute purchase orders using the method(s) indicated below:

Check this box to customize order distribution information. ☐

Fax: +1 (800) 555-1212

Manual

General Info

Non-Configurable Fields

Form Type: Non-Catalog Form

Catalog No.:

Product Description:

244 characters remaining expand | clear

Quantity:

Packaging:

6. To proceed to the **Edit Cart** screen to complete processing for your requisition, select **Add and go to Cart** from the **Available Actions** drop down menu and click on the **Go** button. If you wish to add more items to the cart before completing processing, select **Add to Cart and Return** before clicking on the **Go** button.

Cart - Draft Requisition

Amie Ortiz profile | logout

2010-11-01 aortiz 01 | 1 item(s), 2,200.00 USD

Search for Catalog No. (SKU) Go

home/shop | favorites | forms | **carts** | approvals | history | profile | more >> | AAA

active cart | draft carts | favorites | my requisitions

Shopping Cart for Amie Ortiz

Continue Shopping

1 Item(s) for a total of **2,200.00 USD**

Proceed to Checkout

Name this cart: 2010-11-01 aortiz 01

Have you made changes? **Update**

Help | Empty Cart | Perform an action on (0 items selected)...

Albuquerque Publishing more info...

Product Description	Unit Price	Quantity	Total
Item added on Nov 1, 2010 Advertising open form... Part Number Service	2,200.00 USD	1	2,200.00 USD

Add to Favorites Remove More Actions

See configuration for this requisition view carts

7. The remaining steps are the same for all LoboMart requisitions. Please see steps 8 through 33 from the **Placing an Order from a Catalog Vendor** procedure. (Page 25).

LoboMart – Setting Up and Ordering from a Vendor not in the LoboMart System

If the **preferred vendor is not loaded in LoboMart, a requisition can still be created**. After all steps are completed by the user, the Vendor Maintenance Group adds the vendor to LoboMart making it available in the future. Follow these steps to create a requisition when a vendor is not found in LoboMart.

1. First, perform a **Search** for the preferred vendor. If the search does not return the preferred vendor, the vendor must be set up in the system. Continue to create your requisition with 'Purchasing Setup Vendor' as the supplier.

2. Type "Purchasing Setup Vendor" in the **Supplier Name** field and click on the **Search** button. Click on the **Select** link.

3. Complete the Non-Catalog Item Form. Continue processing the requisition in LoboMart, but with one extra step detailed below.

Cart - Draft Requisition

Amie Ortiz profile | logout

2010-11-01 aortiz 01 | 1 item(s), 100.00 USD

home/shop favorites forms carts approvals history profile more >> AAA

active cart draft carts favorites my requisitions

Shopping Cart for Amie Ortiz

Continue Shopping

1 Item(s) for a total of 100.00 USD

Proceed to Checkout

Name this cart: 2010-11-01 aortiz 01

Have you made changes? Update

Help Empty Cart Perform an action on (0 items selected) Select All

Purchasing Setup Vendor more info...

Business 1 edit

1 University Of New Mexico, Test Synch 9/20/2010 10:21 AM, Albuquerque, NM 87131-0001 US

Product Description	Unit Price	Quantity	Total
Sample open form... Part Number ABC123	100.00 USD EA	1	100.00 USD

Item added on Nov 1, 2010

Add to Favorites Remove More Actions

See configuration for this requisition view carts

4. You must add a note to Purchasing from the Note to Purchasing/Supplier step in the checkout process. Click on the Proceed to Checkout button.

Note to Purchasing/Supplier - Draft Requisition

Amie Ortiz profile | logout

2010-11-01 aortiz 01 | 1 item(s), 100.00 USD

home/shop favorites forms carts approvals history profile more >> AAA

active cart draft carts favorites my requisitions

General Shipping Billing Product Location Note to Purchasing/Supplier Accounting Codes Commodity Code Final Review Place Order

Return to shopping cart Continue Shopping

You have completed the required information in this step. At this point, you can do the following:
Proceed to the next step: Accounting Codes. Go straight to the end: Final Review.

Requisition PR Approvals PO Preview History

Summary Shipping Billing Accounting Codes Commodity Code Supplier Info

Note to Purchasing/Supplier

These values apply to all lines unless specified by line item

Supplier / Purchasing Dept. Instructions edit

External Info

Supplier / Purchasing Dept. Instructions expand clear

Save Cancel

Price Quantity Ext. Price

100.00 1 EA 100.00 USD

Supplier subtotal 100.00 USD

Subtotal 100.00

Total 100.00 USD

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

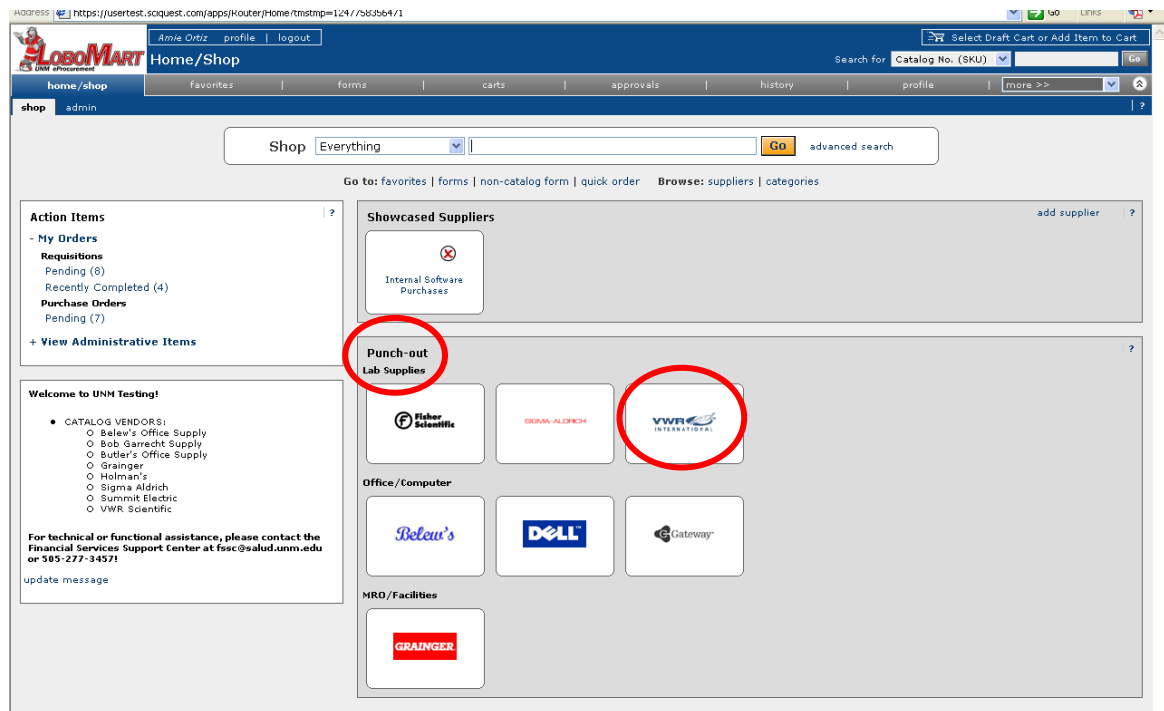
See configuration for this requisition

5. Enter the preferred vendor's name, address, contact name and number(s), and tax ID (if known). Click on the **Save** button.

6. After completing the requisition, a **Vendor Add/Change Request** must be completed. This form is located at **my.unm.edu** in the **UNM Business Applications** channel. Click on the **Electronic Forms** link. Click on the **Vendor Add/Change Request** form link in the list of online request forms.

LoboMart – Placing an Order from a Punchout Catalog Vendor

LoboMart Punchout Catalog Vendors allow access to all the functionality of the vendor's website, including real time product availability and University contract pricing.



1. To place an order with a Punchout Catalog Vendor, click on the vendor's logo in the **Punchout** list.



2. You will be directed to the vendor's web site. Simply search for the products to purchase and follow the instructions for the vendor's site.

SelectSite Punchout Cancel Punch-out

VWR **VWR.com** 1.800.932.5000 **UNM**

VWR# Any# My Account Order Status Shopping Basket
Order Entry

Items: 9 Total: \$518.11
logged in: aortiz@unm.edu

SEARCH for within All of VWR.com [Advanced Search](#) [MSDS](#) [Certificate of Analysis](#)

Home Products Services Programs Request a Catalog About Us Investors Contact Us

MY ACCOUNT TOOLS
[ChemStores \(CRLS\)](#)
[Shopping Lists](#)

MY ACCOUNT
[Shipping Info](#)
[Billing Info](#)
[Order Options](#)

VWR PROGRAMS
[Chemicals](#)
[Chromatography](#)
[Furniture](#)
[Healthcare/Clinical](#)
[Lab Animal Science](#)
[Leasing Program](#)
[Life Science](#)
[Site Services](#)
[New Lab Set Up](#)
[Controlled Environment](#)
[Safety](#)
[University](#)
[Validation & Calibration Services](#)

Shopping Basket

User:
Shipping Account Number: 2129635

Upload a List of Products
 Upload your comma delimited .csv file containing VWR part numbers, units of measure and quantities. [How to make an upload file](#)

Description	VWR Catalog Number	Unit	Quantity	Price	Your Price	Available	Extended Price
BDH ACETONE ACS 1 GAL POLY	BDH2002-1GLP	EA	<input type="text" value="3"/>	\$39.12	\$20.73	In Stock SAN FRANCISCO	\$62.19
VWR BEAKER GLASS LOW 10ML PK12	82000-122	PK	<input type="text" value="2"/>	\$61.62	\$38.20	In Stock DENVER	\$76.40
VWR BEAKER GLASS LOW 50ML PK12	82000-128	CS	<input type="text" value="4"/>	\$153.04	\$94.88	In Stock DENVER	\$379.52

Line Item Comments: [Edit](#)

ChemStores (CRLS): [GO](#)

Total: \$518.11

[Home](#) [Order Entry](#) [Products](#) [Services](#) [Programs](#) [About Us](#) [Fraud Warning](#)
[Site Map](#) [Help](#) [Contact Us](#) [Privacy Policy](#) [Terms & Conditions](#) [Investors](#)

Copyright © 2010 VWR International, LLC. All Rights Reserved.

3. Click on the **Checkout** button when shopping is complete.

Cart - Draft Requisition

Amie Ortiz profile | logout

2010-11-01 aortiz 01 | 6 item(s), 236.54 USD

Search for Catalog No. (SKU)

home/shop favorites forms carts approvals history profile more >> AAA

active cart draft carts favorites my requisitions

Shopping Cart for Amie Ortiz

Name this cart: 2010-11-01 aortiz 01

Continue Shopping 6 Item(s) for a total of 236.54 USD

Have you made changes? Perform an action on (0 items selected)... Select All

VWR International more info...

The item(s) in this group was retrieved from the supplier's website. What does this mean?
 You can no longer access this item(s) on the supplier's website. What does this mean?
 Line(s): 1, 2, 3

Product Description	Unit Price	Quantity	Total
Item added on Nov 1, 2010 VWR BEAKER, GRAD PP 15ML PK100 Part Number 47751-690 Manufacturer Info BMP-BK-15 - (VWR International) <input type="button" value="Add to Favorites"/> <input type="button" value="More Actions"/>	123.60 USD CS	1	123.60 USD
Item added on Nov 1, 2010 VWR BEAKER, GRAD PP 30ML PK100 Part Number 47751-692 Manufacturer Info BMP-BK-30 - (VWR International) <input type="button" value="Add to Favorites"/> <input type="button" value="More Actions"/>	19.06 USD PK	3	57.18 USD
Item added on Nov 1, 2010 VWR BEAKER, GRAD PP 100ML PK100 Part Number 47751-696 Manufacturer Info BMP-BK-100 - (VWR International) <input type="button" value="Add to Favorites"/> <input type="button" value="More Actions"/>	27.88 USD PK	2	55.76 USD

Have you made changes?

6 Item(s) for a total of 236.54 USD

See configuration for this requisition [view carts](#)

Done 100%

4. The order is loaded into the LoboMart system. Please see steps 8 through 33 from the **Placing an Order from a Catalog Vendor** procedure (Page 25) to complete the transaction.

LoboMart – Placing an Order with the P-Card

The Purchasing Card can be used to place an order from a Catalog vendor (Hosted or Punchout) in LoboMart.

Billing - Draft Requisition

2010-11-01 aortiz 01 | 6 item(s), 236.54 USD

Search for Catalog No. (SKU) Go

active cart draft carts favorites my requisitions

General Shipping Billing Product Location Note to Purchasing/Supplier Accounting Codes Commodity Code Final Review

You have completed the required information in this step. At this point, you can do the following:
Proceed to the next step: Product Location. Go straight to the end: Final Review.

Requisition PR Approvals PO Preview History

Summary Shipping Billing Accounting Codes Commodity Code Supplier Info

Hide value descriptions

Billing

These values apply to all lines unless specified by line item

Bill To

Billing address

Attention Doug Nelson
Email aortiz@unm.edu
Phone 505-277-2014
Accounts Payable
MSC06 3540, Onate Hall Rm 222
Onate Hall
2nd
Albuquerque, NM 87131
United States

P-Card Number

No credit card has been assigned.

edit

Supplier / Line Item Details

For selected line items Add To Favorites Go

VWR International more info...

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 VWR BEAKER, GRAD PP 15ML PK100 more info...	47751-690	CS	123.60	1 CS	123.60 USD

Bill To (same as header) edit

P-Card Number (same as header) edit

1. From the **Billing** step of the checkout process, click on the edit button for **PCard Number**.

active cart draft carts favorites my requisitions

General Shipping Billing Product Location Note to Purchasing/Supplier Accounting Codes Commodity Code Final Review

You have completed the required information in this step. At this point, you can do the following:
Proceed to the next step: Product Location. Go straight to the end: Final Review.

Requisition PR Approvals PO Preview History

Summary Shipping Billing Accounting Codes Commodity Code Supplier Info

Hide value descriptions

Billing

These values apply to all lines unless specified by line item

Bill To

Billing address

Attention Doug Nelson
Email aortiz@unm.edu
Phone 505-277-2014
Accounts Payable
MSC06 3540, Onate Hall Rm 222
Onate Hall
2nd
Albuquerque, NM 87131
United States

P-Card Number

No credit card has been assigned.

edit

Supplier / Line Item Details

For selected line items Add To Favorites Go

VWR International more info...

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 VWR BEAKER, GRAD PP 15ML PK100 more info...	47751-690	CS	123.60	1 CS	123.60 USD

Bill To (same as header) edit

P-Card Number (same as header) edit

P-Card Number

Select a P-Card from your profile.

Cardholder Name

Card Number

Card Security Code

Expiration Date 1 2010

Save Cancel Unassign

2. Select your PCard from the dropdown list.

active cart | draft carts | favorites | my requisitions

General Shipping Billing Product Location Note to Purchasing/Supplier Accounting Codes Commodity Code Final Review Place Order

You have completed the required information in this step. At this point, you can do the following:
Proceed to the next step: Product Location. Go straight to the end: Final Review.

Requisition | PR Approvals | PO Preview | History

Summary | Shipping | Billing | Accounting Codes | Commodity Code | Supplier Info

Billing

These values apply to all lines unless specified by line item

Bill To
Billing address
Attention Doug Nelson
Email aortiz@unm.edu
Phone 505-277-2014
Accounts Payable
MSC06 3540, Onate Hall Rm 222
Onate Hall
2nd
Albuquerque, NM 87131
United States

P-Card Number
No credit card has been assigned.

For selected line items | Add To Favorites | Go

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 VWR BEAKER, GRAD PP 15ML PK100	47751-690	CS	123.60	1 CS	123.60 USD

Bill To (same as header)

3. Click on the **Save** button.

Billing - Draft Requisition

Amie Ortiz profile | logout

2010-11-01 aortiz 01 | 6 item(s), 236.54 USD

home/shop | favorites | forms | carts | approvals | history | profile | more >>

active cart | draft carts | favorites | my requisitions

General Shipping Billing Product Location Note to Purchasing/Supplier Accounting Codes Commodity Code Final Review Place Order

You have completed the required information in this step. At this point, you can do the following:
Proceed to the next step: Product Location. Go straight to the end: Final Review.

Requisition | PR Approvals | PO Preview | History

Summary | Shipping | Billing | Accounting Codes | Commodity Code | Supplier Info

Billing

These values apply to all lines unless specified by line item

Bill To
Billing address
Attention Doug Nelson
Email aortiz@unm.edu
Phone 505-277-2014
Accounts Payable
MSC06 3540, Onate Hall Rm 222
Onate Hall
2nd
Albuquerque, NM 87131
United States

P-Card Number
Cardholder Name Amie M Ortiz
Card Number XXXXXXXXXXXX2222
Card Security Code
Expiration Date 1/2011

Supplier / Line Item Details

For selected line items | Add To Favorites | Go

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 VWR BEAKER, GRAD PP 15ML PK100	47751-690	CS	123.60	1 CS	123.60 USD

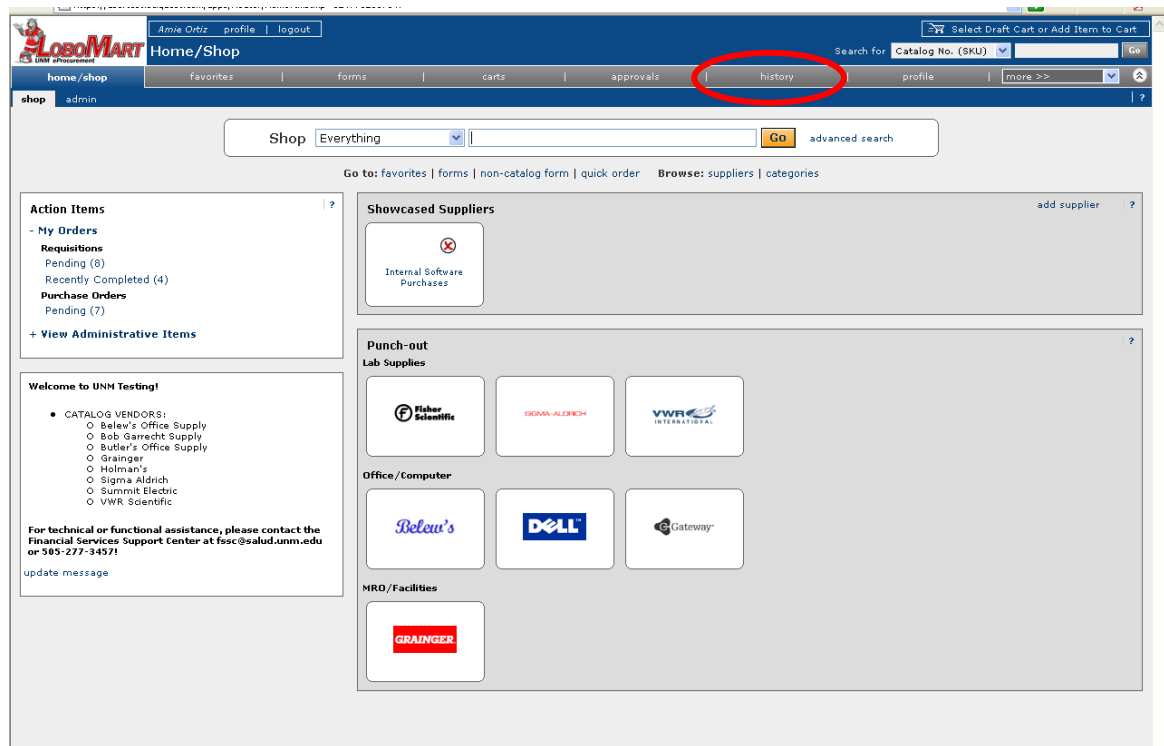
Bill To (same as header)

P-Card Number (same as header)

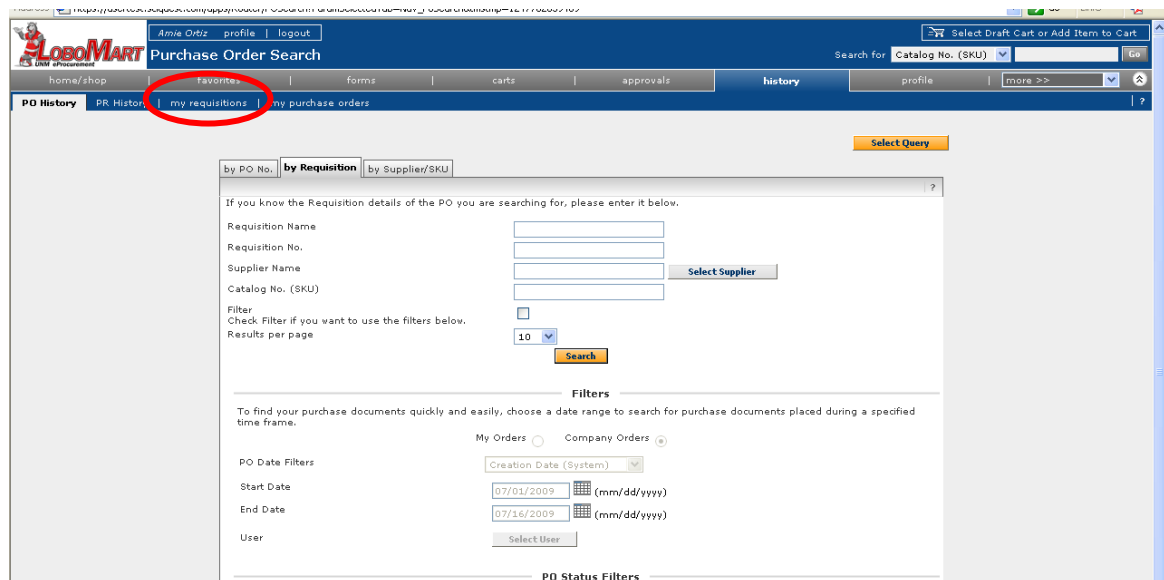
4. Complete entering any other information during checkout. When you click on the **Place Order** button your order will be sent directly to the vendor and billed to your PCard.

LoboMart – Check the Status of a Requisition

The status of a requisition can be tracked within LoboMart to determine if a requisition is pending, rejected or approved. Detailed information about the requisition is also available.



1. Click on the **history** link in the navigation bar on the LoboMart home page.



2. Click on the **my requisitions** tab.

Orders - Search Results

Amie Ortiz profile | logout

home/shop | favorites | forms | carts | approvals | history | profile | more >>

PO History | PR History | **my requisitions** | my purchase orders

New Search | Select Query | Save Query

Results per page: 20

Requisition(s) meeting the search criteria: 5

Status	Requisition No.	Supplier(s)	Requisition Name	Requisitioner	Requisition Date/Time	Requisition Total
	462784	Purchasing Setup Vendor	2010-10-27 aortiz 01	Ortiz, Amie	10/27/2010 9:34 AM	500.00 USD
	462785	Purchasing Setup Vendor	2010-10-26 aortiz 01	Ortiz, Amie	10/26/2010 5:09 PM	0.00 USD
✓	459562	Albuquerque Publishing Co	2010-10-21 aortiz 01	Ortiz, Amie	10/21/2010 4:52 PM	1.00 USD
✓	447255	Purchasing Setup Vendor	2010-09-28 aortiz 01	Ortiz, Amie	9/28/2010 9:46 AM	60,000.00 USD
✓	447190	Purchasing Setup Vendor	2010-09-28 aortiz 01	Ortiz, Amie	9/28/2010 9:46 AM	60,000.00 USD

New Search | Select Query | Save Query

2. This screen shows all of your completed LoboMart requisitions for the last 90 days. The requisitions can be sorted by status, requisition number, supplier, requisition name or requisition date/time. For more requisition detail, including the Banner requisition number for approved requisitions, click on the blue LoboMart requisition number. You can also click on the magnifying glass icon for a quick view.

Summary - Requisition 459562

Amie Ortiz profile | logout

home/shop | favorites | forms | carts | approvals | history | profile | more >>

PO History | PR History | **my requisitions** | my purchase orders

New Search | Select Query | Save Query

Available Actions: Add Comment | Go

Requisition | Approvals | Comments | Attachments | History

Summary | Shipping | Billing | Accounting Codes | Supplier Info

Hide value descriptions

General	Shipping	Billing
Cart Name 2010-10-21 aortiz 01 Prepared by Amie Ortiz	Ship To Contact Name Lucy Lobo Phone +1 (505) 277-2036 Email lucylobo@unm.edu PURCHASING DEPT UNM Business Center, Ste 2600 Test Synch 6/15/09 3:40p Albuquerque, NM 87131 United States Delivery Options Ship Via Best Carrier-Best Way Req Delivery no value	Bill To Attention: Doug Nelson Email: denelson@unm.edu Phones: 505-277-2014 Accounts Payable MSC06 3540, Onate Hall Rm 222 Onate Hall 2nd Albuquerque, NM 87131 United States Billing Options Accounting Date no value

View/edit by line item...

Internal Notes and Attachments	External Notes and Attachments
Product Location Purchasing Department UNM Business Center, ste 2600 Banner Req # R0117163	Supplier/Purchasing Dept Instructions no note

View/edit by line item...

Chart	Index	Account
U University of New Mexico	944000 113425-Purchasing Operations	6920 Other Professional Svcs-GEN (HM)

Commodity Code
3100
Services, Advertising tes

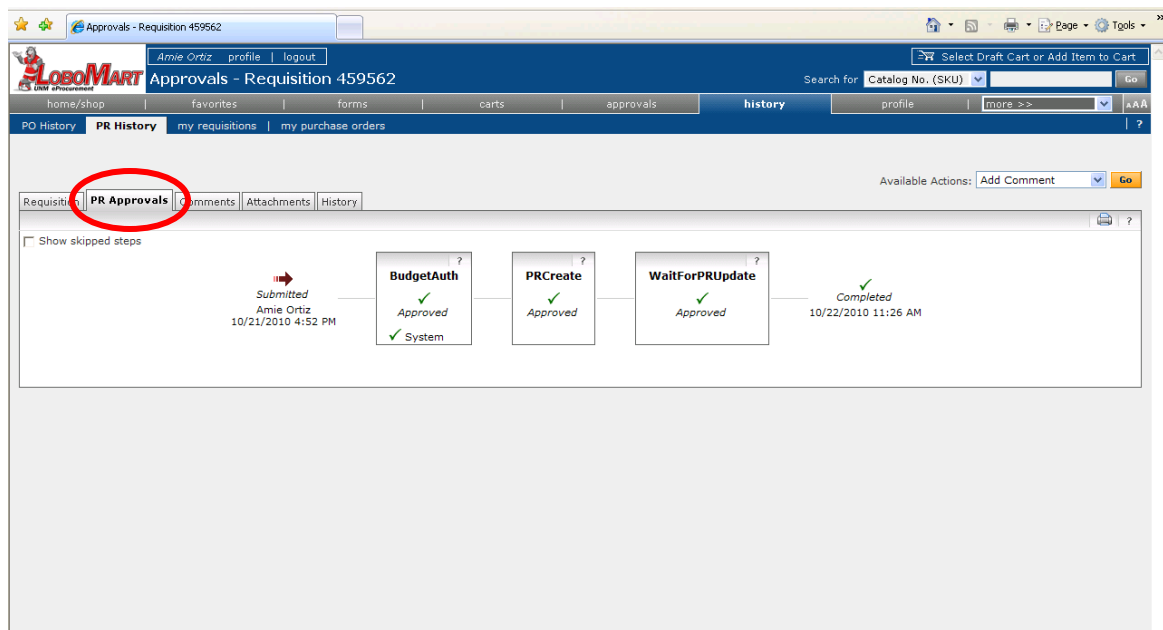
View/edit by line item...

Supplier / Line Item Details

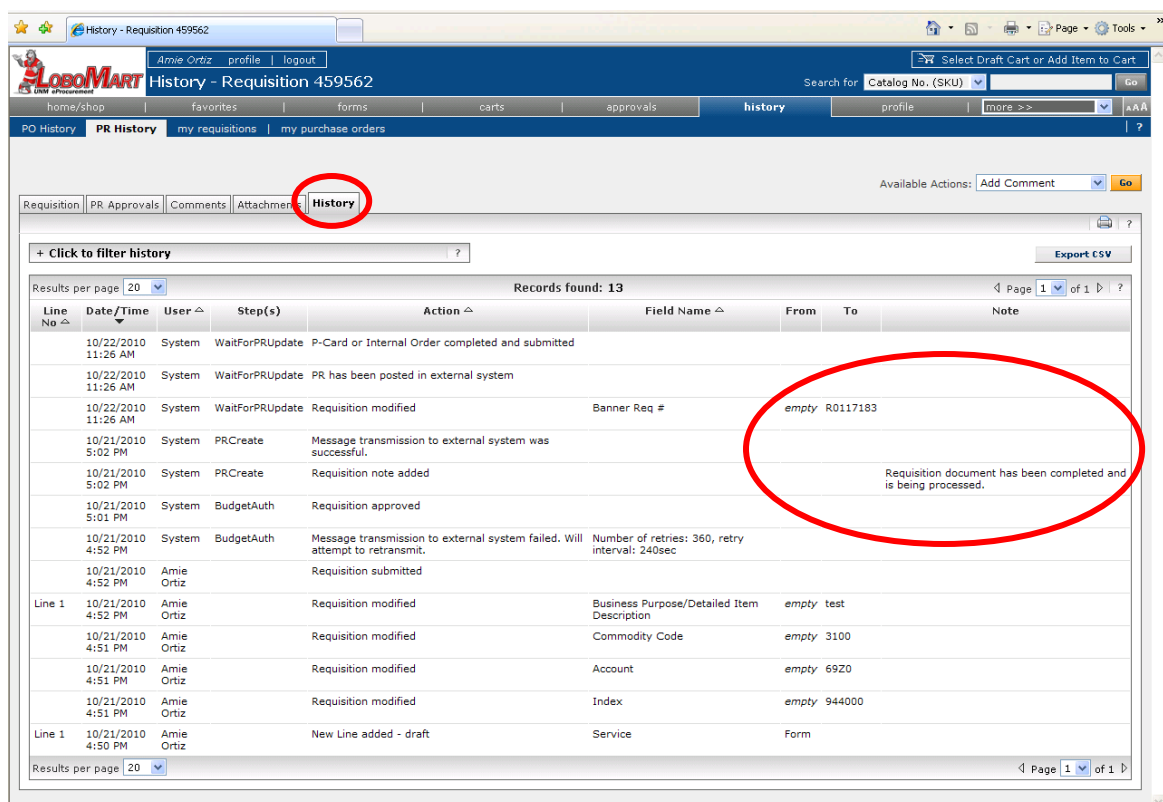
Hide line details

For selected line items | Add To Favorites | Go

3. The Requisition Summary screen appears. This is an example of an approved requisition. The Banner requisition number is in the **Product Location** section.

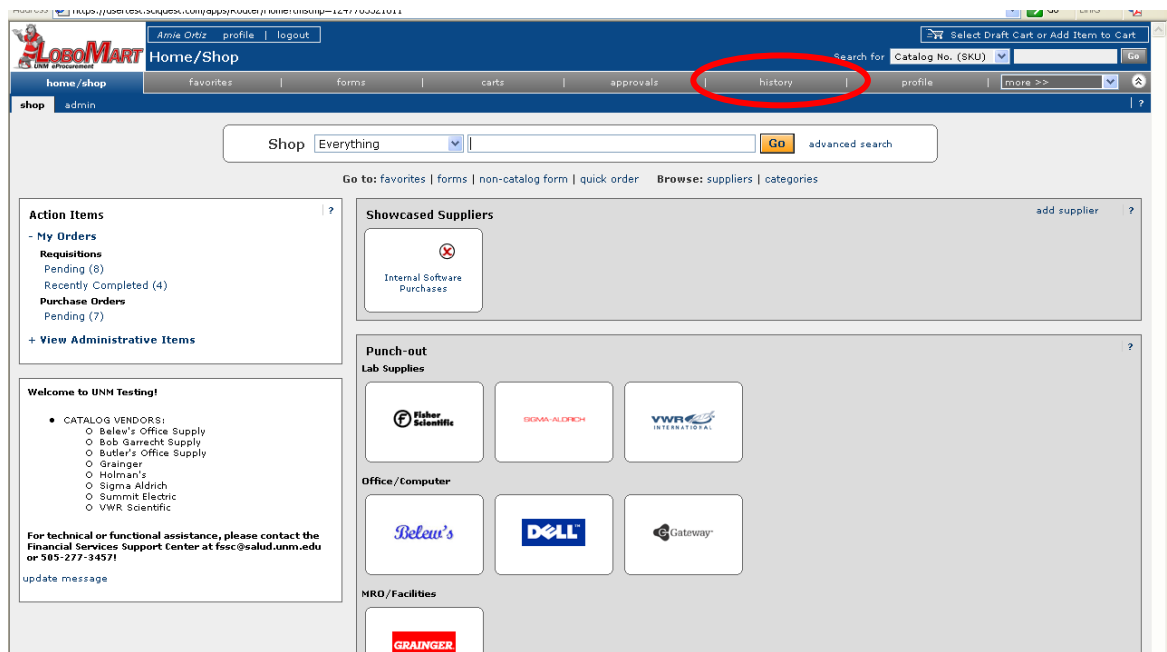


4. Click on the **PR Approvals** tab to view the status of a requisition.

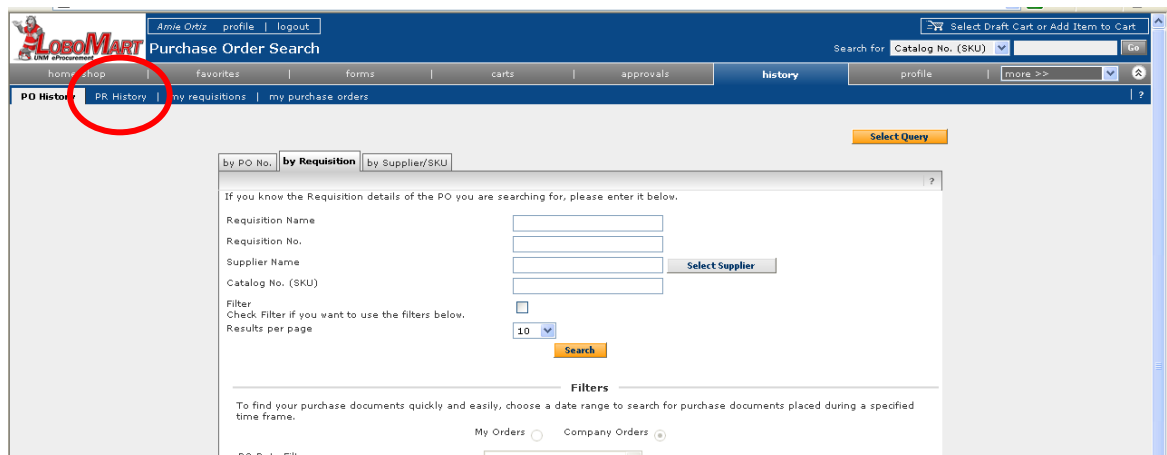


5. Click on the **History** tab to see detailed approval information and what processes occurred in Banner relative to the requisition. If the requisition is rejected, the approver's comments or Banner error message are displayed.

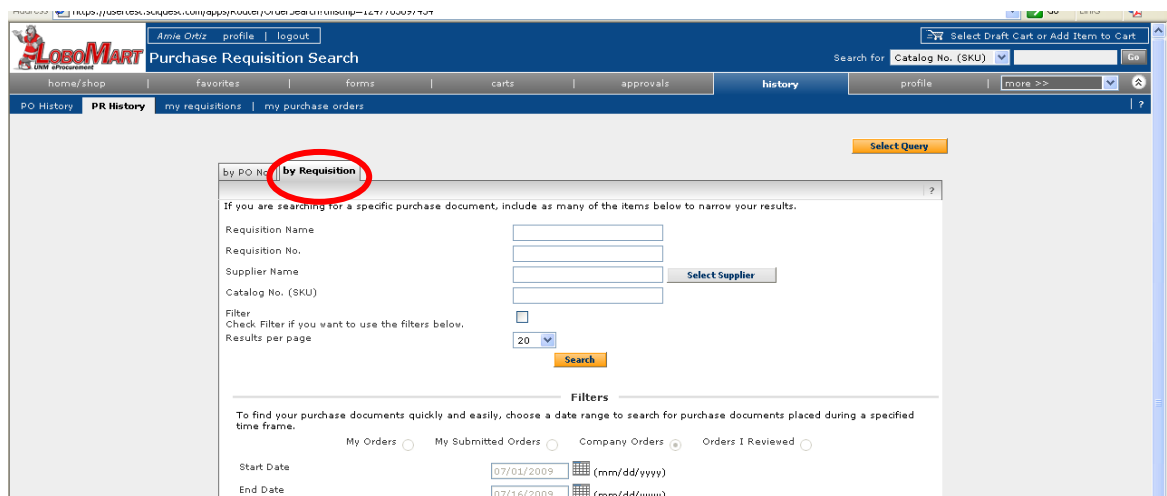
If the requisition has been removed from the **My Requisitions** folder, it can still be viewed using the following procedure.



1. Begin by clicking on **history**.



2. PO History will default. Click on the **PR History** tab.



3. Click on the **by Requisition** tab.

Purchase Requisition Search

home/shop | favorites | forms | carts | approvals | **history** | profile | more >>

PO History | **PR History** | my requisitions | my purchase orders

Select Query

by PO No. | **by Requisition**

If you are searching for a specific purchase document, include as many of the items below to narrow your results.

Requisition Name:

Requisition No.:

Supplier Name: Purchasing Setup Vendor

Catalog No. (SKU):

Filter: ☒ Check Filter if you want to use the filters below.

Results per page: 20

Filters

To find your purchase documents quickly and easily, choose a date range to search for purchase documents placed during a specified time frame.

My Orders ☐ My Submitted Orders ☐ Company Orders ☒ Orders I Reviewed ☐

Start Date: 03/01/2009 (mm/dd/yyyy)

End Date: 07/16/2009 (mm/dd/yyyy)

Prepared for:

Prepared by:

PR Status Filters

PR Status

-----Workflow-----
 Completed
 Pending
 Partially Rejected
 Rejected
 Withdrawn

PR Status

With Rejected Lines
 With Withdrawn Lines

Include PR's with Any of These Statuses

-----Show All-----

Only Include PR's with These Statuses

-----Show All-----

4. Enter your search parameters and click on the **Search** button. To narrow the search further, place a checkmark in the **Filter** checkbox and enter search filters before clicking on the **Search** button.

Orders - Search Results

Amie Ortiz | profile | logout

Orders - Search Results

Search for: Catalog No. (SKU) Go

home/shop | favorites | forms | carts | approvals | **history** | profile | more >>

PO History | **PR History** | my requisitions | my purchase orders

New Search | Select Query | Save Query

Results per page: 10

Requisition(s) meeting the search criteria: 11

Status	Requisition No.	Supplier(s)	Requisition Name	Requisitioner	Requisition Date/Time	Requisition Total
	46345	Purchasing Setup Vendor	Journal Ads	Ortiz, Amie	10/27/2010 2:29 PM	2,000.00 USD
✓	443187	Purchasing Setup Vendor	2010-09-20 mdesaute 01	Desautels, Marty	9/20/2010 9:55 AM	40.00 USD
✓	44344	Purchasing Setup Vendor	2010-09-20 mdesaute 01	Desautels, Marty	9/20/2010 9:55 AM	100.00 USD
✓	442665	Purchasing Setup Vendor	2010-09-17 mdesaute 01	Desautels, Marty	9/17/2010 8:53 AM	100.00 USD
✗	442389	Purchasing Setup Vendor	2010-09-16 mdesaute 01	Desautels, Marty	9/16/2010 5:19 PM	0.00 USD
✓	442419	Purchasing Setup Vendor	2010-09-16 mdesaute 01	Desautels, Marty	9/16/2010 5:18 PM	100.00 USD
✗	442418	Purchasing Setup Vendor	2010-09-16 mdesaute 01	Desautels, Marty	9/16/2010 5:17 PM	0.00 USD
✓	442416	Purchasing Setup Vendor	2010-09-16 mdesaute 01	Desautels, Marty	9/16/2010 5:17 PM	40.00 USD
	440421	Purchasing Setup Vendor	2010-09-13 mdesaute 01	Desautels, Marty	9/13/2010 2:29 PM	40.00 USD
	369985	Purchasing Setup Vendor	2010-03-04 aortiz 01	Ortiz, Amie	3/4/2010 2:23 PM	1,000.00 USD

Results per page: 10

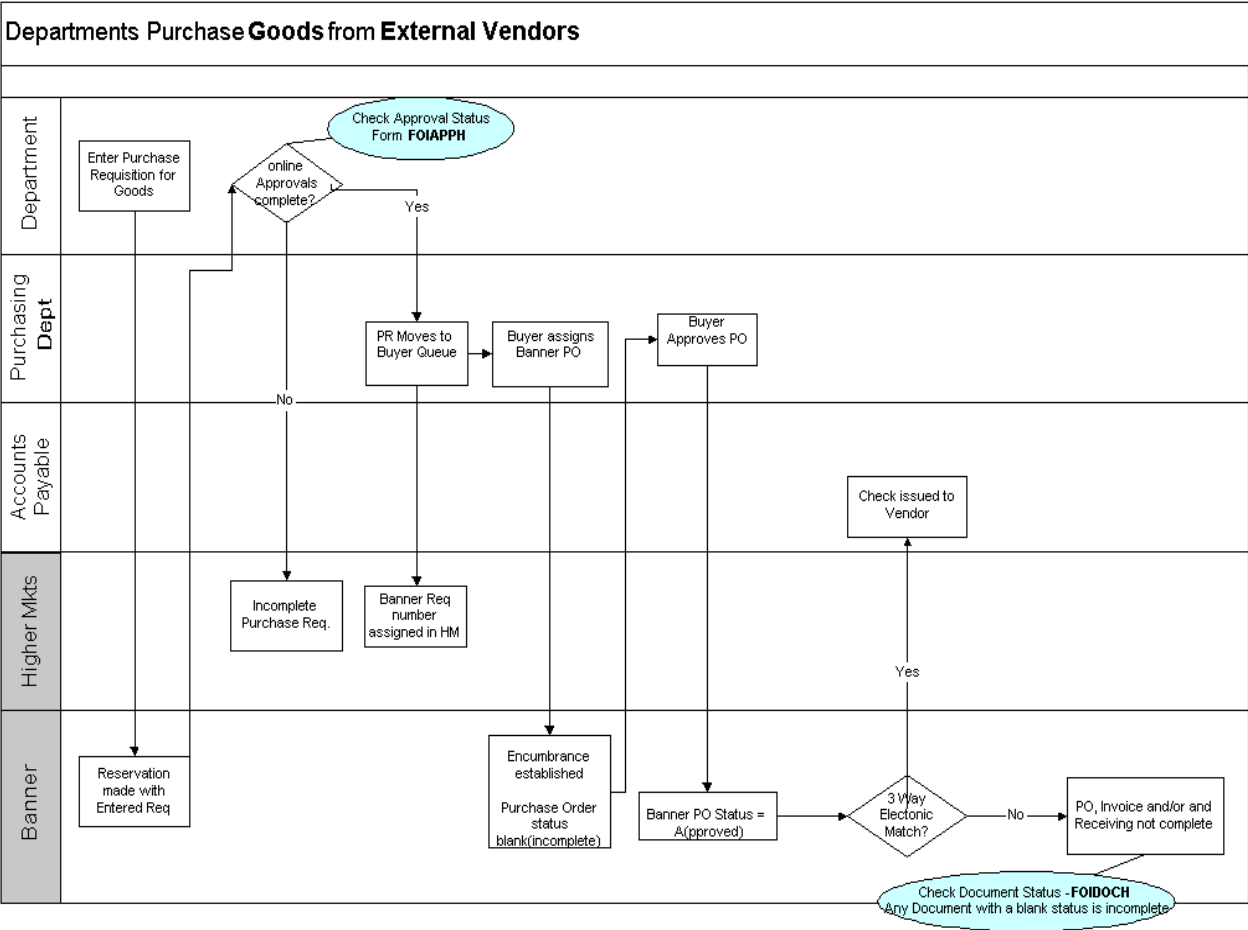
New Search | Select Query | Save Query

5. Choose the requisition you wish to view from the list of search results by clicking on the **LoboMart Requisition No.**

Flow Chart – Purchase of Goods

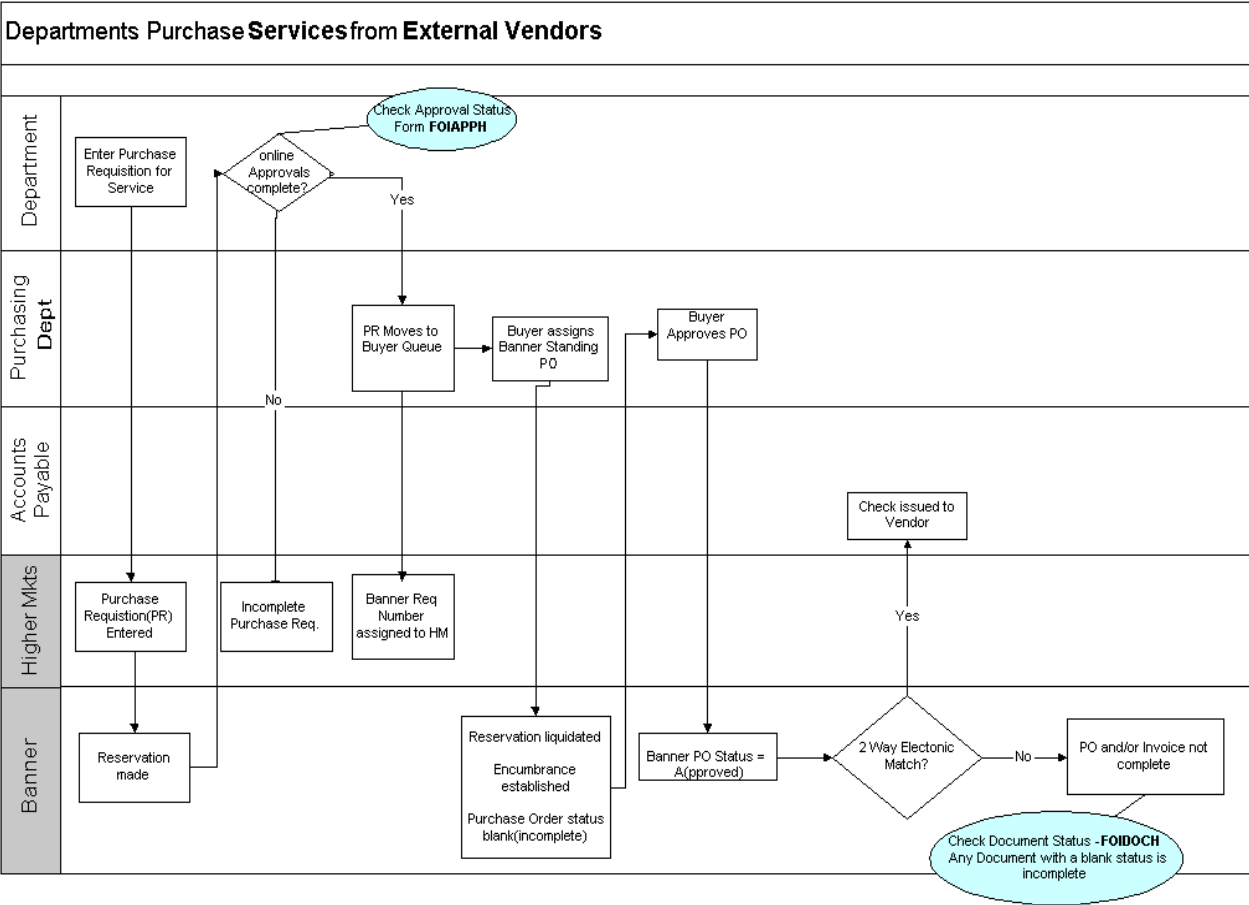
External Vendor

This diagram illustrates what occurs when a Department makes a P-Card purchase for goods from an external vendor. It is a ‘map’ of what application is used and where a process occurs. The diagram notes how to check approval status and how to check the status of a Journal Voucher.



Flow Chart – Purchase of Services – External Vendor

This diagram illustrates what occurs when a Department makes a P-Card purchase for Services from an external vendor. It is a ‘map’ of what application is used and where a process occurs. The diagram notes how to check approval status and how to check Journal Voucher status.



Section 2 – Receiving Documents

Exercise 1 - (Belew's) Entering a Banner Receiving Document: Creating a Banner Receiver for goods received on a Regular PO

NOTE: The Standard Operating Procedure (SOP) for using the Receiving Goods Form is available at <http://my.unm.edu>. Click on Finance Job Aids and End User Standard Operating Procedures.

Departments create Banner receiving documents for goods which automatically go through a 3-way 'match' process.

To access the **Receiving Goods Form**, enter **FPARCVD** in the Direct Access field.

1. Receiver Document Code - enter **"NEXT"**.
2. Perform a Next Block.
3. Click on the Search button ☐ for the Receiving Method field. From the pop up list, click on PARC Parcel Post; click the OK button.
4. Perform a Next Block.
5. Enter the Vendor's Packing Slip number _____. For our exercise, enter the Vendor's Invoice number. Your Belew's Invoice number should be your initials, followed by today's date (MMDD.) (e.g. TF0507)
6. Perform a Next Block.
7. Enter your Banner Regular PO number _____. Your Banner Regular PO number for your Belew's order is located on the slip of paper taped to the upper right corner of your monitor.
8. Tab. Notice the Buyer Name, Vendor Code, and Vendor Name automatically populate from the Banner PO number entered. Verify Belew's is displayed and the correct PO number has been entered. *Notice the message in the status bar.*
9. From the menu bar, click on Options and then click on Select Purchase Order Items. This opens the Receiving Goods PO Item Selection Form FPCRCVP ~ only accessible from within the Receiving Goods Form. This allows you to review the commodities and quantities ordered and note any quantities that have already been accepted (received) on the Banner Regular PO as compared to the Vendor's packing slip/sales order/invoice.

10. Perform a Next Block.
11. Place a checkmark in the Add checkbox next to the each of the **first three** commodities (index dividers, page markers, and notebooks).
12. Save. *Notice the message in the status bar.*
13. Click on Exit and click on YES to close the form. This closes the selection form and returns to the Receiving Goods Form.
14. Perform a Next Block. This opens the Commodity window of the form.
15. Tab to the Quantity Current –Received field of the displayed commodity (index dividers) and enter a quantity of seven “ **7** ”.
16. Tab twice and notice that the U/M (unit of measure) field automatically populates with the unit of measure for the displayed commodity.
17. Perform a Next Record. This causes the next commodity on the receiving document to be displayed.
18. Tab to the Quantity Current –Received field of the displayed commodity (page markers) and enter a quantity of two “ **2** ”.
19. Tab twice and notice that the U/M (unit of measure) field automatically populates with the unit of measure for the displayed commodity.
20. Perform a Next Record. This causes the next commodity on the receiving document to be displayed.
21. Tab to the Quantity Current –Received field of the displayed commodity (notebook) and enter a quantity of one “ **1** ”.
22. Tab twice and notice that the U/M (unit of measure) field automatically populates with the unit of measure for the displayed commodity.
23. Perform a Next Block. This opens the Completion window of the form.
24. Click on Complete.
25. Write down your Banner Receiver number _____. (Displayed in the status bar.) Banner Receiver numbers begin with “Y”.
26. Exit the form.

Exercise 2 - (VWR) – Entering a Banner Receiver Document: Creating a Banner Receiver for goods received on a Regular PO

To access the **Receiving Goods Form**, enter **FPARCVD** in the Direct Access field.

1. Receiver Document Code - enter **“NEXT”**.
2. Perform a Next Block.
3. Click on the Search button ☐ for the Receiving Method field. From the pop up list, click on PARC Parcel Post; click the OK button.
4. Perform a Next Block.
5. Enter the Vendor's Packing Slip number _____. For this exercise, enter the Vendor's Invoice number. (Your VWR Invoice number should be your initials, followed by today's date (MMDD) (e.g.TF0507)
6. Perform a Next Block.
7. Enter your Banner Regular PO number _____. (Your Banner Regular PO number for your VWR order is located on the slip of paper taped to the upper right corner of your monitor.)
8. Tab. Notice the Buyer Name, Vendor Code, and Vendor Name automatically populate from the Banner PO number entered. Verify VWR International is displayed and the correct PO number has been entered. *Notice the message in the status bar.*
9. From the menu bar, click on Options and then click on Select Purchase Order Items. This opens the Receiving Goods PO Item Selection Form FPCRCVP ~ only accessible from within the Receiving Goods Form. This allows you to review the commodities and quantities ordered and note any quantities that have already been accepted (received) on the Banner Regular PO as compared to the Vendor's packing slip/sales order/invoice.
10. Perform a Next Block.
11. Place a checkmark in the Add checkbox next to the **first, fourth, and fifth** commodities (cryovial holder, scrub brush, and glv, exam...).
12. Click on Save. *Notice the message in the status bar.*

13. Click on Exit and click on YES to close the form. This closes the selection form and takes you back to the Receiving Goods Form.
14. Perform a Next Block. This opens the Commodity window of the form.
15. Tab to the Quantity Current –Received field of the displayed commodity (cryovial holder) and enter a quantity of **one** “ **1** ”.
16. Tab twice and notice that the U/M (unit of measure) field automatically populates with the unit of measure for the displayed commodity.
17. Perform a Next Record. This causes the next commodity on the receiving document to be displayed.
18. Tab to the Quantity Current –Received field of the displayed commodity (scrub brush) and enter a quantity of **ten** “ **10** ”.
19. Tab twice and notice that the U/M (unit of measure) field automatically populates with the unit of measure for the displayed commodity.
20. Perform a Next Record. This causes the next commodity on the receiving document to be displayed.
21. Tab to the Quantity Current –Received field of the displayed commodity (glv, exam) and enter a quantity of **two** “ **2** ”.
22. Tab twice and notice that the U/M (unit of measure) field automatically populates with the unit of measure for the displayed commodity.
23. Perform a Next Block. This opens the Completion part of the form.
24. Click on Complete.
25. Write down your Banner Receiver number _____ (Displayed in the status bar.) Banner Receiver numbers begin with “Y”.
26. Exit the form.

Section 3 – Procurement Card Reallocation

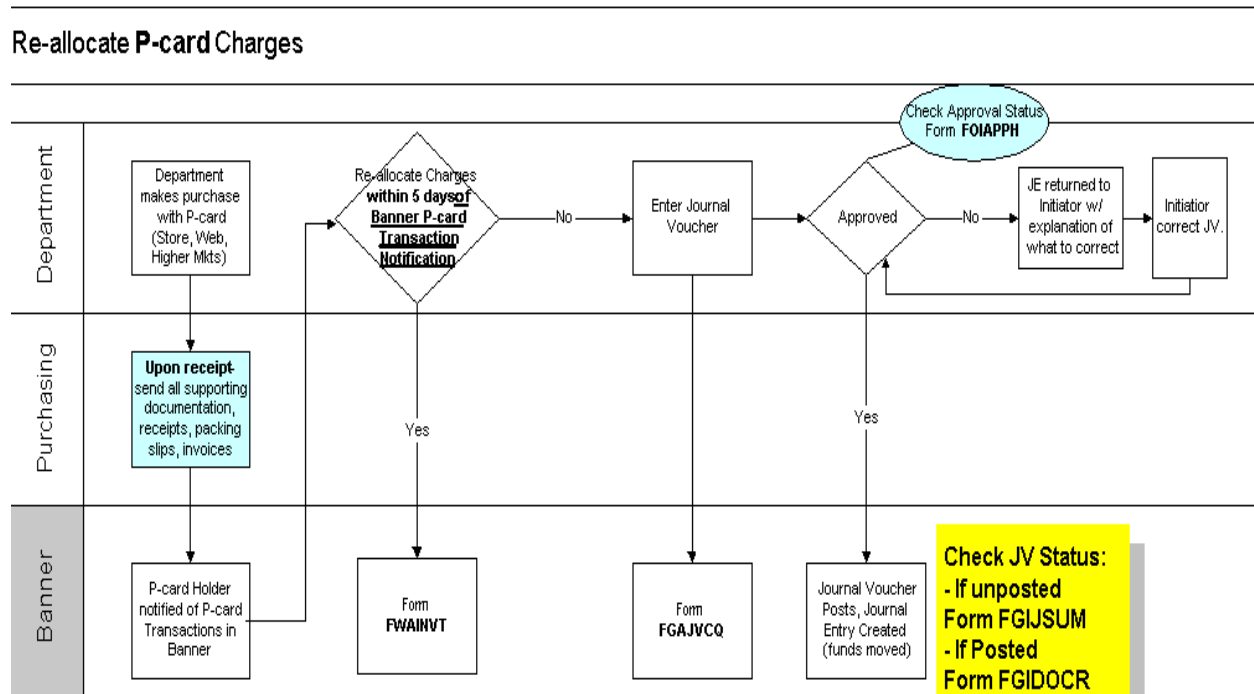
Account and/or business managers can make changes to the Fund, Organization, Account and Program (FOAP) or redistribute the FOAP information for Purchasing Card (P-Card) transactions.

To enter P-Card reallocations data entry form FWAINVT is used.

NOTE: A P-Card Banner Byte (demonstration) is available at <http://www.unm.edu/~fssc>. Click on “Banner Bytes”.

Flow Chart – Reallocate P-Card Charges

This diagram illustrates what occurs when a Department makes a P-Card purchase and reallocates the charges. It is a ‘map’ of what application is used and where a process occurs. The diagram includes form names on how to check approval status and Journal Voucher status.



Section 4 – Initiating Change Order and Vendor Request

Change Orders

To request a change order to a Purchasing Order a change order request must be submitted to the Purchasing Department. The Change Order Request form can be accessed through my.unm.edu. Click on the Electronic Forms link in the Banner Applications channel. Change order requests may include:

- Dollar increases or decreases
- Addition or deletion of line items
- FOAPAL changes
- Vendor 'Header' information

The Purchasing 'Change Order Request' form is located on my.unm.edu, under the Electronic Forms link.

Vendor Request

To request a new vendor be added to the vendor database a vendor request must be submitted to the Purchasing Department. The Vendor Add/Change Request form is located on my.unm.edu, under the Electronic Forms link.

Course Wrap-up

In this course, participants used LoboMart to:

- Create 'My Profile'
- Browse and place an order from a Hosted Catalog vendor
- Place an order with a Non-Catalog vendor
- Set up a new vendor
- Place an order with a Punchout Catalog vendor
- Check the status of a requisition

Participants learned

- The difference between Catalog and Non-Catalog Vendors
- How to Track the Status of a Requisition in Banner
- How to Receive Goods & Services
- How to Initiate a Change Order Request
- About the online Banner Byte for P-Card reallocation

Job Aids