E-PROCUREMENT SHOPPING GUIDE

E-Procurement is the process of purchasing goods and services online via the Internet. RISD has implemented e-Procurement as a shopping tool so that enabled campus shoppers are able to purchase goods and services from approved and/or contracted suppliers electronically. For RISD, this represents more efficient and transparent processes, increased leverage with vendors resulting in higher discounts and increased overall institutional savings based on volume purchases, and stronger relationships with high-quality, service-oriented contract vendors. For campus shoppers, e-Procurement represents ease of use, less paperwork and quicker response times. The e-Procurement shopping tool has been integrated with Datatel, RISD’s financial system of record, which allows for the capturing of spend data generated through these electronically-processed orders.

This guide provides instructions on utilizing the e-Procurement shopping tool. Once trained, campus shoppers will be able to utilize the shopping tool to access and browse supplier catalogs, add items to shopping carts, and create electronic requisitions for online approval.

System Login

1. Log onto www.esmsolutions.com
2. Close Pop-ups
3. Click login box in upper right corner
4. Click “ESM- Mercury Version”
5. Enter Customer ID: 029030000
6. Enter user name (same as financial system) and password.
7. You are now at the ESM Landing Page
8. Under Solutions, Click “easy purchase”

For assistance, questions, or issues: EPRO@RISD.EDU, 401-427-EPRO (3776)
For additional information and direct Purchasing contacts: https://info.risd.edu/purchasing/
Create a Shopping Cart--Hosted and PunchOut Catalog Suppliers

1. Click “Shop” Tab at top of page.
2. Select catalog—Click on catalog icon or drop down menu to select vendor and click “PunchOut.”
3. Browse catalog
   a. Browse using keywords or item #, select item(s), add quantity. “Add to Cart.”
   
   NOTE: You must add item(s) to cart BEFORE changing pages in a hosted catalog!
   b. After all items are placed in the shopping cart, click “Checkout.” (This will bring you back to ePro landing page.)
4. Click “Cart” Tab at top of page.
5. Review all items in cart, make any revisions necessary (quantity changes, delete items, etc.).
   *Note Regarding Shipping Charges: For estimated, additional, or next-day shipping charges, add a separate line item. This will enable later revisions when final charges are calculated and invoiced, if not known at time of order entry/placement.
6. Click “Continue” to convert cart to requisition. This step takes you to the “Checkout” tab.
7. Select requisition by clicking on arrow next to number at far top left. (This will expand/display all line items.)
8. Enter the following:
   a. Review Fiscal Date. Update if necessary.
   b. External Note: Enter specific delivery information/instructions to be printed on delivery label, such as recipient’s name & dept., bldg. name & address/floor/room number (keeping in mind that vendor/driver may not be familiar with all campus bldg. names). Additional information to convey to vendor can also be entered in External Note.
   *IMPORTANT: Please note that the specific delivery information detailed in the External Note will appear as PO Comments on the purchase order submitted to the vendor, and PunchOut catalog vendors will print on the shipping label the information entered in this field of the PO.
   c. Internal Note: Optional for internal use only
   d. Attachments: Optional for internal use only (quotes, etc.). Attachments will not be transmitted to the vendors.
   e. GL Account Code to which order will be charged
      i. Note: GL account code charges may be split by % or $. In order to split charges between multiple account codes, click on individual line items and add account code and percentage or dollar amounts until total equals 100%.
9. Review “Ship To” Location (Central Receiving-default) and “Deliver To” (enter recipient’s name, and building/floor/office number – abbreviate as necessary, as “Deliver To” field only allows for limited characters to be entered; additional delivery information should be entered under “external note” – see 8b above.)
10. Select Approval Route. Note: If more than one route has been assigned, the shopper will have the ability to select the appropriate route from a drop down box when creating a requisition. If only one route has been assigned, the assigned route will be the default route, and there will be no selection for shopper to make.
11. Click “Update.”
12. Click “Submit.” Note: The requisition has been submitted for approval. Upon approval, a purchase order will be issued and submitted to the supplier.
14. **Shoppers with Approval Authority** will receive notification (via landing page display, as well as email) that reads “Requisition Approval to Process.”

15. Click “Approval>Summary.” This will take you to the “Approval” tab. From this tab, you can select requisition(s) to be reviewed either individually or by range.

16. Click “View.” Any requisitions to be reviewed will be listed. Select a requisition to view detail, approve, or hold.

17. Click “View Detail,” then “View.” Review the following items and make any necessary revisions.
   a. Update Fiscal Date
   b. Update GL Account Code
   c. Update Ship To location
   d. Override Price or Quantity
   e. Add Shipping and Handling
   f. Add notes, both internal and external
   g. Add attachments. Attachments are for internal use and will not be transmitted to vendors.

18. Once review is complete and needed changes have been made, check “Approve” box.

19. Click “Submit.” Confirmation that the request has been submitted for purchase order issuance will appear.


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**Create a Shopping Cart--Non-Catalog Suppliers**

1. Click “Shop” Tab.
2. Click “Non-Catalog Items.”
3. Select vendor by entering name or first 3 letters of vendor name, click “Go.”
4. Click on vendor name
5. Click “New Item.”
6. Enter the following:
   a. Item information--description, item(s) #, manufacturer name, etc.
   b. Unit of Measure (UOM)
   c. List Price
   d. Quantity
   e. Click “Add to Cart”
   f. For additional shipping/next day charges, add as a separate line item. This will enable later changes to be made when final charges are calculated and invoiced, if not known at time of order entry/placement.
   g. When shopping is complete click on the “Cart” tab at top of page.
7. Proceed with steps 5-20 above.
Receive a Purchase Order

1. Click on the “Receive” tab
2. Enter PO number
3. Submit
4. To Receive a complete order:
   a. Check “Receive All Open Items.” Note: Do not check “Close All Line Items.”
   b. Enter internal notes if needed.
   c. Click “Submit.”
   d. Confirmation that “Receiving information for purchase order XXXXXX has been submitted” will appear.
5. To Receive a partial order for goods or services:
   a. Review each line, enter number of items received or number of service hours completed, etc., according to the unit of measure (UOM) originally entered and on which the pricing for goods or services is based (Do Not check “Close All Line Items.”):
      *Example 1*: Line item for 5 packages ordered – if only 3 packages received to date, enter 3 on the line.
      *Example 2*: Line item for 20 service hours – if 10 service hours have been completed to date and require partial payment to service provider, enter 10 on the line.
   b. Enter internal notes if needed.
   c. Click “Submit.”
   d. Confirmation “Receiving information for PO XXXXXX has been submitted” will appear.

Delivery Issues

*Should you experience a delivery-related issue (physical receipt of an order), please notify Purchasing and provide a copy of the delivery label so that it can be addressed and resolved immediately and avoided in the future.*

Approve a Requisition

1. Review Landing page for notifications. Any requisitions to process will be detailed with a line stating “Requisition Approval to process.”
2. Click “APPROVAL>Summary.” This will take you to the “Approval” tab. From this tab, you can select requisition(s) to be reviewed either individually or by range.
3. Click “View.” Any requisitions to be reviewed will be listed. Select a requisition to view detail, approve, or hold.
4. Click “View Detail,” then “View”: this screen will allow you to do the following operations
   a. Update Fiscal Date
   b. Update GL Account Code
   c. Update Ship To location
   d. Override Price or Quantity
   e. Add Shipping and Handling
   f. Add notes, both internal and external
   g. Add attachments. Attachments are for internal use and will not be transmitted to vendors.
5. Check “Approve” box.
6. Click “Submit.”
7. Confirmation that the request has been submitted for purchase order issuance will appear.

Reject a Requisition
1. Receive notification stating “Requisition Approval to process”
2. Click “APPROVAL>Summary.” This will take you to the “Approval” tab. From this tab, you can select requisition(s) to be reviewed.
3. Click “View.” Any requisition to be reviewed will be listed. Select a requisition to view detail, approve or hold.
4. Click “View Detail,” then “View.” This screen will allow you to do the following operations:
   a. Update Fiscal Date
   b. Update GL Account Code
   c. Update Ship To location
   d. Override Price or Quantity
   e. Add Shipping and Handling
   f. Add notes, both internal and external
   g. Add attachments. Attachments are for internal use and will not be transmitted to vendors.
5. To reject a requisition, click “Reject” box.
6. Provide reason for rejection in the box titled Rejection Reason and click “Submit.”
7. Confirmation that the request has been submitted will appear. Requisition will be returned to the original requisitioner.
9. Original requisitioner will receive notification stating “Returned order/Requisition to Process.”
   Click “Check out>Returned.”
10. Review requisition and click on arrow at left to review requisition by item.
11. Click edit to review rejection reason in internal notes. Dependent upon note, make any necessary revisions to complete requisition and then click “Submit.”

Delete an Item
1. In Checkout Tab, review requisition.
2. Click on arrow at left to review all items.
3. To delete an item, click on “Delete” button at right.
4. Review pop-up box and confirm removal of item(s).
5. Item is now deleted.
6. To continue with requisition, click “Submit” and continue process.

Delete a Requisition
1. To delete a requisition, each line item needs to be deleted.
2. Click on arrow at left to review all line items detailed on the requisition.
3. Click on “Delete” button at right for each item to be deleted.
4. Review pop-up box and confirm removal of item(s). After all line items are deleted, requisition will be marked as “Status: Deleted.”

Establish a Delegate
Shoppers with Approval Authority may set up a delegate as instructed below. Shoppers without Approval Authority will need to contact the program administrator at EPRO@RISD.edu.

1. In the upper right corner, click “User Preferences”
2. Click “Delegation”
3. Select appropriate Approval ID
4. Click Submit
5. Click Add Delegate and select the appropriate Approver (only another Approver can be a delegate)
6. Enter the dates delegate will be needed (if end date is not entered, delegation will continue indefinitely)
7. Click Update
8. Click Submit