

Manager's manual

#### Dear User,

this manual explains the use of Purchasing service through electronic catalog and online transaction as Manager.

We kindly suggest you take few minutes to read it in order to take full advantage of the Service.

For the workflow, see the Service Portal.



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#### Overview

□ The approver logs on the Portal Service to process the shopping baskets created by the requesters.

• Every shopping basket has to be approved.

□ The system creates an approval message and, through a workflow, sends it in the approver Inbox.

□ The Inbox contains Shopping Baskets to approve (completely or partially)

□ In the case of partial approval, the shopping basket goes back to the requester that can:

- accept rejected items;
- change the shopping basket

In the first case the purchase order is created automatically, in the second case the shopping basket is sent again to the approver for validation.





On the first page there are listed system messages.



# Modify personal settings

e-Procurement	Horr	
• 0	hange Settings	
Shopping Basket	Save Reset	
Personal settings	Manufatana Data dat	hours Data
Change Personal Settings	Mandatory Data Ad	iress Data
F INDOX	User ID	RICH01UK
	First Name	John
	Last name	Monty
	E-Mail Address	RICH01UK.test@test.test
	Organizational Unit	50002437
	Organizational unit name	Adriaplin

The user also has the possibility to change some parameters of his User ID (e-mail address, phone number, ..).

Proceed in the following manner:

□ Select under the menu *Personal Settings* the voice *Change Personal Settings* 

Choose one of the folders (*Mandatory Data* or *Address Data*).



# Modify personal settings

e-Procurement	Hom	
( (	Change Settings	
Shopping Basket	Save Reset	
Change Personal Settings	Mandatory Data Add	iress Data
Inbox	Linex ID	
	User ID	
	First Name	John
	Last name	Monty
	E-Mail Address	RICH01UK.test@test.test
	Organizational Unit	50002437
	Organizational unit name	Adriaplin
	Organizational unit name	Adriapiin

The first folder *Mandatory Data* allows to change data such as your name, surname and email address. These three data are compulsory!

- □Push Save to confirm changes
- Push Reset to return to the initial data



# Modify personal settings

	_	Home I Settings	:   Logio	ff	THE C	KX24	
•	Change Settir	igs					
<ul> <li>Shopping Basket</li> </ul>	Save Reset						
Change Personal Settings	Mandatory Data	Address Data					
▶ Inbox	Academic title	•					
	Title	Mr. 💌					
	Building	Pal.C	Room Number	2323			
	Floor	3° piano					
	Internal mail						
	Telephone Number	02520	Extension	43025			
	Fax Number		Extension				
	Date Format	DD.MM.YYYY					
	Decimal Notation	1.234.567,89 💌					

Inside the folder *Address Data* it is possible to change some parameters associated to the User ID which are not compulsory.







first page (visible only if there are some messages).



## Shopping basket approval

e-Procurement	Home Settings Log att	KX ANA	
4	Approval		
▼ Inbox	Approval Messages		
Messages			
<ul> <li>Personal settings</li> <li>Chnge personal settings</li> </ul>	rere you can approverreject snopping carts, contirmations of goods receipts, and so on. Select 'Edit' to display details		
	Approval: 5 Entries		
	Description	Received on	Action
	. Shopping Basket Approval	01.03.2011	S S S S S S S S S S S S S S S S S S S
o view Shoppi	ing Basket Details, push the descript	tion or the icon 🛛 🖳	
o approve imr	mediately and completely the shoopir	ng basket, push the icon	<b>2</b>



# Shopping Basket partial approval

In the second								
Items in Shopping Cart		<b>a</b>						Display Ct
To change item details (assets and cost assi	ignment), select the link below o	r select 🥆						
Approved Rejected	Good / Service	Description	Category	Required on	Quantity	Price / Limit	Cost Assignment	Action
		Cancelleria 1		26.02.2011	10 ST	4,00 EUR Per 1 ST	Cost Center BR100	۹ (
		Cancelleria 6		26.02.2011	10 ST	7,00 EUR Per 1 ST	Cost Center BR100	۹ (
				Total	Value (Net) :	110,00 EUR		
Additional Specifications	45:39							
Notes for Approval	Add Note							
Approval Preview	**************************************							
Save	And							
	**************************************							
To approve an	item, tick i	n the App	roved f	ield				
To reject an ite	m <u>, tick_i</u> n	the Reject	ted fiel	d.				
After that push	Save							
The system cre	ates a reie	ect messac	ne in th	e request	er Inh	ox The reque	ster has to cha	ande

The system creates a reject message in the requester Inbox The requester has to change the Shopping Basket and to send again for approval.



### Shopping basket details

Items in Shopping Car	t											
To change item dataile (s	ssate and onet assis	nment) select the link below	nr selart 🔍									Display C
Items in Shopping Ca	rt	griment), select the link below (										
Approved	Rejected	Good / Service	Description	Category	Required on	Qua	intity		Price / Limit	Co	ost Assignment	Action
۲	0		Cancelleria 1		26.02.2011	10	ST	4,00	EUR Per 1 ST	Cost Center E	3R100	) 🔍
0	۲		Cancelleria 6		26.02.2011	10	ST	7,00	EUR Per 1 ST	Cost Center E	3R100	۵ 🔍
Total Value (Net) : 110,00 EUR												
Additional Specificatio	ns											•••
Name of Shopping Cart Notes for Approval <u>Approval Preview</u>	RICH01 24.02.2011 1	Add Note									*****	
Save												
									*****	••		
To view	Shopp	ing Basket	: Details , p	oush th	ie icon	Ģ		••				



#### Shopping basket details

Every folder contains item data.



Click **b** to open window and **c** to close window.

Item	ns in Shopping Cart												
Тос	change item details (as	sets and cost assign	nent), select the link below or	select								Dis	play C
Ite	ms in Shopping Car	t											
	Approved	Rejected	Good / Service	Description	Category	Required on	Qua	antity		Price / Limit	Cost Assignmen	t A	Action
	۲	0		Cancelleria 1		26.02.2011	10	ST	4,00	EUR Per 1 ST	Cost Center BR100	Q	0
	0	۲		Cancelleria 6		26.02.2011	10	ST	7,00	EUR Per 1 ST	Cost Center BR100	9	<b>)</b> ()
<b></b>						Tota	I Value	(Net) :	40,00	EUR			
	<ul> <li>Basic Data</li> <li>Cost Assignment</li> <li>Collapse Area</li> </ul>												
	Account Assign	ment Overview								-			
	Line         Percentage         Assigned to         Description         G/L account no.         Description         Business Area         Action           1         100,00         Cost Center BR100         Cost Center BR100         611114         Cost Center BR100         <										Action		
	<ul> <li>Documents and A</li> <li>Ship-To Address/H</li> </ul>	ttachments Performance Location											



#### Exit e-Procurement



To exit e-Procurement it is necessary to:

Push the button



Do not close pushing 🗵!!



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For information and support please call the e-Business Service's Contact Center available both by telephone and via e- mail.

# Please find our support contact details and working times on the Service portal.



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