



# PROCUREMENT & PROPERTY

Office of the Chief Financial Officer



## USER GUIDE

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# 1 INTRODUCTION

## 1.1 What Is eBuy?

eBuy is the Laboratory's online ordering solution for common office, laboratory, and computer supplies.

For more information go to: <http://procurement.lbl.gov/welcome-to-procurement-property/make-a-purchase/ebuy/>

## 1.2 Key Things to Know

- **Approvals:** Some purchases may require pre-approval based on item type or dollar amount. Learn more about eBuy roles [here](#).
- **Intentional splitting** of an eBuy order into multiple orders to circumvent required approvals or the maximum eBuy order dollar limit is prohibited.
- **Firefox** is the recommended browser.
- **The system will time out** after two hours of inactivity in either the eBuy Marketplace or FMS.
- **Navigating the eBuy Marketplace:** Use the Marketplace navigation tools rather than your browser's tools or the navigation path provided in the FMS header. See the [Marketplace Navigation Guide](#) for an overview of the Marketplace landing page.
- **When completing your order (the requisition) in FMS:**
  - The **Ship to Location** default is LBNL Main Receiving. Be sure to change the location if appropriate. You can choose Will Call at Building 69, or one of four Ship to Locations: 1) LBNL Main Receiving, 2) Metal Stores Building 79, 3) JGI Receiving, or 4) eBuy Brookhaven Laboratory. (NO DELIVERY is not applicable.)
  - **Requisition Comments Field:** Do not use this field. Comments provided here will not be seen by the supplier.
  - **Perform the Budget Check** or your order may be delayed.
  - If the **Budget Status shows as "Error"** on the Requisition Confirmation page, there may be a funding issue with your order. You need to contact your Resource Analyst.

- **When using Manage Requisitions** to look up your requisition status:
  - The list can contain up to 100 lines. If more lines need to be viewed, it is recommended that you narrow your search parameters.
  - Although one requisition is prepared for the order, you might have selected products to be ordered from more than one supplier. If this is the case, each supplier will be issued a separate unique purchase order.

- [The eBuy website](#) provides information on managing your order, such as:

Overnight Ship	Return an Item
View an Order	Check on Missing Items
Check on an Order	Return Damaged Items
Cancel an Order	Suggest or Special Order an Item
Change an Order	Get Help With a Late Item

- Most suppliers in eBuy do not charge for freight, but there are some exceptions. A list of **suppliers that may charge freight** is provided [here](#).
- **Email confirmation** should be sent to you from the supplier when your order has been placed.

### 1.3 Time-Saving Tips

Throughout this User Guide we've provided time-saving tips. If you click on any of the links listed below, you'll be directed to the pertinent section of the User Guide.

- **Apply the Same Options to All Lines** (e.g., Ship to Location, Attention To, Project ID/Activity ID /Work Order Number) (see [Section 5.1](#))
- **Set a Default Project and Activity** for all orders (see [Section 5.1.1](#))
- **Turnoff the Autofill Function** when completing your order (see [Section 5.1.2](#))
- **Get Better Search Results** by Selecting a Category and Using Quotes (see [General Search Tips](#) and [Section 3.1.3](#))
- **Unable to Complete Your Order?** Retrieve Last Active Cart Under the Shopping Cart Icon (see [Section 4.2.1](#))
- **Order From Multiple Suppliers** Using One Cart/Requisition (see [Section 4.3.3](#))
- **Reorder Products** From Your Cart History (see [Section 3.4.2](#))
- **Share a Cart Copy** With Someone Else Using Saved Carts or Cart History (see [Section 3.4.2](#))
- **Order Many Different Items By Part Number** (see [Section 3.4.3](#))

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- **Cannot Find an Item From an eBuy Supplier?** Get a Quote, Then Use the e-Forms Tab to Place the Order (see Section [3.4.4](#))
  - **Not Ready to Order Yet?** Save Your Cart for Future Use (see Section [4.3.5](#))
  - Create a **Customized List** of eBuy Suppliers Using the My Suppliers Tab (see Section [3.1.5](#))
  - Shop **Frequently Used Suppliers** (see Section [3.1.1](#))
  - Use **Recent and Saved Searches** (see Section [3.4.1](#))
  - Browse Available **Laboratory Excess (Salvaged) Items Under Recommended Products** (see Section [3.1.2](#))
  - Browse Laboratory Recommended **Ergonomic Products** (see Section [3.1.2](#))

## 1.4 Getting Help

For additional help with eBuy:

- Visit the [eBuy website](#)
- Visit the [eBuy Tutorials Page](#)
- Send email to [ProcurementHelp@lbl.gov](mailto:ProcurementHelp@lbl.gov)
- Contact the Procurement Customer Service [Help Desk](#) at extension 6400 (staffed Monday - Friday from 8:00 am - 5:00 pm)

When asking for Procurement Customer Service assistance, please provide the following information as applicable:

- What is the nature of the problem or the error message?
- What were you working on in the system when the problem occurred?
- Do you have a screenshot of the error?
- Can you duplicate the problem?

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## 2 GETTING STARTED

### 2.1 Overview from Start to Finish



Placing and managing eBuy orders is a 4-step process. All of these steps will be described in this User Guide and are also covered in the eBuy [4-Step Guide](#).

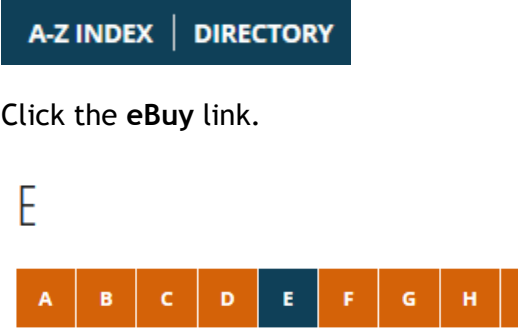


1. First, you'll log into the eBuy Marketplace.
2. Then, you'll search, shop, and place items in your shopping cart.
3. You'll check out.
4. Your order will be completed in the Financial Management System (FMS), approved if needed, and sent to the supplier.

You can always manage the status of your order using the Manage Requisitions function in the Laboratory's Financial Management System, also known as FMS.

## 2.2 Logging Into eBuy

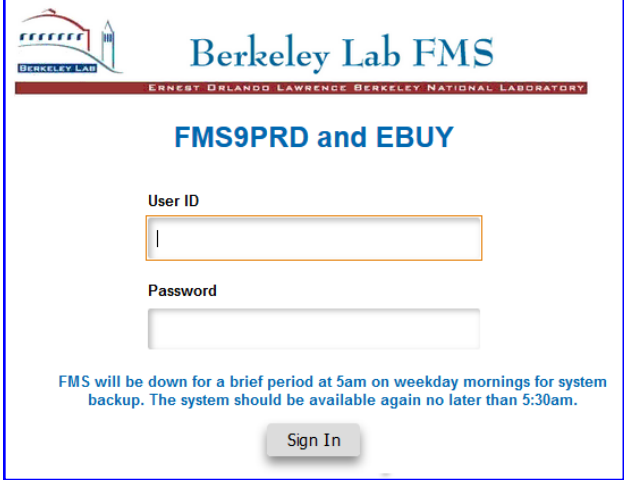
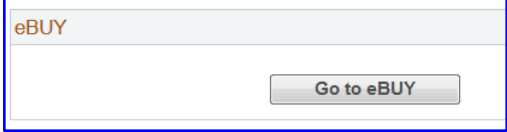
Access to eBuy is through the Laboratory's Financial Management System.

There are several ways to access eBuy:

<p>From the Lab's Home Page: <a href="#">A - Z Index</a></p>	<p>Select "E" from the A - Z Index header.</p>  <p>Click the eBuy link.</p> 
<p>From the Procurement and Property website</p>	<p><a href="http://procurement.lbl.gov">http://procurement.lbl.gov</a></p> <p>Click the <b>Go to eBuy</b> link on the right side of the homepage.</p> 

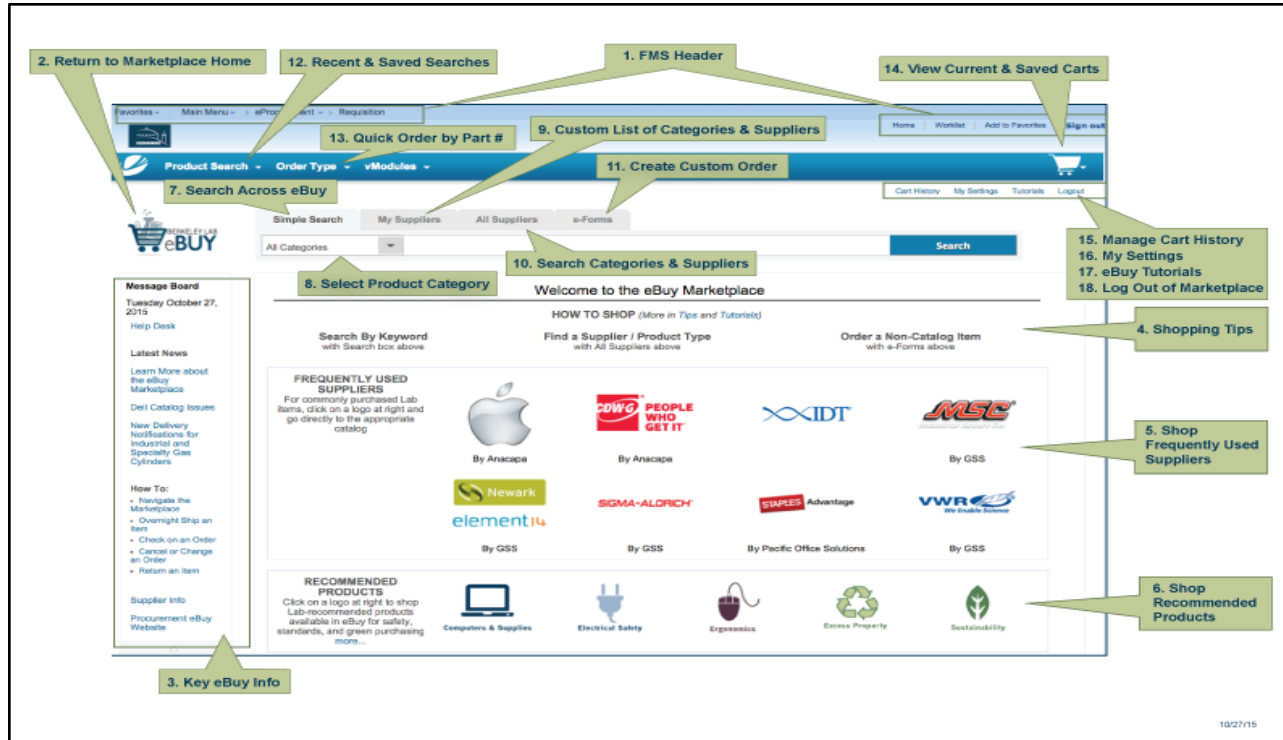


Once you have chosen a route to eBuy, follow the directions below to log in.

Step	Action
1	<p data-bbox="334 310 1214 342">At the login screen, enter your LDAP (email) User ID and Password.</p> <div data-bbox="334 380 954 856"></div>
2	<p data-bbox="334 894 964 926">When the new window opens, click <b>Go to eBuy</b>.</p> <div data-bbox="334 926 837 1056"></div>

## 2.3 Navigating the Marketplace

The Marketplace landing page is shown below. The [Marketplace Navigation Guide](#) provides an overview of the elements noted.



### 3 SHOPPING

In the next few sections, we'll go over how to browse, search, and compare items. We'll also show you how to add items to the shopping cart, as well as how to create an e-Form for special orders.

#### 3.1 Common Ways to Shop


In this first part of the Shopping section, we'll go over the most common ways to shop in the Marketplace—techniques you'll probably find yourself using over and over again.

- Shop Frequently Used Suppliers
- Shop Recommended Products / Packages
- Search Across Suppliers
- Select Specific Categories / Suppliers to Shop and Search
- Build Your Custom Supplier List to Shop and Search

##### 3.1.1 Shop Frequently Used Suppliers

Step	Action
1	On the Marketplace landing page, you can click on a logo in the Frequently Used Suppliers section to shop from suppliers that provide the most commonly purchased items at the Laboratory.

**FREQUENTLY USED SUPPLIERS**  
For commonly purchased Lab items, click on a logo at right and go directly to the appropriate catalog

 by Anacapa	 by Anacapa		 by GSS
 element14 by GSS	 by GSS	 by Pacific Office Solutions	 by GSS

Step	Action
2	You will be redirected to the supplier's catalog within the Marketplace. Here you can shop, add items to your cart, and check out to transfer the items into your Marketplace cart. Note that the Checkout / Transfer Cart process varies by supplier.

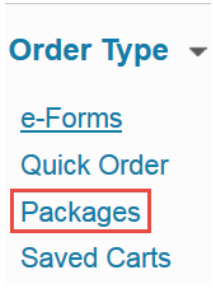
Note: Each supplier catalog has functionality such as search, sort, and compare. However, since each catalog's design is managed by that supplier, the catalogs will look different.



The categories in catalogs will also vary by supplier.

Step	Action
3	To return to the Marketplace without adding anything to your cart, click on <b>Return to eBuy Marketplace</b> at the top of any supplier's catalog.

### 3.1.2 Shop From Recommended Products / Packages

Step	Action	
1	<p>On the Marketplace landing page, you can click on the icons in the Recommended Products section for lists of Lab-recommended products in specific categories.</p> <p>These lists can also be accessed from the Order Type drop-down menu in the Marketplace header, under Packages.</p>	

Click on Recommended Products icons on the Marketplace main page.

Or choose “Packages” from the Order Type drop-down menu to go to a page with a list of product categories. Clicking on a category takes you to the Recommended Products in that category.

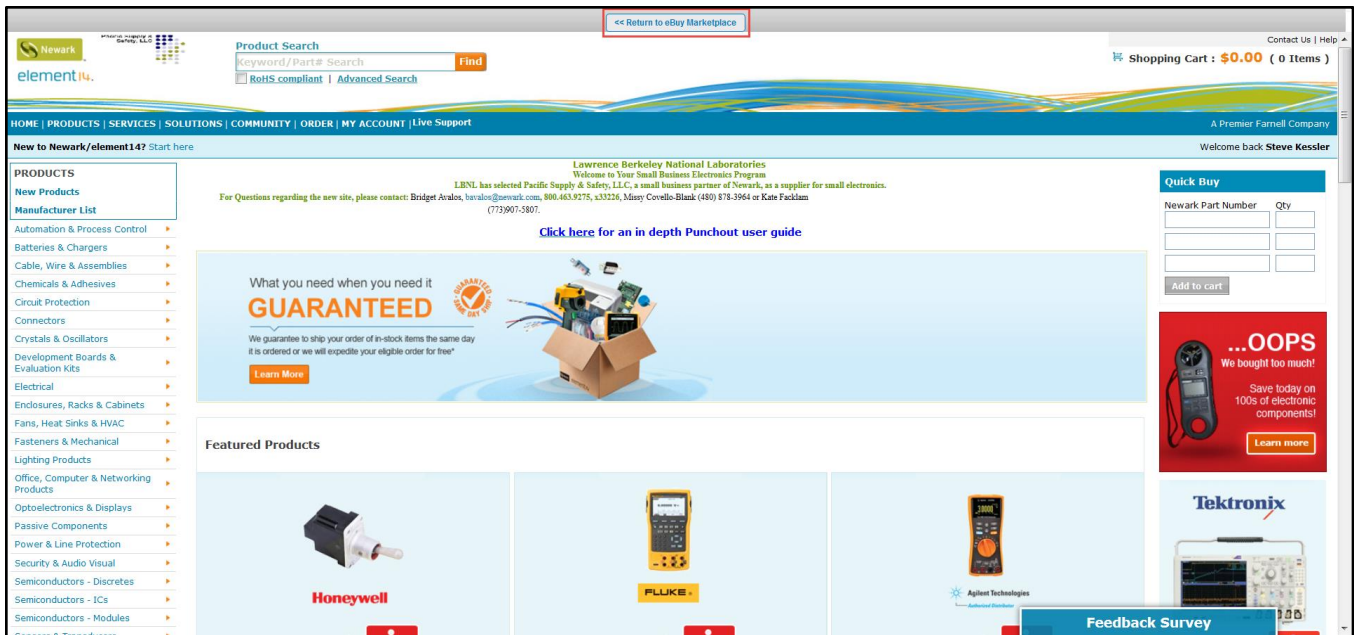
**Package List**

Click on the Package name to view its contents.

Line	Package Name	Package Owner	Creation Date	Package Description	Action
1	<a href="#">Computers &amp; Supplies</a>	jjouie@lbl.gov	05-27-2015	Recommended items by IT SME	
2	<a href="#">Electrical Safety</a>	jjouie@lbl.gov	05-22-2015	Recommended items by EH&S Electrical Safety Department	
3	<a href="#">Ergonomics</a>	jjouie@lbl.gov	08-05-2015	Recommended items by EH&S Ergonomics SMEs	
4	<a href="#">Excess Property</a>	jjouie@lbl.gov	07-15-2015	Subject to availability. Please visit the Laboratory Excess, Bldg 79, M-F 7AM – 3PM, Ph: x4938 or x4937	
5	<a href="#">Sustainability</a>	jjouie@lbl.gov	05-19-2015	Recommended items by Procurement Sustainability SME	
6	<a href="#">Vending Machine</a>	jjouie@lbl.gov	05-27-2015	Items available in the Facilities Vending Machine	

Note: Products displayed under Excess Property are subject to availability and may vary by model, color, and condition. *These products cannot be added your cart.* Instead, click on the product image for a description and contact information to confirm its availability.











Step	Action
2	<p>A page will be displayed listing all Lab-recommended products in that category.</p> <p>You can browse and search through the list of products:</p> <ul style="list-style-type: none"> <li>• Browse using the right-hand scroll bar, or</li> <li>• Perform a keyword search using Ctrl / CMD + F.</li> </ul>

[Add Selected Item\(s\) to Cart](#)
[Add All Item\(s\) to Cart](#)
[Export to Excel](#)

**Package**  
 Package > Computers & Supplies









Select	Product Image	Description	Supplier Name	Part Number	Price	Unit	Qty	Total
<input type="checkbox"/>		Mini DisplayPort to DVI Adapter	Apple by Anacapa 	MB570LL/B	\$31.50	EA	1	\$31.50
<input type="checkbox"/>		IPAD AIR 2 WL 64GB GOLD	Apple by Anacapa 	MH182LL/A	\$571.76	EA	1	\$571.76
<input type="checkbox"/>		IPAD AIR 2 CELLULAR 64GB GRAY WITH WL	Apple by Anacapa 	MH2M2LL/A	\$694.00	EA	1	\$694.00

Step	Action
3	<p>If you use Ctrl / CMD + F, a search field will display to enter the word(s) you wish to search for within the product description. Enter text in the field and hit return on your keyboard.</p> <div data-bbox="240 1755 1279 1829" style="border: 1px solid black; padding: 5px;"> <input type="text" value="Find in page"/> <span>^</span> <span>v</span> <span>Highlight All</span> <span>Match Case</span> </div>

4


Each found case will be highlighted. To continue to see other matches, click the **down arrow** next to the search field.

Note: If you click on a product image, a pop-up window will give you product details on that item.

<input type="checkbox"/>		Staples 100% Recycled <b>Copy Paper</b> , LETTER-size, 92/104 US/Euro Brightness, 20 lb., 8 1/2"H x 11"W, 5,000 Sheets/CT	Staples by Pacific Office Solutions 	620014	\$56.50	CT	1	\$56.50
<input type="checkbox"/>		Staples 100% Recycled Copy Paper, LETTER-size, 92/104 US/Euro Brightness, 20 lb., 8 1/2"H x 11"W, 500 Sheets/Rm	Staples by Pacific Office Solutions 	620016	\$5.93	RM	1	\$5.93
<input type="checkbox"/>		Pilot BeGreen Precise V5 Rolling Ball Pens, Extra Fine Point, 0.5 mm, Blue Ink / Blue and Green Barrel, 12/Pk	Staples by Pacific Office Solutions 	752375	\$23.85	DZ	1	\$23.85
<input type="checkbox"/>		Sustainable Earth by Staples Hardwound Towels, 1-Ply, White, 6'/Ct, 7.87" x 800' per roll	Staples by Pacific Office Solutions 	887841	\$30.86	CT	1	\$30.86

copy paper | Highlight All Match Case 1 of 2 matches

Step	Action
5	You can add one or more items directly to your cart by clicking the checkbox to the left of each item you wish to add.

<input checked="" type="checkbox"/>		Staples 100% Recycled <b>Copy Paper</b> , LETTER-size, 92/104 US/Euro Brightness, 20 lb., 8 1/2"H x 11"W, 500 Sheets/Rm	Staples by Pacific Office Solutions	620016	\$5.93	RM	1	\$5.93
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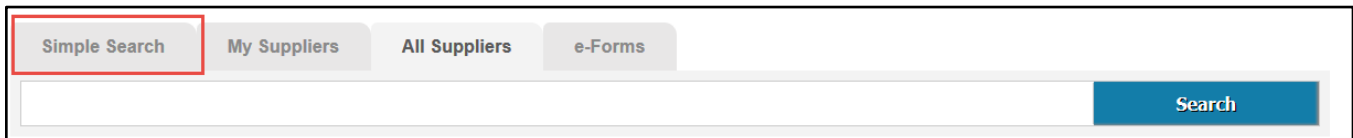
Step	Action
6	<p>Then scroll up to the top of the page, where you will be provided with three choices:</p> <ol style="list-style-type: none"> <li>1. Add Selected Item(s) to Cart</li> <li>2. Add All Item(s) to Cart</li> <li>3. Export to Excel</li> </ol> <p>To add the checked item(s) to the shopping cart, click <b>Add Selected Item(s) to Cart</b>.</p>



### 3.1.3 Search Across Suppliers

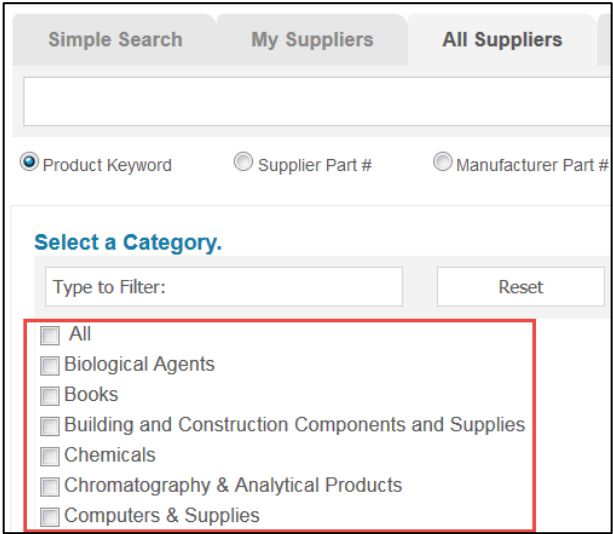
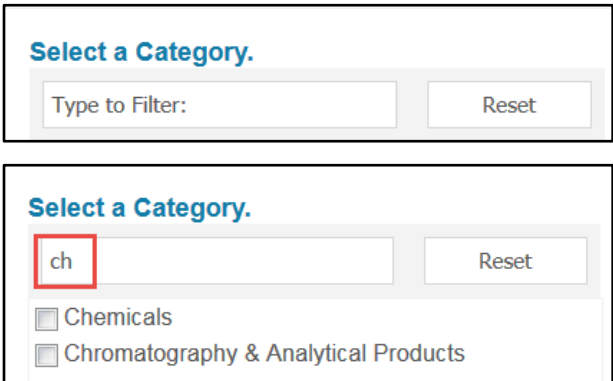
The Simple Search functionality allows you to enter any type of search value (i.e., keyword, supplier part number, manufacturer part number) in order to search across all relevant suppliers/catalogs and display search results.

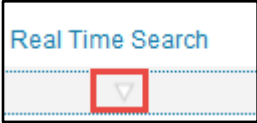


Step	Action
1	Navigate to the <b>Simple Search</b> tab.



Step	Action
2	Type words(s) or part number(s) into the search box.

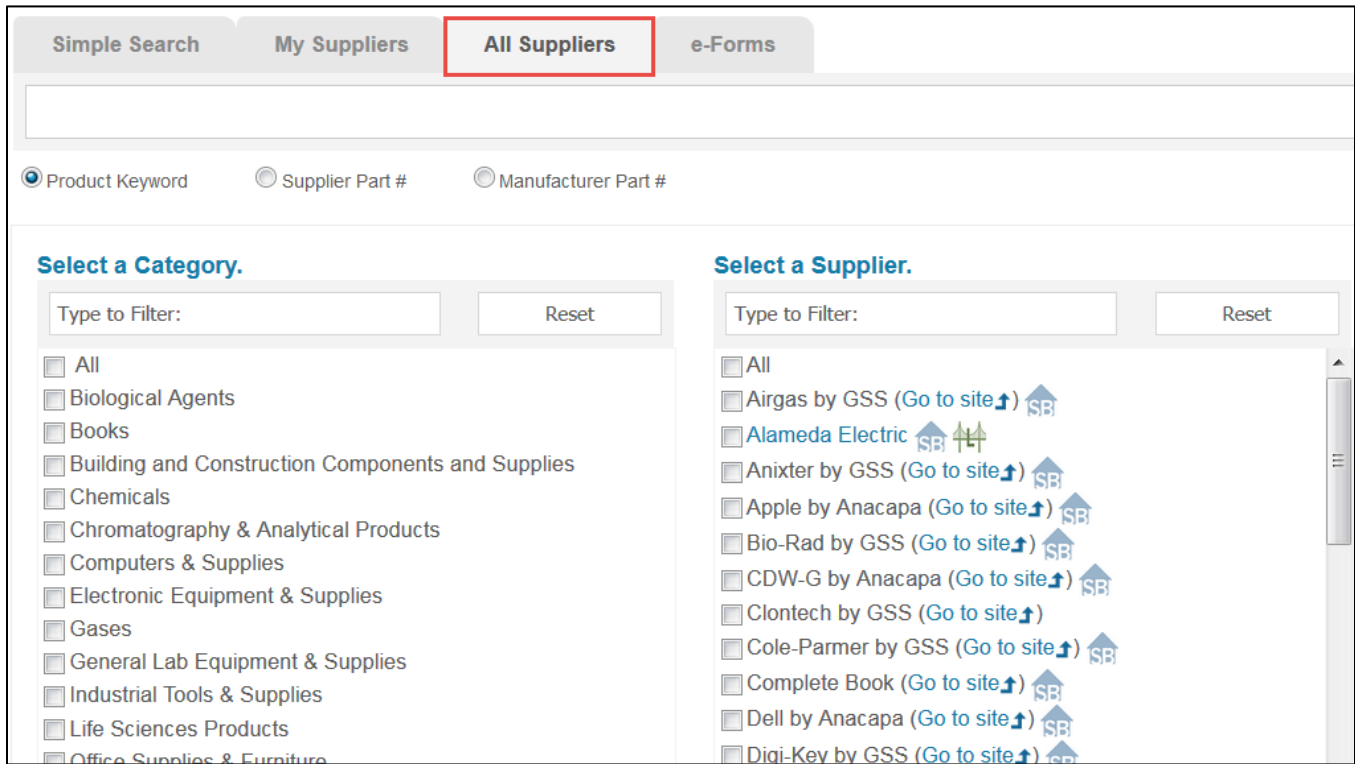


Step	Action
2.a	The search conducts an exact match to the keyword(s) or part number(s) you type into the search box. Searching for “copy paper,” for example, will return any item which has “copy paper” in the item name. Click <a href="#">here</a> for Search Tips.
2.b	The system will auto-populate previously used search terms as you type.
2.c	The system will automatically show search results after three seconds if you stop entering a word after three letters.
3	<p>If known, select a category from the All Categories drop-down menu before doing your search. This will improve the accuracy of your search results.</p>  <p>The screenshot shows the search interface with tabs for 'Simple Search', 'My Suppliers', and 'All Suppliers'. Below the search box are radio buttons for 'Product Keyword' (selected), 'Supplier Part #', and 'Manufacturer Part #'. A 'Select a Category.' section contains a 'Type to Filter:' input field and a 'Reset' button. A list of categories is shown below, with 'All' highlighted by a red box. Other categories include Biological Agents, Books, Building and Construction Components and Supplies, Chemicals, Chromatography &amp; Analytical Products, and Computers &amp; Supplies.</p>
4	<p>You can also type in the category name in the <b>Type to Filter</b> area. As you type the letters in, matching categories will display.</p>  <p>The top screenshot shows the 'Select a Category.' section with the 'Type to Filter:' input field highlighted by a red box. The bottom screenshot shows the same section with 'ch' typed into the input field, and the 'Chemicals' and 'Chromatography &amp; Analytical Products' categories highlighted by red boxes.</p>

Step	Action	
5	<p>Located on the left-hand side of the Search Results window is a Real Time Search box. You can open this box by clicking the down arrow.</p>	
5.a	<p>Here you will see the search status for each supplier.</p> <p>When a supplier has a status wheel which continues to twirl, the supplier search is still in progress.</p> <p>To stop the search for a particular supplier, click on the <b>blue x</b> next to the supplier's status wheel. The wheel will stop and be replaced by a red square.</p> <p>To restart the search, click on the arrow to the right of the red box.</p>	
5.b	<p>When a supplier has a green checkmark next to it, the supplier search is completed.</p>	

### 3.1.4 Select Specific Categories / Suppliers to Shop and Search

Within the All Suppliers tab, you can select a supplier and shop directly from their catalog, or you can select specific categories and suppliers to search.



#### 3.1.4.1 Catalog Shopping From the All Suppliers Tab

Step	Action
1	Navigate to the <b>All Suppliers</b> tab.
2	<p>If there is a checkbox to the left of the supplier's name, you can search the supplier's products in the Marketplace (e.g., Grainger by GSS).</p> <p>The blue Go to site link to the right of a supplier's name indicates that you can go directly to that supplier's catalog to shop and add items to your cart.</p> <p>If there is no checkbox to the left of the supplier's name, you cannot search this supplier's catalog within the Marketplace. Such suppliers will have a blue Go to site link to the right of their name (e.g., Genewiz by GSS).</p>

**Select a Supplier.**

Type to Filter:

- Genewiz by GSS (Go to site  )
- GenScript (Go to site  )
- Government Scientific Source (Go to site  )
- Grainger by GSS (Go to site 

Step	Action
3	<p>If you are uncertain which suppliers have the category of product you are looking for, first choose a category under the heading Select a Category. This will narrow your selection of suppliers.</p> <p>Click the <b>Go to site</b> link to the right of the supplier's name.</p> <p>You will be directed to the supplier's catalog within the Marketplace.</p>










**Select a Category.**

Type to Filter:


- All
- Biological Agents
- Books
- Building and Construction Components and Supplies
- Chemicals
- Chromatography & Analytical Products
- Computers & Supplies
- Electronic Equipment & Supplies
- Gases
- General Lab Equipment & Supplies
- Industrial Tools & Supplies
- Life Sciences Products
- Office Supplies & Furniture
- Optics & Spectroscopy Products
- Safety Equipment
- Vacuum Supplies

**Select a Supplier.**

Type to Filter:

- All
- Apple by Anacapa (Go to site  )
- CDW-G by Anacapa (Go to site  )
- Dell by Anacapa (Go to site  )
- Excess Inventory
- Fine Tec Computer   

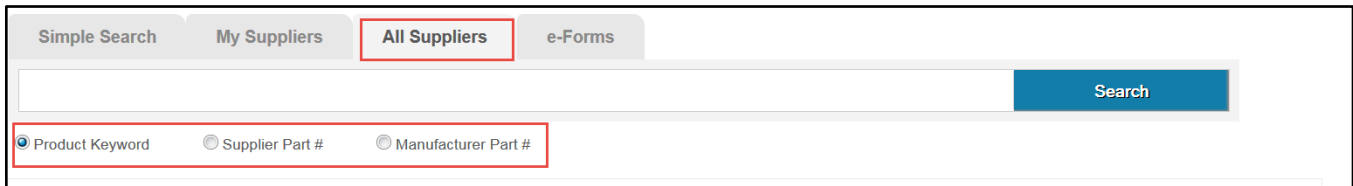
**Note:** Each supplier catalog has functionality such as search, sort, and compare. However, since each catalog's design is managed by that supplier, the catalogs will look different. The categories in catalogs will also vary by supplier.



### 3.1.4.2 Searching Multiple Categories or Suppliers on the All Suppliers Tab

The All Suppliers search function allows you to perform a search across selected categories and suppliers. You can select one or more categories and/or suppliers to search.

Step	Action
1	Navigate to the <b>All Suppliers</b> tab.
2	Select a button below the All Suppliers search box: either Product Keyword, Supplier Part #, or Manufacturer Part #.  <u>Product Keyword</u> Searches for product(s) based on a keyword.  <u>Supplier Part #</u> Searches for product(s) based on the part number provided by the supplier.  <u>Manufacturer Part #</u> Searches for product(s) based on the part number provided by the manufacturer.



Step	Action
3	If you do not know the supplier catalog(s) you wish to search, but <i>do</i> know the product category, you can narrow your search to only suppliers offering products in that category.  Choose the desired item categories(s) from the Select a Category box by clicking on the checkbox associated with each category name or by entering the name of the category in the Type to Filter field, or leave it blank. Only supplier(s) associated with the chosen category will populate in the Select a Supplier section.  Note: You can select all categories by clicking on the <b>All</b> checkbox.

Simple Search My Suppliers All Suppliers e-Forms

Search

Product Keyword Supplier Part # Manufacturer Part #

**Select a Category.**

Type to Filter:  Reset

- All
- Biological Agents
- Books
- Building and Construction Components and Supplies
- Chemicals
- Chromatography & Analytical Products
- Computers & Supplies
- Electronic Equipment & Supplies
- Gases
- General Lab Equipment & Supplies
- Industrial Tools & Supplies
- Life Sciences Products
- Office Supplies & Furniture
- Optics & Spectroscopy Products
- Safety Equipment
- Vacuum Supplies

**Select a Supplier.**

Type to Filter:  Reset

- All
- Fisher Scientific by GSS ([Go to site](#))
- Grainger by GSS ([Go to site](#))
- MSC by GSS ([Go to site](#))
- Newark element 14 by GSS ([Go to site](#))
- S&S Supplies & Solutions ([Go to site](#))

**Search Within** Remove All

Step	Action
4	<p>Select the supplier catalogs that you wish to search within from the Select a Supplier list. At least one supplier must be chosen to conduct a search with this search feature.</p> <p>Note: You can select all suppliers by clicking on the All checkbox.</p>

Simple Search My Suppliers All Suppliers e-Forms

Search

Product Keyword Supplier Part # Manufacturer Part #

**Select a Category.**

Type to Filter:  Reset

- All
- Biological Agents
- Books
- Building and Construction Components and Supplies
- Chemicals
- Chromatography & Analytical Products
- Computers & Supplies
- Electronic Equipment & Supplies
- Gases
- General Lab Equipment & Supplies
- Industrial Tools & Supplies
- Life Sciences Products
- Office Supplies & Furniture
- Optics & Spectroscopy Products
- Safety Equipment
- Vacuum Supplies

**Select a Supplier.**

Type to Filter:  Reset

- All
- Fisher Scientific by GSS ([Go to site](#))
- Grainger by GSS ([Go to site](#))
- MSC by GSS ([Go to site](#))
- Newark element 14 by GSS ([Go to site](#))
- S&S Supplies & Solutions ([Go to site](#))

**Search Within** Remove All

- Grainger by GSS ([Go to site](#)) ✕
- Newark element 14 by GSS ([Go to site](#)) ✕

Step	Action
5	Type word(s) or part number(s) in the search box. Click <a href="#">here</a> for Search Tips.
6	Click the Search button.

Step	Action
7	The search results will appear under the Simple Search tab.

Step	Action
8	To edit your search criteria, you will need to return to the All Suppliers tab.





### 3.1.5 Build Your Custom Supplier List to Shop and Search

Within the My Suppliers tab, you can create your own custom list of categories and suppliers. You can also select a supplier and shop directly from their catalog, or you can select specific categories and suppliers to search.

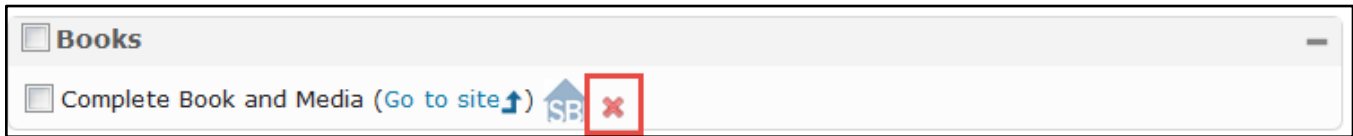
#### 3.1.5.1 Edit the Supplier List

Step	Action
1	Navigate to the <b>My Suppliers</b> tab.
2	Click the <b>Edit List</b> button.

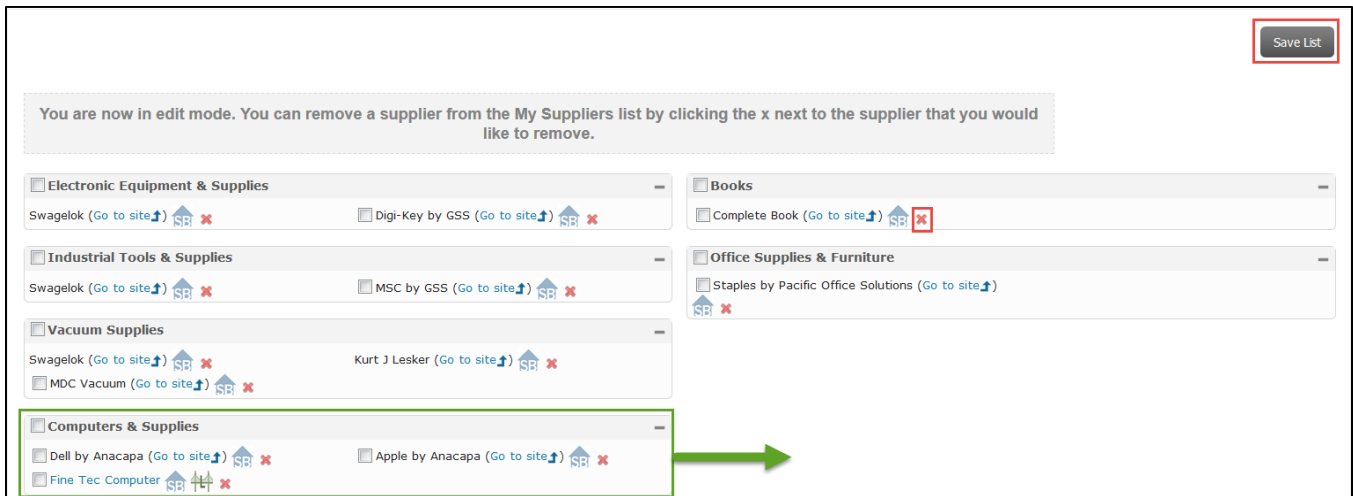
The screenshot shows the 'My Suppliers' tab in a web application. At the top, there are navigation tabs: 'Simple Search', 'My Suppliers' (selected), 'All Suppliers', and 'e-Forms'. Below the tabs is a search bar with a 'Search' button. Underneath the search bar are radio buttons for 'Product Keyword' (selected), 'Supplier Part #', and 'Manufacturer Part #'. On the right side of the main content area, there are two buttons: 'Reset Portlets' and 'Edit List' (highlighted with a red box). The main content area displays a grid of supplier categories and their associated suppliers. Each category has a minus sign on the right to collapse it. The categories and their suppliers are:

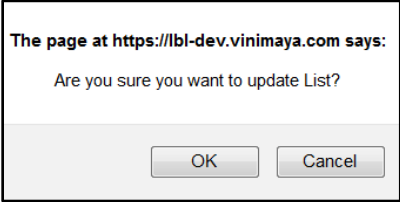
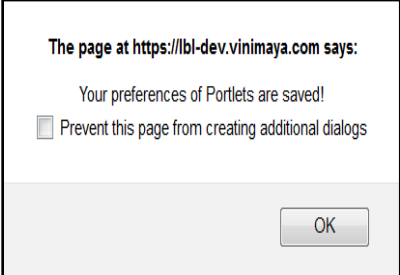
- Electronic Equipment & Supplies**: Swagelok, Digi-Key by GSS
- Books**: Complete Book
- Industrial Tools & Supplies**: Swagelok, MSC by GSS
- Office Supplies & Furniture**: Staples by Pacific Office Solutions
- Vacuum Supplies**: Swagelok, MDC Vacuum, Kurt J Lesker
- Computers & Supplies**: Dell by Anacapa, Apple by Anacapa, Fine Tec Computer

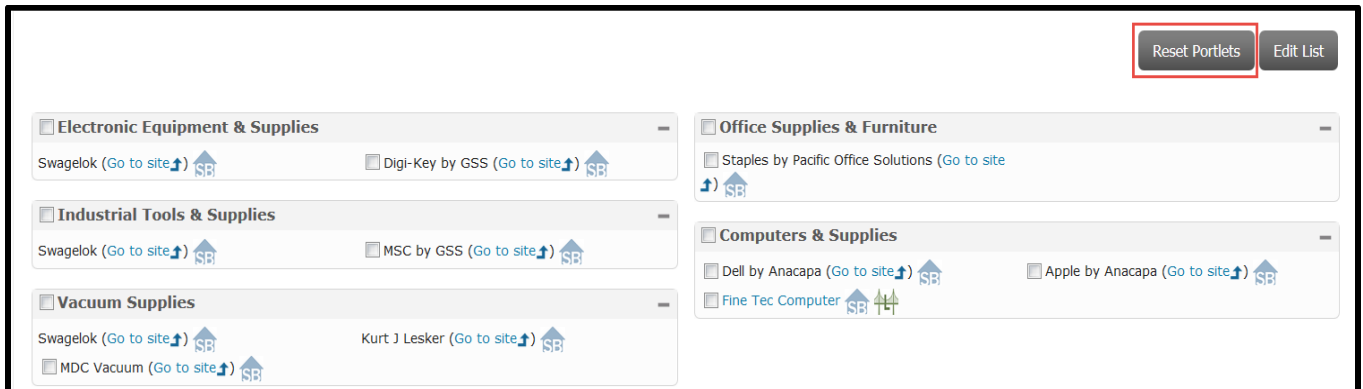
Step	Action
3	You will now be in edit mode.
4	Click the <b>red x</b> next to the supplier that you would like to remove from the page, or drag and drop the category to rearrange the view location within the My Suppliers tab.



Step	Action
5	Click the <b>Save List</b> button at the top right of the window.



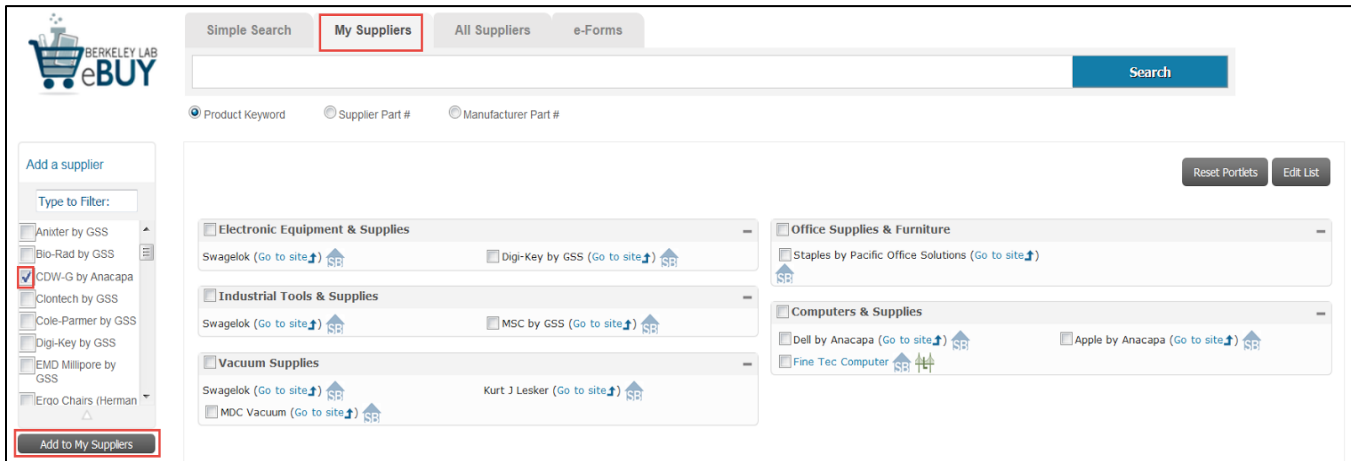
Step	Action	
6	A message confirming that you want to update the list displays. Click <b>OK</b> to confirm the changes.	
7	When you click <b>OK</b> , a message confirming the update is displayed. Click <b>OK</b> to proceed.	
8	If you wish to reset the page back to the default view, click <b>Reset Portlets</b> .	



### 3.1.5.2 Add Suppliers

Step	Action
1	Navigate to the <b>My Suppliers</b> tab.

Step	Action
2	In the Add a Supplier section on the left-hand side of the My Suppliers tab, select the desired supplier(s) name by clicking the checkbox to the left of the supplier name.
3	Click <b>Add to My Suppliers</b> to add the selected supplier(s) to the list tab.



### 3.1.5.3 Catalog Shopping from My Suppliers Tab

Within the My Suppliers tab, you can select a supplier and shop directly from their catalog.

Step	Action
1	Navigate to the <b>My Suppliers</b> tab.
2	<p>The blue Go to site link to the right of the supplier's name indicates that you can go directly to that supplier's catalog to shop and add items to the cart.</p> <p>If there is no Go to site link, you can <u>only</u> search the supplier's products in the Marketplace (e.g., FineTec Computer).</p> <p>Click the <b>Go to site</b> link.</p>

Simple Search **My Suppliers** All Suppliers e-Forms

Search

Product Keyword Supplier Part # Manufacturer Part #

Reset Portlets Edit List

Electronic Equipment & Supplies  
 Swagelok (Go to site) CDW-G by Anacapa (Go to site)  
 Digi-Key by GSS (Go to site)

Industrial Tools & Supplies  
 Swagelok (Go to site) MSC by GSS (Go to site)

Vacuum Supplies  
 Kurt J Lesker (Go to site) Swagelok (Go to site)  
 MDC Vacuum (Go to site)


Office Supplies & Furniture  
 Staples by Pacific Office Solutions (Go to site)

Computers & Supplies  
 Fine Tec Computer CDW-G by Anacapa (Go to site)  
 Dell by Anacapa (Go to site) Apple by Anacapa (Go to site)

Chromatography & Analytical Products  
 Swagelok (Go to site)

Safety Equipment  
 MSC by GSS (Go to site)

Note: Each supplier catalog has functionality such as search, sort, and compare. However, since each catalog’s design is managed by that supplier, the catalogs will look different. The categories in catalogs will also vary by supplier.



### 3.1.5.4 Searching from My Suppliers Tab

Within the My Suppliers tab you can perform a product search across the list of categories and suppliers customized by you. The search can be performed by specifying a search-type criteria (i.e., Product Key Word, Supplier Part #, or Manufacturer Part #). On this page, you can set up your search criteria to display specific suppliers for future searches.



Step	Action
1	Navigate to the <b>My Suppliers</b> tab.
2	Select a button below the search field, either Product Keyword, Supplier Part #, or Manufacturer Part #.  <u>Product Keyword</u> Searches for product(s) based on a keyword.  <u>Supplier Part #</u> Searches for product(s) based on the part number provided by the supplier.  <u>Manufacturer Part #</u> Searches for product(s) based on the part number provided by the manufacture

Simple Search **My Suppliers** All Suppliers e-Forms





Product Keyword  Supplier Part #  Manufacturer Part #



Step	Action
3	Filter your search by selecting the category(s) and/or supplier(s) you wish to search.

**Books** -


Complete Book and Media (Go to site  

**Computers & Supplies** -

Dell by Anacapa (Go to site    FineTec Computer  

Apple by Anacapa (Go to site  

**Gases** -

Praxair by GSS (Go to site 

Step	Action
4	Type word(s) or part number(s) in the search box. Click <a href="#">here</a> for Search Tips.
5	Click the <b>Search</b> button.

Simple Search **My Suppliers** All Suppliers e-Forms

Product Keyword  Supplier Part #  Manufacturer Part #

Search

Step	Action
6	The search results will appear under the Simple Search tab.
7	To edit your search criteria, you will need to return to the My Suppliers tab.

The screenshot shows the 'Simple Search' tab selected. The search criteria is 'strengths based leadership'. The results table has columns for Product, Price, and Add To Cart. Two results are shown, both for 'Strengths Based Leadership' at prices of \$14.84 and \$14.88. Each result includes a 'Quantity' input field and an 'Add to Cart' button. The page also features a 'Compare' button, 'Refresh this Data', 'Hide Product Images', 'Add to Cart', 'Save Search Criteria', and 'Export' buttons. The pagination shows 'Showing 1 - 2 of 2 | 20 per page | 1'.

## 3.2 Manage Your Search Results

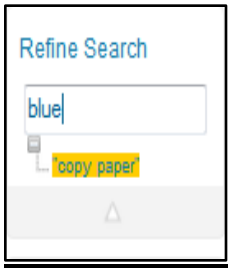

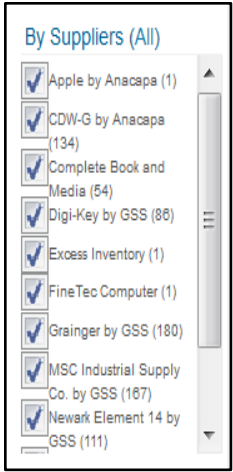
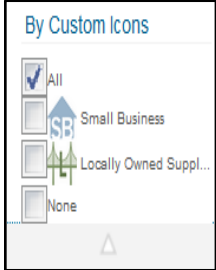
You can manage your search results in several ways: You can refine them, sort them, save them, and export them.

### 3.2.1 Refine Search Results

When performing a search for a product, the search results may be extensive and you may not easily locate the product you're looking for. In order to reduce the number of search results, you can refine and narrow down the results based on certain item attributes, such as:

- Search terms
- Price
- Suppliers
- Custom icons (Small Business or Local Business)


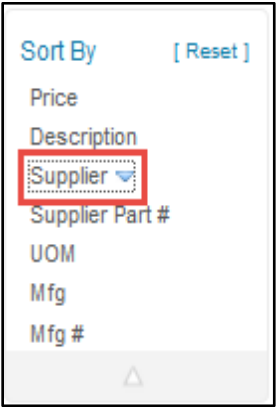
The fields described below are located on the left-hand side of the Search Results window.


Step	Action	
1	<p>To narrow down the results, refine your search by using Refine Search and adding an additional search term.</p> <p>Note: If the search results are still too broad, repeat the previous step.</p>	
2	<p>The search can be narrowed by price.</p> <ul style="list-style-type: none"> <li>• Drag the price-slider in the Narrow Results section to define a new minimum and maximum price range for the item.</li> </ul> <p><u>OR</u></p> <ul style="list-style-type: none"> <li>• Enter the desired minimum and/or maximum price range in the text box below the price-slider.</li> </ul>	
3	<p>The search can be narrowed by supplier(s).</p> <p>Select or deselect the desired suppliers by checking or unchecking the box to the left of the supplier name.</p>	
4	<p>The search can be narrowed by Small Business or Locally Owned Supplier(s).</p> <p>Select or deselect the category by checking or unchecking the box to the left of the category.</p>	



### 3.2.2 Sort Search Results

Sorting your search results helps you view the information quickly and efficiently. Search results can be sorted in ascending or descending order.

Step	Action	
1	<p>To sort the search result, go to the Sort By options on the left-hand side, which include the following:</p> <ul style="list-style-type: none"> <li>● Price</li> <li>● Description</li> <li>● Supplier</li> <li>● Supplier Part #</li> <li>● Unit of Measure (UOM)</li> <li>● Manufacturer</li> <li>● Manufacturer #</li> </ul> <p>Click on an option, and your search results will be re-sorted by that option.</p>	
2	<p>To switch between ascending and descending sort order, click on the <b>Sort Order</b> arrow displayed next to your selected sort option.</p> <p>Note: The default setting is ascending order.</p>	

Note: To reset the catalog content, click on the Refresh this Data link, located at the top right-hand side of the window. 

Simple Search My Suppliers All Suppliers e-Forms

All Categories  Search

Real Time Search  Compare

Refresh this Data  
Hide Product Images

Add to Cart Save Search Criteria Export

Showing 1 - 20 of 192 | 20 per page | 1 2 3 4 5 ... Next

Product	Price	Add To Cart
<p><b>PAND PLY1M-M0 LOCKING TIE BULK-PK CABLE TIR 4" LONG BLACK NYLON 6/6 UV STABLE</b>            Supplier: Alameda Electric Supplier Part #: 158853 UOM: EA Mfg: PAND Mfg #: PLY1M-M0 Supplier AuxID: LeadTime: Buyer Part#: MinOrderQuantity: 1 UNSPSC:            PAND PLY1M-M0 LOCKING TIE BULK-PK CABLE TIR 4" LONG BLACK NYLON 6/6 UV STABLE            Alternate Supplier(s)</p>	\$0.04	Quantity <input type="text"/> Add to Cart
<p><b>PAND PLY2S-M0 LOCKING TIE BULK</b>            Supplier: Alameda Electric Supplier Part #: 36353 UOM: EA Mfg: PAND Mfg #: PLY2S-M0 Supplier AuxID: LeadTime: Buyer Part#: MinOrderQuantity: 1 UNSPSC:            PAND PLY2S-M0 LOCKING TIE BULK            Alternate Supplier(s)</p>	\$0.06	Quantity <input type="text"/> Add to Cart

### 3.2.3 Save Search Criteria

You can save your search criteria for re-use later.

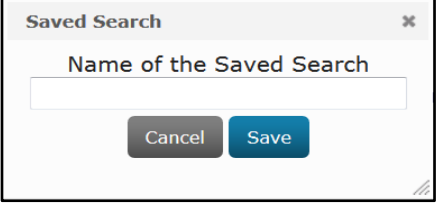
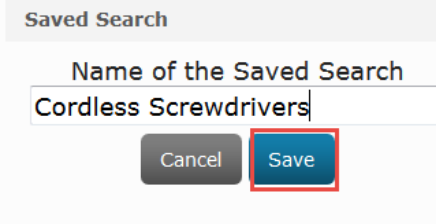
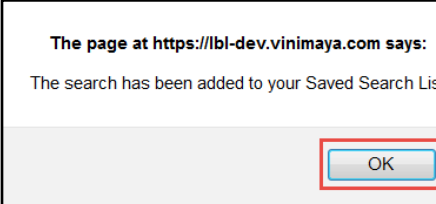

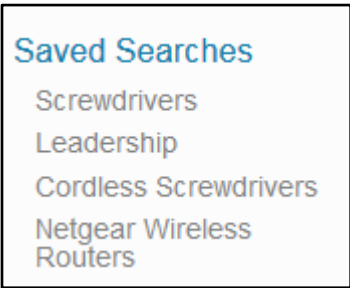
Step	Action
1	Perform a search. The Search Results page is displayed. Click on <b>Save Search Criteria</b> to save the search criteria.

Refresh this Data  
Hide Product Images

Add to Cart **Save Search Criteria** Export

Showing 1 - 20 of 33 | 20 per page | 1 2

Product	Price	Add To Cart
<p><b>CORDLESS SCREWDRIVER</b>            Supplier: Newark element 14 by GSS Supplier Part #: 47Y4605 UOM: EA Mfg: BLACK &amp; DECKER Mfg #: BDCS20C Supplier AuxID: LeadTime: Buyer Part#: MinOrderQuantity: 1 UNSPSC:            Alternate Supplier(s)</p>	\$17.99	Quantity <input type="text"/> Add to Cart
<p><b>CORDLESS SCREWDRIVER</b>            Supplier: Newark element 14 by GSS Supplier Part #: 42X1916 UOM: EA Mfg: GENERAL TOOLS Mfg #: 500 Supplier AuxID: LeadTime: Buyer Part#: MinOrderQuantity: 1 UNSPSC:            Alternate Supplier(s)</p>	\$21.59	Quantity <input type="text"/> Add to Cart
<p><b>Cordless Screwdriver Kit, 3.6V</b>            Supplier: Grainger by GSS Supplier Part #: 40F272 UOM: EA Mfg: BLACK &amp; DECKER Mfg #: L12000 Supplier AuxID: LeadTime: Buyer Part#: MinOrderQuantity: 1 UNSPSC: 27112710            ItemCordless Screwdriver KitBattery Included / Bare ToolBattery IncludedVoltage3.6Chuck Size1"No... read more            Alternate Supplier(s)</p>	\$10.39	Quantity <input type="text"/> Add to Cart

Step	Action	
2	The Saved Search dialog box is displayed.	
3	Enter a name for your search in the <b>Name of Saved Search</b> field.  Click <b>Save</b> to save the search criteria, or <b>Cancel</b> .	
4	If you click <b>Save</b> , a confirmation window will display. Click <b>OK</b> to proceed.	
5	To access the saved search criteria, view Recent and Saved Searches from the Product Search drop-down menu.  	

Note: Any refinement that you make to search criteria (see Section 3.2.1, [Refine Search Results](#)) (e.g., additional search terms, price, etc.) will not be included in the Saved Search.



### 3.2.4 Export Search Results

The search results can be exported to a Microsoft Excel file for future reference. You can export:

- All rows of the search result
- The current page of the search result

Step	Action
1	Perform the desired search.
2	Click <b>Export</b> at the top right of the page to export the search results.

Refresh this Data  
Hide Product Images

Compare

Add to Cart Save Search Criteria **Export**

Showing 1 - 20 of 34 | 20 per page | 1 2

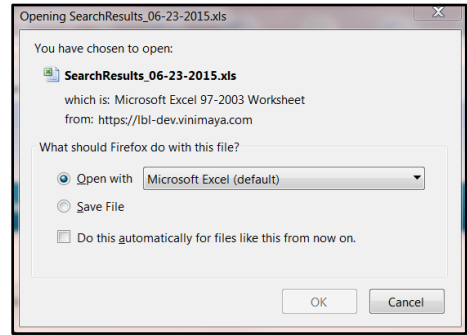
Product	Price	Add To Cart
<input type="checkbox"/> No Image <b>CORDLESS SCREWDRIVER</b> Supplier: Newark element 14 by GSS Supplier Part #: 47Y4605 UOM: EA Mfg: BLACK & DECKER Mfg #: BDCS20C Supplier AuxID: LeadTime: Buyer Part#: MinOrderQuantity: 1 UNSPSC: Alternate Supplier(s)	\$17.99	Quantity <input type="text"/> <b>Add to Cart</b>
<input type="checkbox"/> No Image <b>CORDLESS SCREWDRIVER</b> Supplier: Newark element 14 by GSS Supplier Part #: 42X1916 UOM: EA Mfg: GENERAL TOOLS Mfg #: 500 Supplier AuxID: LeadTime: Buyer Part#: MinOrderQuantity: 1 UNSPSC: Alternate Supplier(s)	\$21.59	Quantity <input type="text"/> <b>Add to Cart</b>
<input type="checkbox"/> <b>Cordless Screwdriver Kit, 3.6V</b> Supplier: Grainger by GSS Supplier Part #: 40F272 UOM: EA Mfg: BLACK & DECKER Mfg #: L12000 Supplier AuxID: LeadTime: Buyer Part#: MinOrderQuantity: 1 UNSPSC: 27112710 Alternate Supplier(s)	\$10.39	Quantity <input type="text"/> <b>Add to Cart</b>

Step	Action
3	<p>A dialog box displays with two options:</p> <ul style="list-style-type: none"> <li>• Export All Rows (export the complete search result)</li> <li>• Export Current Page (export only the current search result page)</li> </ul> <p>Click on one of the options.</p>

Export to Excel ✕

Export All Rows  
 Export Current Page

Step	Action
4	<ul style="list-style-type: none"> <li>● Click <b>Save File</b> to save the search results in an Excel file.</li> </ul> <p><u>OR</u></p> <ul style="list-style-type: none"> <li>● Click <b>Open</b> to view the search result file.</li> </ul> <p><u>OR</u></p> <ul style="list-style-type: none"> <li>● Click <b>Cancel</b> to cancel the operation.</li> </ul>








### 3.3 Compare Products

Once you have performed a search, you can choose two to five products at a time to compare. This helps in deciding the exact item you wish to purchase.

Step	Action
1	<p>From the search results page, there are two ways to select the items you wish to compare:</p> <ul style="list-style-type: none"> <li>● You can check the box beside each item you'd like to compare from the search results, then click <b>Compare</b>.</li> </ul> <p><u>OR</u></p> <ul style="list-style-type: none"> <li>● You can click on the item image displayed in the search result and drag the image to the Compare Section at the top-left corner of the search page.</li> </ul>

[Refresh this Data](#)  
[Hide Product Images](#)

Showing 1 - 18 of 18 | 20 per page | 1


Product	Price	Add To Cart
<input type="checkbox"/>  <p><b>Cordless Screwdriver Kit, 3.6V</b>            Supplier: Grainger by GSS Supplier Part #: 40F272 UOM: EA Mfg: BLACK &amp; DECKER Mfg #: LI2000 Supplier AuxID:            LeadTime: Buyer Part#: MinOrderQuantity: 1 UNSPSC: 27112710  <a href="#">Alternate Supplier(s)</a></p>	\$10.39	Quantity <input type="text"/> <input type="button" value="Add to Cart"/>
<input type="checkbox"/>  <p><b>Cordless Screwdriver Kit, 3.6V, Lithium</b>            Supplier: Grainger by GSS Supplier Part #: 2WCE9 UOM: EA Mfg: WESTWARD Mfg #: 2WCE9 Supplier AuxID:            LeadTime: Buyer Part#: MinOrderQuantity: 1 UNSPSC:  <a href="#">Alternate Supplier(s)</a></p>	\$57.82	Quantity <input type="text"/> <input type="button" value="Add to Cart"/>
<input type="checkbox"/>  <p><b>Cordless Screwdriver Kit, 9-1/2 In. L.</b>            Supplier: Grainger by GSS Supplier Part #: 6RM76 UOM: EA Mfg: DEWALT Mfg #: DW920K-2 Supplier AuxID:            LeadTime: Buyer Part#: MinOrderQuantity: 1 UNSPSC: 27111701  <a href="#">Alternate Supplier(s)</a></p>	\$75.52	Quantity <input type="text"/> <input type="button" value="Add to Cart"/>
<input type="checkbox"/> No Image  <p><b>CORDLESS SCREWDRIVER KIT 7.2V TWO POSITION</b>            Supplier: Newark element 14 by GSS Supplier Part #: 68H8437 UOM: EA Mfg: DEWALT Mfg #: DW920K-2 Supplier AuxID:            LeadTime: Buyer Part#: MinOrderQuantity: 1 UNSPSC:  <a href="#">Alternate Supplier(s)</a></p>	\$89.99	Quantity <input type="text"/> <input type="button" value="Add to Cart"/>
<input type="checkbox"/>  <p><b>Cordless Screwdriver Kit, 3.6 V</b>            Supplier: Grainger by GSS Supplier Part #: 36H232 UOM: EA Mfg: HITACHI Mfg #: DB3DL2 Supplier AuxID: LeadTime: Buyer            Part#: MinOrderQuantity: 1 UNSPSC: 27112710  <a href="#">Alternate Supplier(s)</a></p>	\$96.80	Quantity <input type="text"/> <input type="button" value="Add to Cart"/>

Step	Action
2	<p>You will be directed to the Compare page, where all information available on each item from the supplier is shown.</p> <p>After viewing the Compare page, you can:</p> <ul style="list-style-type: none"> <li>Return to the search results by clicking <b>Go back to search results</b>.</li> <li>Add one or more items to your cart by: <ul style="list-style-type: none"> <li>Clicking <b>Add to Cart</b> in an individual item window(s). Here you can also change the quantity.</li> <li>Selecting an item by clicking in the top-left box, then clicking <b>Add to Cart</b> to add the individual item to your shopping cart.</li> </ul> </li> <li>Remove an item from the Compare Results page by clicking in the top-left box for that item, then click <b>Remove</b>.</li> </ul>

Go back to search results


Remove
Add To Cart

Compare Results




**Cordless Screwdriver Kit, 3.6V**

\$10.39  
Part Number : 40F272  
Manufacturer Part #: LI2000

Supplier: Grainger by GSS   
UOM : EA  
Mfg:BLACK & DECKER  
Product Options:


ItemCordless Screwdriver KitBattery Included / Bare ToolBattery IncludedVoltage3.6Chuck Size1/4"Nomax Load RPM180Max Torque40 in-lb Battery TypeLi-Ion Battery Capacity1.0AhHandle Type(3) PositionsBattery IncludedYesFeaturesLithium Ion Battery Holds A Charge For Up To 18 Months, Three Position Handle Lets You Work In Tight Spaces, Spindle Lock Forward And Reverse

Quantity 1
Add To Cart




**Cordless Screwdriver Kit, 3.6V**

\$96.80  
Part Number : 36H232  
Manufacturer Part #: DB3DL2

Supplier: Grainger by GSS   
UOM : EA  
Mfg:HITACHI  
Product Options:


ItemCordless Screwdriver KitBattery Included / Bare ToolBattery IncludedVoltage3.6Chuck Size1/4"Nomax Load RPM200/600Max Torque44 in-lb Battery TypeLi-IonBattery Capacity1.5AhClutch Style21 StageHandle TypePistolBattery Included(2) 6HFY7Battery Pack Replacement6HFY7Tool Length10.55"Tool Weight0.9 lb Includes(2) 1.5 Ah 3.6V Lithium Ion Batteries, Quick Charger

Quantity 1
Add To Cart



**Cordless Screwdriver Kit, 3.6V, Lithium**

\$57.82  
Part Number : 2WCE9  
Manufacturer Part #: 2WCE9

Supplier: Grainger by GSS   
UOM : EA  
Mfg:WESTWARD  
Product Options:

ItemCordless Screwdriver KitBattery Included / Bare ToolBattery IncludedVoltage3.6Chuck Size1/4"Nomax Load RPM180Max Torque31 in-lb Battery TypeLi-IonBattery Capacity1.3AhClutch StyleClip SpringHandle Type Pistol Grip Soft TouchBattery IncludedIntegralTool Length5 -1/2"Tool Weight0.8 lb IncludesLED Work Light Display, 120 Volt Lithium Ion Battery Charger, 100 Bits, Bit Holder, Wire Insert Twister

Quantity 1
Add To Cart



## 3.4 Other Ways to Shop

### 3.4.1 Using Recent & Saved Searches

In this section, we'll show you how to access searches you've already saved. (For instruction on Saving Search Results, see the previous Section 3.2.3, [Save Search Criteria](#).)

**Note:** Saved Searches can be viewed only by the user who created the search. Saved Carts, which we'll go over in Section 3.4.2.2, [Share Cart](#), can be copied to another user.



Step	Action	
1	<p>Click <b>Product Search</b> in the menu bar.</p> <p>Saved searches are listed under the Saved Searches heading.</p>	
2	<p><b>First option:</b> Click on the name (gray hyperlink) of a saved search to launch and continue shopping.</p> <p><b>Second option:</b> Click on the <b>Saved Searches</b> (blue hyperlink) to view lists of your Recent Searches and Saved Searches.</p>	
3	<p>To launch a Recent Search, click on a search term listed under Recent Searches.</p> <p>To launch a Saved Search, click on the <b>blue arrow</b> icon next to its name. If you click on the name of the Saved Search, you will will get a pop-up window that displays the search criteria.</p> <p>When your Search Results are returned, you can continue shopping.</p>	



Simple Search | My Suppliers | All Suppliers | e-Forms

All Categories [v] Search

**Recent Searches**

Jul 16, 2015  
"cordless drill" [👉]  
"c" [👉]  
"copy paper" [👉]  
\* [👉]  
Jul 15, 2015  
"strengths based leadership" [👉]  
\* [👉]  
\* [👉]  
Jul 14, 2015  
Notebook Lock [👉]  
Notebook Lock [👉]

**Saved Searches**

Computer Tool Kits [X] [➡] [red box]  
Cordless Screwdriver Kits [X] [➡]  
Colored Copy Paper [X] [➡]  
Wireless Routers [X] [➡]  
Screwdriver #2 [X] [➡]  
Cordless Screwdriver [X] [➡]  
Screwdrivers [X] [➡]  
Leadership [X] [➡]  
Cordless Screwdrivers [X] [➡]  
Netgear Wireless Routers [X] [➡]

Step	Action
4	Optionally, to delete an existing saved search, click the <b>Delete</b> icon within the saved searches box. A confirmation will display that the Saved Search item has been successfully deleted.

Simple Search | My Suppliers | All Suppliers | e-Forms

All Categories [v] Search

Successfully deleted the Saved Search item.

**Recent Searches**

Jul 16, 2015  
"cordless drill" [👉]  
"c" [👉]  
"copy paper" [👉]  
\* [👉]  
Jul 15, 2015  
"strengths based leadership" [👉]  
\* [👉]  
\* [👉]  
Jul 14, 2015  
Notebook Lock [👉]  
Notebook Lock [👉]


**Saved Searches**

















Computer Tool Kits [X] [➡]  
Cordless Screwdriver Kits [X] [➡]  
Colored Copy Paper [X] [➡]  
Wireless Routers [X] [➡]  
Screwdriver #2 [X] [➡]  
Cordless Screwdriver [X] [➡]  
Screwdrivers [X] [➡]  
Leadership [X] [➡]  
Cordless Screwdrivers [X] [➡]  
Netgear Wireless Routers [X] [➡]


### 3.4.2 Reuse Carts and Share Carts

You can use reuse previously checked-out carts to create a new order. You can also share a saved cart or checked-out cart with another user, which will become their copy to use or modify.




#### 3.4.2.2 Use Checked-Out Cart to Create a New Order

Step	Action	
1	<p>Click on <b>Cart History</b>. The Cart History window will open. Here you will see a list of the carts that you have checked out.</p> <p>Note: Within Cart History, all of your saved carts will be shown. There is no limit to the number of saved carts you have or how long they they will be retained.</p>	

Line	Cart Name	Creation Date	Cart Description	Action
1	Checked Out Cart - 2015-06-10 12:28:53.404	06-10-2015 09:28:53 (PDT)	Checked out cart	   
2	Checked Out Cart - 2015-06-10 19:09:19.231	06-10-2015 16:09:19 (PDT)	Checked out cart	   
3	Checked Out Cart - 2015-06-15 13:02:54.546	06-15-2015 10:02:54 (PDT)	Checked out cart	   
4	Checked Out Cart - 2015-06-15 13:17:18.312	06-15-2015 10:17:18 (PDT)	Checked out cart	   




Step	Action	
2	<p>Icons are provided to the right of each line to take actions.</p> <p>Click on the <b>Shopping Cart</b> icon. The cart you have chosen will open. You can make changes here and check out.</p>	

## Shopping Cart

Product	Price	Update Cart	Extended Total
<b>Your Cart Total is \$714.47</b>			
 <b>Microsoft Sculpt Ergonomic Desktop</b> <small>Supplier:CDW-G by Anacapa Supplier Part #:3100210 UOM:EA Mfg: Mfg #:L5V-00001 Supplier AuxID:7376 LeadTime: Buyer Part#: MinOrderQuantity:1.0 UNSPSC:43211708</small>	\$94.14	Quantity <input type="text" value="2"/>	\$188.28 <a href="#">Remove</a>
 <b>Evoluent Right-Handed VerticalMouse 4 Wireless - mouse</b> <small>Supplier:CDW-G by Anacapa Supplier Part #:2692392 UOM:EA Mfg: Mfg #:VM4RW Supplier AuxID: LeadTime: Buyer Part#: MinOrderQuantity:1.0 UNSPSC:43211708</small>	\$105.49	Quantity <input type="text" value="1"/>	\$105.49 <a href="#">Remove</a>
 <b>Evoluent VerticalMouse 4 Small</b> <small>Supplier:CDW-G by Anacapa Supplier Part #:2289733 UOM:EA Mfg: Mfg #:VM4S Supplier AuxID:7376 LeadTime: Buyer Part#: MinOrderQuantity:1.0 UNSPSC:43211708</small>	\$84.14	Quantity <input type="text" value="5"/>	\$420.70 <a href="#">Remove</a>
<b>Your Cart Total is \$714.47</b>			

Step	Action
3	<p>Alternatively, you can also open the cart by clicking the <b>Cart Name</b> link.</p> <p>This can be helpful if you wish to confirm the cart contents prior to performing any actions.</p>
	<div style="border: 1px solid gray; padding: 5px;"> <p><b>Cart Name</b></p> <p><a href="#">Checked Out Cart - 2015-06-10 12:28:53.404</a></p> </div>
4	<p>The Cart History screen will display the contents of the checked-out cart.</p> <p>Click <b>Add to Cart</b>, and the cart will open.</p>




## Cart History screen

Line	Product Image	Description	Supplier Name	Part Number	Price	Unit	Qty	Last Modified On	Total
1		Microsoft Sculpt Ergonomic Desktop	CDW-G by Anacapa	3100210	\$94.14	EA	2		\$188.28
2		Evoluent Right-Handed VerticalMouse 4 Wireless - mouse	CDW-G by Anacapa	2692392	\$109.42	EA	1	07-07-2015	\$109.42
3		Evoluent VerticalMouse 4 Small	CDW-G by Anacapa	2289733	\$90.00	EA	5		\$450.00
<b>Total : \$747.70</b>									

[Return to Shopping](#)

Step	Action
5	<p>The cart is now available to use for your new order.</p> <p>See Section 4.0, <a href="#">Manage Your Shopping Cart and Checkout</a> for further instruction.</p>

## Shopping Cart


Product	Price	Update Cart	Extended Total
<b>Your Cart Total is \$714.47</b>			
 <b>Microsoft Sculpt Ergonomic Desktop</b> Supplier: CDW-G by Anacapa Supplier Part #: 3100210 UOM: EA Mfg: Mfg #: L5V-00001 Supplier AuxID: 7376 LeadTime: Buyer Part#: MinOrderQuantity: 1.0 UNSPSC: 43211708	\$94.14	Quantity <input type="text" value="2"/>	\$188.28 <a href="#">Remove</a>
 <b>Evoluent Right-Handed Vertical Mouse 4 Wireless - mouse</b> Supplier: CDW-G by Anacapa Supplier Part #: 2692392 UOM: EA Mfg: Mfg #: VM4RW Supplier AuxID: LeadTime: Buyer Part#: MinOrderQuantity: 1.0 UNSPSC: 43211708	\$105.49	Quantity <input type="text" value="1"/>	\$105.49 <a href="#">Remove</a>
 <b>Evoluent Vertical Mouse 4 Small</b> Supplier: CDW-G by Anacapa Supplier Part #: 2289733 UOM: EA Mfg: Mfg #: VM4S Supplier AuxID: 7376 LeadTime: Buyer Part#: MinOrderQuantity: 1.0 UNSPSC: 43211708	\$84.14	Quantity <input type="text" value="5"/>	\$420.70 <a href="#">Remove</a>
<b>Your Cart Total is \$714.47</b>			

### 3.4.2.2 Share Cart


Step	Action
1	<p>You can share a copy of a saved shopping cart with other users. This can be done in two ways:</p> <ul style="list-style-type: none"> <li>Clicking on the <b>Share</b> icon on the Cart History Page</li> <li>Clicking on the <b>Share Cart</b> button on the Saved Cards detail page</li> </ul>





**Share icon:**

**Action**



**Share Cart button:**



Line	Product Image	Description	Supplier Name	Part Number	Price	Unit	Qty	Last Modified On	Total
1		Strengths Based Leadership: Great Leaders, Teams, and Why People Follow	Complete Book and Media 	9781595620255	\$21.60	EA	1	06-26-2015	\$21.60
2		ViewSonic VG2439m-LED - LED monitor - 24"	CDW-G by Anacapa 	2759134	\$218.97	EA	2		\$437.94
									Total: \$459.54

[Return to Shopping](#)

Step	Action
2	After any of the above actions, you will be taken to the Share Cart page, where you will indicate who you want to share a copy of your cart with.

[Share Cart](#)

**Share Cart**  
[Cart History](#) > Share Cart

Cart Name: Checked Out Cart - 2015-06-10 12:28:53.404  
 Cart Description: Checked out cart

**Share With**

Email:  [Add to List](#)

Users List:  [Remove](#)

**Cart Contents**

Line	Product Image	Description	Supplier Name	Part Number	Price	Unit	Qty	Total
1		Strengths Based Leadership: Great Leaders, Teams, and Why People Follow	Complete Book and Media	9781595620255	\$21.60	EA	<input type="text" value="1.0"/>	\$21.60
2		ViewSonic VG2439m-LED - LED monitor - 24"	CDW-G by Anacapa	2759134	\$218.97	EA	<input type="text" value="2.0"/>	\$437.94
<b>Total : \$459.54</b>								

Step	Action	
3	First, enter the email address for the recipient. As you type in the email address, the system will identify matches (which will be provided in the drop-down menu) to select from.	<p><b>Share With</b></p> <p>Email: <input type="text" value="Psh"/> <a href="#">Add to List</a></p> <p>Users List: <input type="text" value="PSheth@bl.gov   EPROC USER"/> <a href="#">Remove</a></p>

Note: The recipient must have registered his or her email address in the system for it to be identified. To register the address, the recipient must have logged into eBuy at least once.

Step	Action
4	<p>Click <b>Add to List</b>.</p> <p>The email address will be added to the User List.</p> <div style="float: right;"> <p><b>Share With</b></p> <p>Email: <input type="text"/></p> <p>Users List: <span style="border: 1px solid red; padding: 2px;">PSheth@lbl.gov   EPROC</span></p> </div>
5	Click <b>Share Cart</b> at the top right of the window.

Share Cart

**Share Cart**

[Cart History](#) > Share Cart

Cart Name: Checked Out Cart - 2015-06-10 19:09:19.231  
 Cart Description: Checked out cart

**Share With**

Email:  Add to List

Users List: PSheth@lbl.gov | EPROC Remove

Step	Action
6	The Cart History Window will open and show that the cart was shared successfully.

**The cart has been shared successfully.**

Add to Cart
Share Cart
Edit Cart
Delete Cart
Export to Excel

**Cart History**

[Cart History](#) > Checked Out Cart - 2015-06-10 19:09:19.231

Line	Product Image	Description	Supplier Name	Part Number	Price	Unit	Qty	Last Modified On	Total
1	No Image	Strengths Based Leadership	Complete Book and Media	9781595620255	\$21.60	EA	1		\$21.60
2		ViewSonic VG2439m-LED - LED monitor - 24"	CDW-G by Anacapa	2759134	\$218.97	EA	2		\$437.94
<b>Total : \$459.54</b>									

Step	Action
7	The recipient will receive an email message notification that the cart has been shared.

From: <[do-not-reply-FMS@lbl.gov](mailto:do-not-reply-FMS@lbl.gov)>  
Date: Tue, Jul 7, 2015 at 1:44 PM  
Subject: A cart has been shared - LBL - Checked Out Cart - 2015-06-10 19:09:19.231  
To: [PSheth@lbl.gov](mailto:PSheth@lbl.gov)

Dear user,

This is to inform you that Ahearn, Kathryn A([do-not-reply-FMS@lbl.gov](mailto:do-not-reply-FMS@lbl.gov)) has shared an cart in LBL Marketplace. Please connect to Marketplace and go to your Saved Cart tab to view the cart shared by the user with a name Checked Out Cart - 2015-06-10 19:09:19.231\_07-07-2015.16.44.20. Cart Name: Checked Out Cart - 2015-06-10 19:09:19.231\_07-07-2015.16.44.20

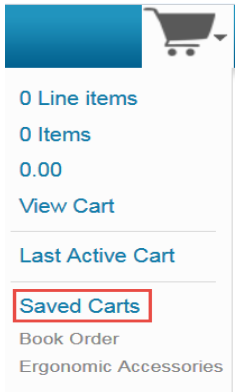
Shared On: 07-07-2015.16.44.20

- vSearch Catalog Setup


Environment Name: LBL

vSearch Catalog Version: 6.7SP1


Note : This is an auto-generated email. Do NOT reply to this mail.

Step	Action	
8	To access the shared cart, the recipient must log into the Marketplace and go the the Saved Cart tab. The email message provides the cart name and the date that it was shared.	

Please connect to Marketplace and go to your Saved Cart tab to view the cart shared by the user with a name Checked Out Cart - 2015-06-10 19:09:19.231\_07-07-2015.16.44.20. Cart Name: Checked Out Cart - 2015-06-10 19:09:19.231\_07-07-2015.16.44.20

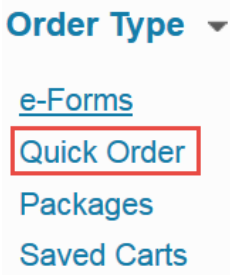
Step	Action	
9	The recipient is now the owner of this cart. He can add items to the cart, share the cart with another individual, edit the saved cart items, or delete the saved cart items.	
10	The recipient can modify the items in the shopping cart and check out by clicking the shopping cart icon. (See Section 4.3, <a href="#">Make Cart Changes.</a> )	

Note: The recipient is provided with a copy of the cart. Any changes made by the recipient will not impact the originator's cart contents. The recipient can share the newly modified cart back to the originator.



### 3.4.3 Place a Quick Order by Part Number(s)

Creating a Quick Order speeds up the process when you already know the part number and supplier of the item(s) you need to buy. You can even save a Quick Order for reuse.

Step	Action	
1	<p>You can navigate to Quick Order from the Order Type drop-down menu on the main landing page.</p> <p>Click the <b>Quick Order</b> link.</p>	
2	You will be taken to the Quick Order page, where you choose a supplier and enter part numbers to quickly add them to your cart.	

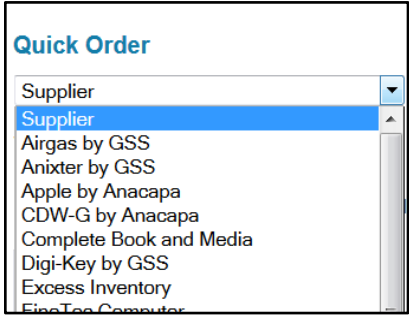
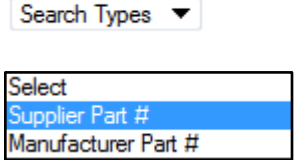


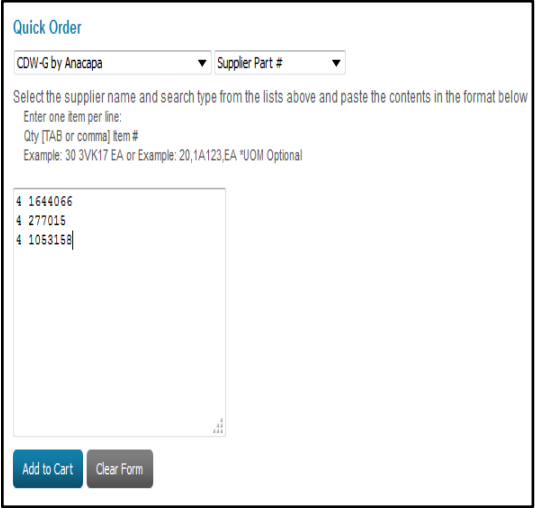
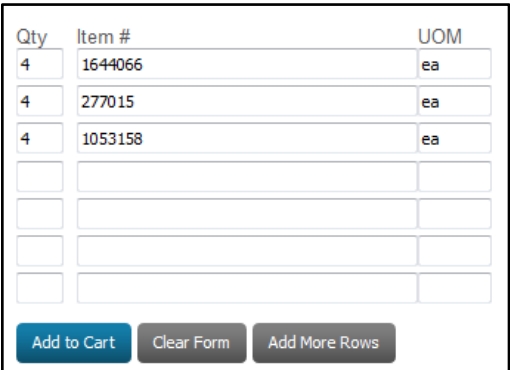
**Quick Order**

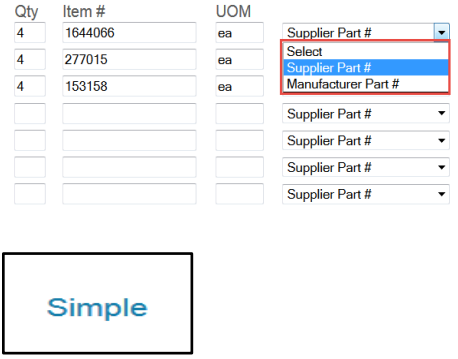
Supplier  Search Types

Select the supplier name and search type from the lists above and paste the contents in the format below  
 Enter one item per line:  
 Qty [TAB or comma] Item #  
 Example: 30 3VK17 EA or Example: 20,1A123,EA \*UOM Optional

Qty	Item #	UOM
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Step	Action	
3	To start a Quick Order, first click on the Supplier drop-down menu and select the supplier that you want to purchase item(s) from. You can also start typing the supplier name to find and select it.	
4	Based on the supplier you choose, the next step is to use the Search Types drop-down menu to choose whether you want to search by Supplier Part # or Manufacturer Part #. The drop-down menu will include only the options available for that supplier.	
5	There are two areas in Quick Order where you can enter information about the items you wish to order.	

Step	Action	
5a	<p>To use the entry box on the left:</p> <ul style="list-style-type: none"> <li>Enter the quantity, a space, and then your part number.</li> </ul> <p><u>OR</u></p> <ul style="list-style-type: none"> <li>Enter the quantity, a comma (with no space), and your part number.</li> </ul> <p><u>OR</u></p> <ul style="list-style-type: none"> <li>Copy and paste the quantity and part number information from an existing list (i.e., from a Word document or Excel spreadsheet).</li> </ul> <p>Note: Each item must be entered on a separate line.</p>	
5b	<p>Alternatively, you can use the table on the right to enter quantities, part numbers, and units of measure in the respective fields.</p> <p>Note: Unit of measure is an optional field.</p> <p>If you choose to use this right-hand option, you can add more lines, if needed, by pressing the <b>Add More Rows</b> button.</p>	

Step	Action	
5.c	<p>If the item numbers that you wish to order are a mix of Supplier Part # and Manufacturer Part #, use the <b>Advanced</b> link at the right side of the window to open a new screen. An additional column is added in this screen where you can specify the part number type for each line.</p> <p>You can revert back to the standard screen by clicking the <b>Simple</b> link which now displays on the Advanced screen.</p>	

### Quick Order

Advanced

Select the supplier name and search type from the lists above and paste the contents in the format below

Enter one item per line:  
Qty [TAB or comma] Item #  
Example: 30 3VK17 EA or Example: 20,1A123,EA \*UOM Optional

	Qty	Item #	UOM
<input style="width: 100%;" type="text"/>	<input type="text"/>	<input style="width: 100%;" type="text"/>	<input type="text"/>
<input style="width: 100%;" type="text"/>	<input type="text"/>	<input style="width: 100%;" type="text"/>	<input type="text"/>
<input style="width: 100%;" type="text"/>	<input type="text"/>	<input style="width: 100%;" type="text"/>	<input type="text"/>
<input style="width: 100%;" type="text"/>	<input type="text"/>	<input style="width: 100%;" type="text"/>	<input type="text"/>
<input style="width: 100%;" type="text"/>	<input type="text"/>	<input style="width: 100%;" type="text"/>	<input type="text"/>
<input style="width: 100%;" type="text"/>	<input type="text"/>	<input style="width: 100%;" type="text"/>	<input type="text"/>
<input style="width: 100%;" type="text"/>	<input type="text"/>	<input style="width: 100%;" type="text"/>	<input type="text"/>
<input style="width: 100%;" type="text"/>	<input type="text"/>	<input style="width: 100%;" type="text"/>	<input type="text"/>

Add to Cart
Clear Form

Add to Cart
Clear Form
Add More Rows

Step	Action	
6	<p>You can reuse a Quick Order by saving it to the Saved Quick Order List. Enter a Saved Quick Order List name in the field provided.</p>	

## Saved Quick Order List

You can select from the Quick Order List below or save a new Quick Order..

Select from List ▾

## Quick Order

Supplier ▾  Supplier Part # ▾

Select the supplier name and search type from the lists above and paste the contents in the format below

Enter one item per line:

Qty [TAB or comma] Item #

Example: 30 3VK17 EA or Example: 20,1A123,EA \*UOM Optional

Qty	Item #	UOM
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Step	Action
7	When placing a Quick Order in the future, you can select a Saved Search from the Saved Search List drop-down menu. The right-hand table will automatically populate.

## Saved Quick Order List

You can select from the Quick Order List below or save a new Quick Order.

Select from List ▾

Select from List

Anacapa Cables

## Saved Quick Order List

You can select from the Quick Order List below or save a new Quick Order..

Anacapa Cables ▾ Anacapa Cables

## Quick Order

CDW-G by Anacapa ▾  Supplier Part # ▾

Select the supplier name and search type from the lists above and paste the contents in the format below

Enter one item per line:

Qty [TAB or comma] Item #

Example: 30 3VK17 EA or Example: 20,1A123,EA \*UOM Optional

Qty	Item #	UOM	Supplier Part #
<input type="text" value="4.0"/>	<input type="text" value="1644066"/>	<input type="text" value="ea"/>	<input type="text" value="Supplier Part #"/>
<input type="text" value="4.0"/>	<input type="text" value="277015"/>	<input type="text" value="ea"/>	<input type="text" value="Supplier Part #"/>
<input type="text" value="4.0"/>	<input type="text" value="1053158"/>	<input type="text" value="ea"/>	<input type="text" value="Supplier Part #"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Supplier Part #"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Supplier Part #"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Supplier Part #"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Supplier Part #"/>

Step	Action																									
8	When you are done entering the items for the order, press the <b>Add to Cart</b> Button.	<table border="1"> <thead> <tr> <th>Qty</th> <th>Item #</th> <th>UOM</th> </tr> </thead> <tbody> <tr> <td><input type="text" value="4"/></td> <td><input type="text" value="1644066"/></td> <td><input type="text" value="ea"/></td> </tr> <tr> <td><input type="text" value="4"/></td> <td><input type="text" value="277015"/></td> <td><input type="text" value="ea"/></td> </tr> <tr> <td><input type="text" value="4"/></td> <td><input type="text" value="1053158"/></td> <td><input type="text" value="ea"/></td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </tbody> </table> <p><input type="button" value="Add to Order"/> <input type="button" value="Clear Form"/> <input type="button" value="Add More Rows"/></p>	Qty	Item #	UOM	<input type="text" value="4"/>	<input type="text" value="1644066"/>	<input type="text" value="ea"/>	<input type="text" value="4"/>	<input type="text" value="277015"/>	<input type="text" value="ea"/>	<input type="text" value="4"/>	<input type="text" value="1053158"/>	<input type="text" value="ea"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Qty	Item #	UOM																								
<input type="text" value="4"/>	<input type="text" value="1644066"/>	<input type="text" value="ea"/>																								
<input type="text" value="4"/>	<input type="text" value="277015"/>	<input type="text" value="ea"/>																								
<input type="text" value="4"/>	<input type="text" value="1053158"/>	<input type="text" value="ea"/>																								
<input type="text"/>	<input type="text"/>	<input type="text"/>																								
<input type="text"/>	<input type="text"/>	<input type="text"/>																								
<input type="text"/>	<input type="text"/>	<input type="text"/>																								
<input type="text"/>	<input type="text"/>	<input type="text"/>																								
9	<p>This will take you to a page where you can perform several tasks on each item using the buttons at the top right, including:</p> <ul style="list-style-type: none"> <li>• Duplicating the item</li> <li>• Adding the item to your Saved Search List</li> <li>• Adding selected item(s) to cart</li> <li>• Adding all items to cart</li> </ul> <p>You can perform these tasks on one or multiple items in the list by using the checkboxes to the left of the item lines.</p>																									

The screenshot shows the eBuy interface with the following elements:

- Navigation tabs: Simple Search, My Suppliers, All Suppliers, e-Forms.
- Search bar: All Categories (dropdown), Search button.
- Action buttons (highlighted with a red box): Duplicate items(s), Add to Saved Search List, Add Selected Item(s) to Cart, Add All Item(s) to Cart.
- Table of products:

Product	Price	Add To Cart
<input type="checkbox"/> <b>Tripp Lite 1ft Cat6 Gigabit Snagless Molded Patch Cable RJ45 M/M White 1'</b> Supplier: CDW-G by Anacapa Mfg #: N201-001-WH Supplier Part#: 1644066 UOM :EA	\$3.95	Quantity <input type="text" value="4"/>
<input type="checkbox"/> <b>C2G 3ft Cat5E 350 MHz Snagless Patch Cable - Blue</b> Supplier: CDW-G by Anacapa Mfg #: 15178 Supplier Part#: 277015 UOM :EA	\$2.96	Quantity <input type="text" value="4"/>
<input type="checkbox"/> <b>C2G 5ft Cat5E 350 MHz Snagless Patch Cable - Blue</b> Supplier: CDW-G by Anacapa Mfg #: 15188 Supplier Part#: 1053158 UOM :EA	\$3.95	Quantity <input type="text" value="4"/>

### 3.4.4 Create a Custom / Bulk / Non-Catalog Order

If you can't find an item in eBuy but know that a supplier provides it, you can add the item to the shopping cart by ordering from the Government Scientific Source (GSS) catalog or using e-Forms.

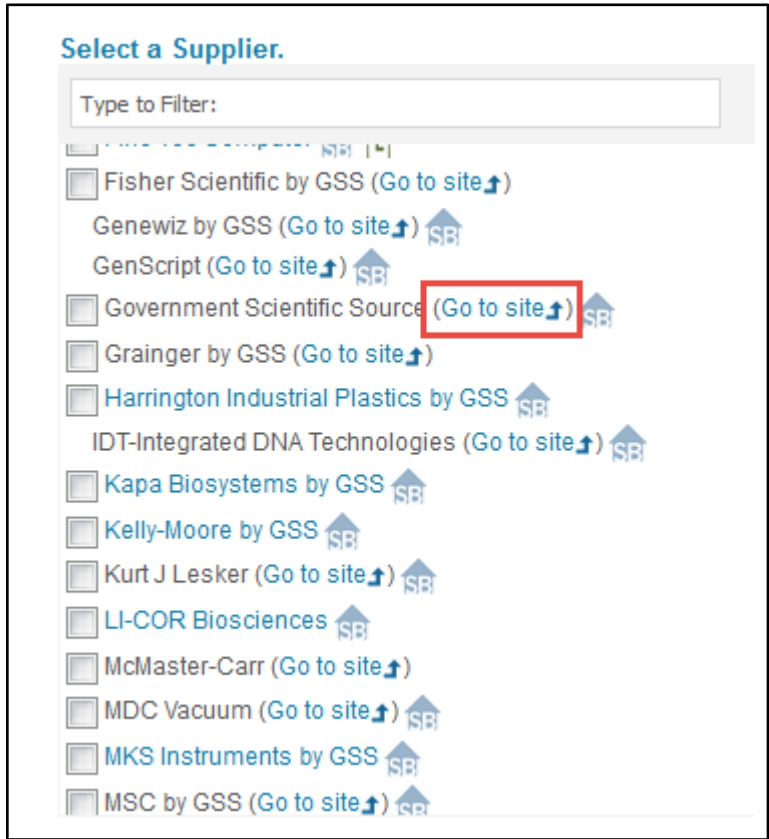
#### 3.4.4.1 Ordering Items Through the GSS Catalog for All Represented GSS Suppliers

Step	Action
1	You may obtain a price quote directly from the GSS catalog. You may also contact GSS directly. GSS contact information is provided on the Procurement eBuy website on the <a href="#">Supplier Information</a> page.
2	To obtain a quote directly from the GSS catalog, navigate to the All Suppliers tab.

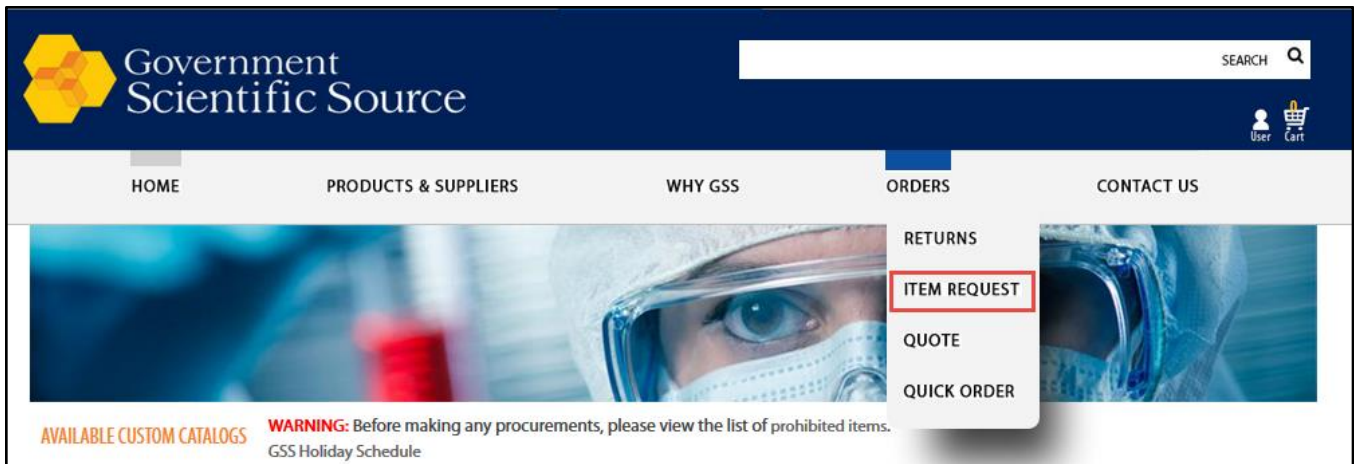
The screenshot shows the eBuy interface with the following elements:

- Navigation tabs: Simple Search, My Suppliers, All Suppliers (highlighted with a red box), e-Forms.
- Search bar: Search button.
- Search filters: Product Keyword (selected), Supplier Part #, Manufacturer Part #, Search Internal Catalogs.

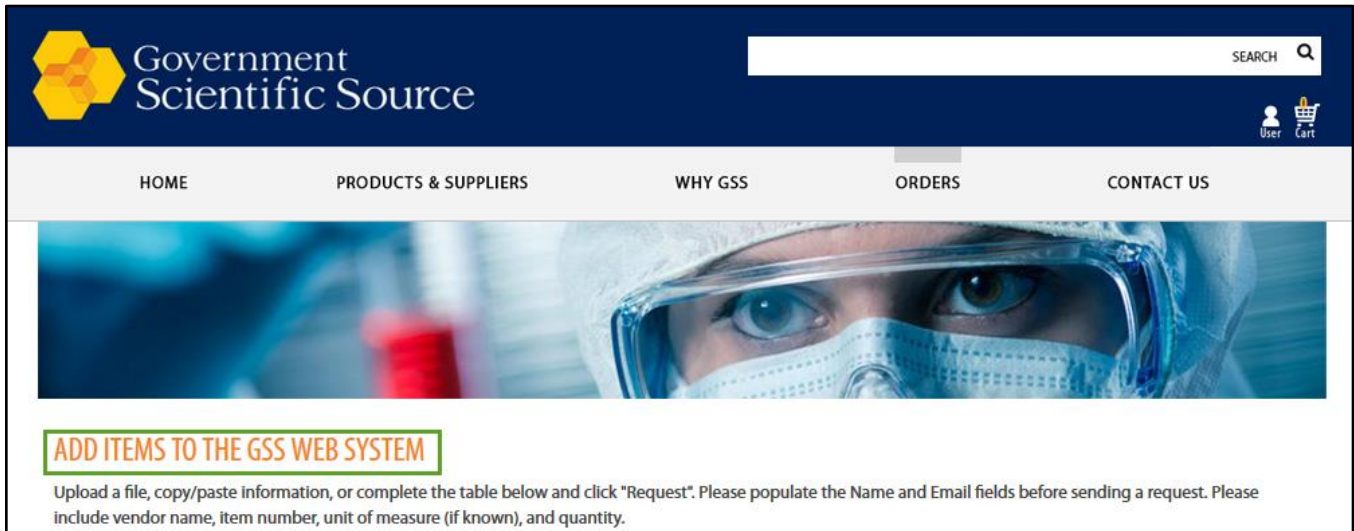
Step	Action
3	Scroll down and click the Go to site link to the right of the supplier's name.



Step	Action
4	You can navigate to the Item Request page from the Orders drop down menu on the main GSS catalog page.



Step	Action
5	You will be taken to the Item Request page, where you will enter your name, email address and information on your requested item. Select Request to receive an email quotation from GSS.

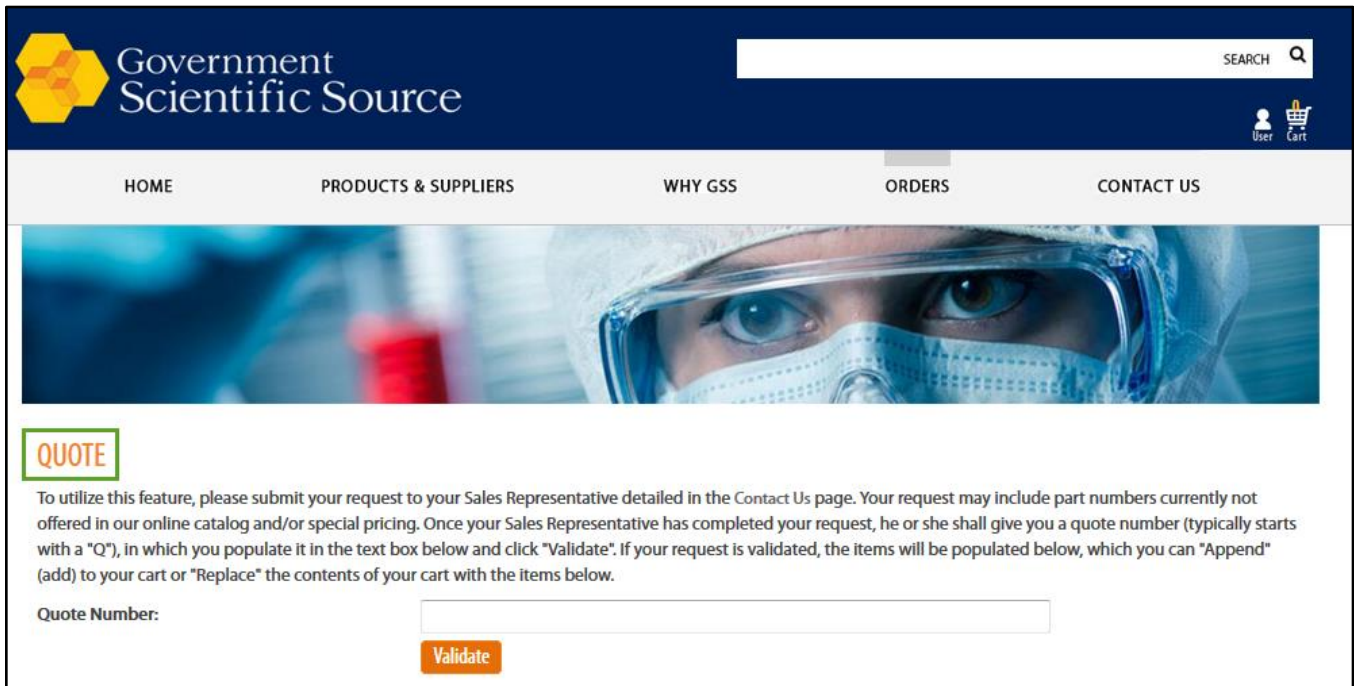


Step	Action
6	Once the quotation is received, you can navigate to the Quote page from the Orders drop down menu on the main GSS catalog page.





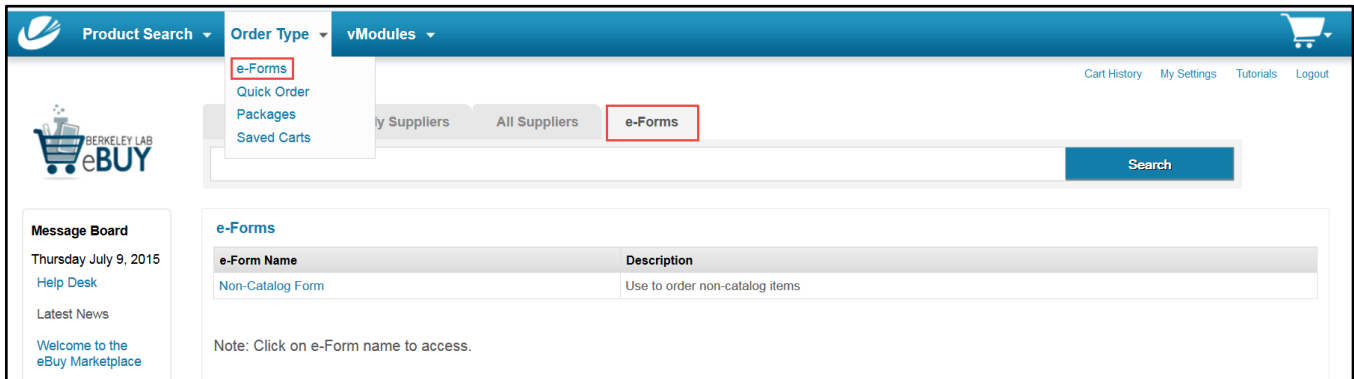
Step	Action
7	You will be taken to the Quote page, where you will enter your quote number. Select Validate and your items will now be available to add to your cart and checkout.



### 3.4.4.2 Using eForms

You can access e-Forms from one of two locations:

- The Order Type drop-down menu
- The e-Forms tab above the search field



Step	Action
1	<p>Contact the supplier directly to inquire about the item and to obtain a price quote. Supplier contact information is provided in each supplier's catalog and on the Procurement eBuy website on the <a href="#">Supplier Information</a> page.</p> <p>Note: The e-Form is used for one-time purchases. Submitting an e-Form will not add the item to the supplier's catalog.</p>
2	Click the <b>Non-Catalog Form</b> link.



Step	Action
3	<p>The E-Form / Non-Catalog Form page will open. Here you will enter the information described in steps 3a to 3g.</p> <p>Note: You will need to complete an e-Form for each item that you are ordering. You can not order multiple items on one e-Form.</p>

Step	Action
3a	<p><b>Supplier Name</b></p> <p>Select a supplier from the drop-down menu. You can also start typing the supplier name to find and select it.</p>

## E-Form / Non-Catalog Form

Select Your Supplier \*

Quote #:

Supplier Part #: \*

Product Name/Description: \*

Quantity: \*

Unit Of Measure:

Price Estimate: \*

Supplier Identity

UNSPSC Code

Select ▼

- Select
- Alameda Electric
- Apple by Anacapa
- CDW-G by Anacapa
- Clontech
- Complete Book
- Dell by Anacapa
- Fine Tec Computer
- Government Scientific Source
- Kurt J Lesker
- LI-COR Biosciences
- McMaster-Carr
- MDC Vacuum
- Nor-Cal Products
- S and S Supplies and Solutions
- Staples by Pacific Office Solutions
- Swagelok
- Thorlabs by GSS

USD ▼

Add To Active Cart

Step	Action
3b	<p><b>Quote # (Optional)</b></p> <p>Enter the quote # from the quote you received from the supplier.</p>
3c	<p><b>Supplier Part #</b></p> <p>Enter the part # provided by the supplier. (Note: This is not the manufacturer's part #.)</p>
3d	<p><b>Product Name/Description</b></p> <p>Enter a description for the item. The description should begin with a noun, and if applicable, include additional information such as color, dimension, weight, and any accessories that might be included in the quoted price.</p>
3e	<p><b>Quantity</b></p> <p>Enter the number of items you want to buy.</p>
3f	<p><b>Unit of Measure (Optional)</b></p> <p>Select a unit of measure from the drop-down menu.</p> <p>The unit of measure describes how the items are sold. Typically, the default unit of measure, EA-EACH, can be for most items. However, if the supplier sells items by another measure (i.e., per foot, lot, pack), make the proper selection.</p>
3g	<p><b>Price Estimate</b></p> <p>Enter the price estimate provided by the supplier.</p>
	<p>Note: The Supplier Identity / UNSPSC Code fields will auto-fill based upon the Supplier you select. The field is grayed out and is not changeable.</p>
4	<p>When entries are completed, click <b>Add to Active Cart</b> at the bottom of the page. The item will be added to your shopping cart.</p>

### E-Form / Non-Catalog Form

<b>Select Your Supplier *</b>	<input type="text" value="Dell by Anacapa"/>
<b>Quote #:</b>	<input type="text" value="#123456"/>
<b>Supplier Part #: *</b>	<input type="text" value="G3389181"/>
<b>Product Name/Description: *</b>	<input type="text" value="Adjustable Monitor Stand, Polyat"/>
<b>Quantity: *</b>	<input type="text" value="2"/>
<b>Unit Of Measure:</b>	<input type="text" value="EA - EACH"/>
<b>Price Estimate: *</b>	<input type="text" value="42.05"/> <input type="text" value="USD"/>
<b>Supplier Identity</b>	<input type="text" value="22"/>
<b>UNSPSC Code</b>	<input type="text" value="RESTEBUY"/>

[Add To Active Cart](#)

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## 4 MANAGE YOUR SHOPPING CART AND CHECK OUT

The items you wish to purchase need to be saved in a shopping cart. They can be added to the shopping cart from the Search Results page or the Compare Results page.

Note: The shipping method you select pertains to all of the items in that order. In addition, overnight shipping incurs additional costs. Therefore, if you require overnight shipping on only a portion of your items, place a separate order for those items and choose the overnight shipping method for that order when you check out in FMS. (See Section 5.1.6, [Select Shipping Method](#)).



### 4.1 Add Items from the Search Results Page

Step	Action
1	Perform the desired search.  The Search Results page is displayed, where you can select items for purchase and save the selection(s) in the Shopping Cart.
2	Select the item(s) you wish to purchase by clicking on the checkbox to the left of each item(s).
3	Enter the required quantity in the Quantity field.  Note: The default order quantity is one.
4	If you wish to add more than one item to the cart, click <b>Add to Cart</b> at the top of the page.  If you wish to add just that line item to the cart, click <b>Add to Cart</b> below the quantity field.

Simple Search My Suppliers All Suppliers e-Forms

All Categories "copy paper" Search

Refresh this Data Hide Product Images

Add to Cart Save Search Results Export

Showing 1 - 20 of 38 | 20 per page | 1 2

Product	Price	Add To Cart
<input type="checkbox"/> <p><b>Copy Paper, 8-1/2x11 in., White, PK10</b>            Supplier: Grainger by GSS Supplier Part #: 31UF71 UOM: EA Mfg: ABILITY ONE Mfg #: 7530-01-033-8891 Supplier AuxID:            LeadTime: Buyer Part#: MinOrderQuantity: 1  <a href="#">Alternate Supplier(s)</a></p>	\$107.84	Quantity <input type="text"/> Add to Cart
<input type="checkbox"/> <p><b>Staples 30% Recycled Copy Paper, LETTER-Size, 92/104 US/Euro Brightness, 20 lb., 8 1/2"H x 11"W, 500 Sheets/Rm</b>            Supplier: Staples by Pacific Office Solutions Supplier Part #: 492071 UOM: RM Mfg: 14111507 Mfg #: Staples 30% Recycled Copy            Paper Supplier AuxID: LeadTime: Buyer Part#: MinOrderQuantity: 1  <a href="#">Alternate Supplier(s)</a></p>	\$4.25	Quantity <input type="text"/> Add to Cart
<input checked="" type="checkbox"/> <p><b>Staples Pastels 30% Recycled Colored Copy Paper, 8 1/2" x 11", 20 lb., Lilac, 500 Sheets/Rm</b>            Supplier: Staples by Pacific Office Solutions Supplier Part #: 678826 UOM: RM Mfg: 14111507 Mfg #: Staples Pastels 30% Recy Supplier            AuxID: LeadTime: Buyer Part#: MinOrderQuantity: 1  <a href="#">Alternate Supplier(s)</a></p>	\$5.67	Quantity <input type="text"/> Add to Cart
<input type="checkbox"/> <p><b>Staples Pastels 30% Recycled Colored Copy Paper, 20 lb., 8 1/2" x 11", Pink, 500 Sheets/Rm</b>            Supplier: Staples by Pacific Office Solutions Supplier Part #: 490935 UOM: RM Mfg: STAPLES Mfg #: 14779 Supplier AuxID:            LeadTime: Buyer Part#: MinOrderQuantity: 1  <a href="#">Alternate Supplier(s)</a></p>	\$5.67	Quantity <input type="text"/> Add to Cart

Step	Action
5	A message indicating that the selected item(s) are added to the shopping cart is displayed.
6	Click on the <b>Click here to view your cart</b> link to view the shopping cart.

Simple Search My Suppliers All Suppliers e-Forms

All Categories "copy paper" Search

Refresh this Data Hide Product Images

Add to Cart Save Search Results Export

Showing 1 - 20 of 38 | 20 per page | 1 2

Item(s) successfully added to cart. [\(Click here to view your cart\)](#)

Product	Price	Add To Cart
<input type="checkbox"/> <p><b>Copy Paper, 8-1/2x11 in., White, PK10</b>            Supplier: Grainger by GSS Supplier Part #: 31UF71 UOM: EA Mfg: ABILITY ONE Mfg #: 7530-01-033-8891 Supplier AuxID:            LeadTime: Buyer Part#: MinOrderQuantity: 1  <a href="#">Alternate Supplier(s)</a></p>	\$107.84	Quantity <input type="text"/> Add to Cart
<input type="checkbox"/> <p><b>Staples 30% Recycled Copy Paper, LETTER-Size, 92/104 US/Euro Brightness, 20 lb., 8 1/2"H x 11"W, 500 Sheets/Rm</b>            Supplier: Staples by Pacific Office Solutions Supplier Part #: 492071 UOM: RM Mfg: 14111507 Mfg #: Staples 30% Recycled Copy            Paper Supplier AuxID: LeadTime: Buyer Part#: MinOrderQuantity: 1  <a href="#">Alternate Supplier(s)</a></p>	\$4.25	Quantity <input type="text"/> Add to Cart

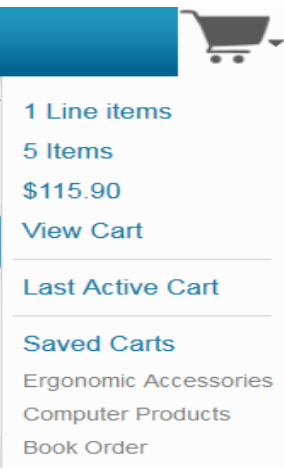
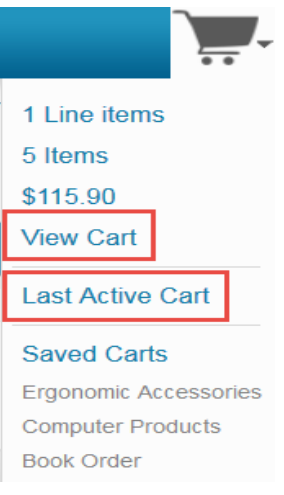


## 4.2 Access Saved and Checked-Out Carts


You can retrieve carts that you have saved using the Marketplace Shopping Cart icon. Here you can retrieve previously Saved Carts and use the View Cart link to navigate to the cart checkout page. If you inadvertently left the Marketplace without saving or checking out your cart, you can the cart using Active Cart.

If you wish to reuse a previously checked-out cart, you can call it up from the Cart History link. The following two sections provide instruction on how to navigate to these locations in the Marketplace.

### 4.2.1 Access Saved Carts














Step	Action	
1	<p>To open your shopping cart, click the shopping cart icon at the top right of the landing page.</p> <p>When you hover over the shopping cart icon you can see how many line items are in your cart, how many total items are in the cart, and the total value of the cart items.</p>	
2	<p>Click the <b>View Cart</b> link to navigate to the cart checkout page.</p> <p>By clicking <b>Last Active Cart</b>, you can navigate to the last active cart. The system autosaves any item that was entered into a cart. This is especially useful if the system times out or if you lose power or connection to the Marketplace. In those instances, you can just return to the last active cart, and any item(s) already placed in the cart will be available.</p>	

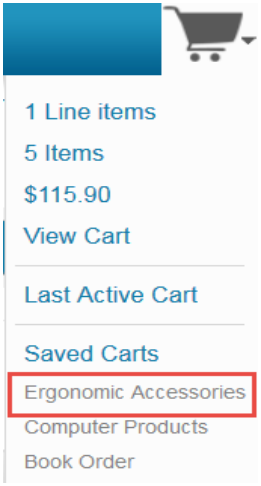
Step	Action
------	--------

3	You can call up a full list of your previously saved carts by clicking the <b>Saved Carts</b> link.	 <p>1 Line items 5 Items \$115.90 <a href="#">View Cart</a></p> <hr/> <p>Last Active Cart</p> <hr/> <p><b>Saved Carts</b></p> <ul style="list-style-type: none"> <li>Ergonomic Accessories</li> <li>Computer Products</li> <li>Book Order</li> </ul>
---	---	---

**Saved Carts**







Click on the saved cart name to view its contents.  
 Note: Some suppliers do not have the ability to provide updated availability and pricing information after a cart has been created. In those cases, items will be dropped from the cart.

Line	Cart Name	Creation Date	Cart Description	Action
1	<a href="#">Book Order</a>	06-09-2015 18:32:46 (PDT)	-	   
2	<a href="#">Computer Products</a>	07-08-2015 13:54:58 (PDT)	-	   
3	<a href="#">Ergonomic Accessories</a>	07-09-2015 11:41:19 (PDT)	Keyboards and mouse (wireless/non-wireless) = June Order.	   
4	<a href="#">Last Active Cart</a>	07-23-2015 18:02:26 (PDT)	Contains last imported cart items	

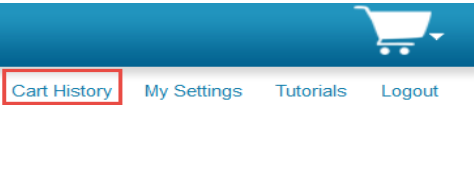
Step	Action	
4	You can also retrieve a recently Saved Cart from the gray links provided.	 <p>The screenshot shows a shopping cart icon at the top right. Below it, the cart summary includes: 1 Line items, 5 Items, \$115.90, and a View Cart link. Under 'Last Active Cart', there is a 'Saved Carts' section with three items: 'Ergonomic Accessories' (highlighted with a red box), 'Computer Products', and 'Book Order'.</p>
5	The Saved Carts screen will display the contents of the Saved Cart.	

























Add to Cart Share Cart Edit Cart Delete Cart Export to Excel


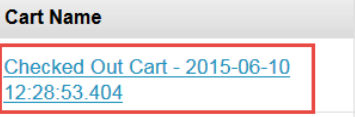
**Saved Carts**  
[Saved Carts > Ergonomic Accessories](#)

Line	Product Image	Description	Supplier Name	Part Number	Price	Unit	Qty	Last Modified On	Total
1		Microsoft Sculpt Ergonomic Desktop	CDW-G by Anacapa 	3100210	\$94.14	EA	2	07-09-2015	\$188.28
2		Evoluent Right-Handed VerticalMouse 4 Wireless - mouse	CDW-G by Anacapa 	2692392	\$105.49	EA	1	07-23-2015	\$105.49
3		Evoluent VerticalMouse 4 Small	CDW-G by Anacapa 	2289733	\$84.14	EA	5	07-23-2015	\$420.70
<b>Total : \$714.47</b>									





## 4.2.2 Access Cart History


Step	Action	
1	When you click on <b>Cart History</b> link, the Cart History window will open. Here you will see a list of the carts that you have checked out.	

Line	Cart Name	Creation Date	Cart Description	Action
1	<a href="#">Checked Out Cart - 2015-06-10 12:28:53.404</a>	06-10-2015 09:28:53 (PDT)	Checked out cart	   
2	<a href="#">Checked Out Cart - 2015-06-10 19:09:19.231</a>	06-10-2015 16:09:19 (PDT)	Checked out cart	   
3	<a href="#">Checked Out Cart - 2015-06-15 13:02:54.546</a>	06-15-2015 10:02:54 (PDT)	Checked out cart	   
4	<a href="#">Checked Out Cart - 2015-06-15 13:17:18.312</a>	06-15-2015 10:17:18 (PDT)	Checked out cart	   
5	<a href="#">Checked Out Cart - 2015-06-18 13:02:42.52</a>	06-18-2015 10:02:42 (PDT)	Checked out cart	   
6	<a href="#">Checked Out Cart - 2015-06-18</a>	06-18-2015 10:06:37 (PDT)	Checked out cart	   

Step	Action	
2	<p>Icons are provided on the right of each line to take the following actions. Instruction on each of these actions is provided in the sections indicated below:</p> <ul style="list-style-type: none"> <li>● Add to cart (see <a href="#">Section 4.3.1</a>)</li> <li>● Share the cart (see <a href="#">Section 3.4.2.2</a>)</li> <li>● Edit the cart (see <a href="#">Section 4.3.9</a>)</li> <li>● Delete the cart (see <a href="#">Section 4.3.10</a>)</li> </ul>	
3	<p>You can also open the cart by clicking the <b>Cart Name</b> link.</p> <p>This can be helpful if you wish to confirm the cart contents prior to performing any actions.</p>	

Step	Action
4	<p>The Cart History screen will display the contents of the checked-out cart. Here you can also:</p> <ul style="list-style-type: none"> <li>• Add to cart (see <a href="#">Section 4.3.1</a>)</li> <li>• Share the cart (see <a href="#">Section 3.4.2.2</a>)</li> <li>• Edit the cart (see <a href="#">Section 4.3.9</a>)</li> <li>• Delete the cart (see <a href="#">Section 4.3.10</a>)</li> </ul> <p>In addition, you can export the cart contents to Excel. (see <a href="#">Section 4.3.7</a>)</p>

Line	Product Image	Description	Supplier Name	Part Number	Price	Unit	Qty	Last Modified On	Total
1		Strengths Based Leadership: Great Leaders, Teams, and Why People Follow	Complete Book and Media 	9781595620255	\$21.60	EA	1	06-26-2015	\$21.60
2		ViewSonic VG2439m-LED - LED monitor - 24"	CDW-G by Anacapa 	2759134	\$218.97	EA	2		\$437.94
Total : \$459.54									

Note: If you make changes to your order in the Checkout - Review and Submit page in FMS later on, these changes will not be reflected in the checked-out cart. 

## 4.3 Make Cart Changes

### 4.3.1 Add Items to Cart

Step	Action
1	<ul style="list-style-type: none"> <li>To add items to the cart, click the shopping cart icon to open a Saved Cart or a Checked-Out cart (see image to the right).</li> </ul> <p><u>OR</u></p> <ul style="list-style-type: none"> <li>Click <b>Add to Cart</b> in the Saved Carts or Cart History screen (see image below).</li> </ul>



Click **Add to Cart** from the Saved Carts screen.

Line	Product Image	Description	Supplier Name	Part Number	Price	Unit	Qty	Last Modified On	Total
1		Microsoft Sculpt Ergonomic Desktop	CDW-G by Anacapa	3100210	\$94.14	EA	2	07-09-2015	\$188.28
2		Evoluent Right-Handed VerticalMouse 4 Wireless - mouse	CDW-G by Anacapa	2692392	\$105.49	EA	1	07-23-2015	\$105.49
3		Evoluent VerticalMouse 4 Small	CDW-G by Anacapa	2289733	\$84.14	EA	5	07-23-2015	\$420.70
<b>Total : \$714.47</b>									




Or click **Add to Cart** from the Cart History screen.

Line	Product Image	Description	Supplier Name	Part Number	Price	Unit	Qty	Last Modified On	Total
1		Copy Paper, LETTER-size, 92 Brightness, 20 lb., 8 1/2" x 11", 5,000 Sheets/Ct	Staples by Pacific Office Solutions	324791	\$27.08	CT	2		\$54.16
<b>Total : \$54.16</b>									

Step	Action
2	The cart will open for your use.

[Save Cart](#)
[Compare](#)
[Export](#)

[Remove All](#)
[Continue Shopping](#)
[Update Cart](#)
[Checkout](#)

	Product	Price	Update Cart	Extended Total
<b>Your Cart Total is \$714.47</b>				
<input type="checkbox"/>	 <b>Microsoft Sculpt Ergonomic Desktop</b> <small>Supplier:CDW-G by Anacapa Supplier Part #:3100210 UOM:EA Mfg: Mfg #L5V-00001 Supplier AuxID:7376 LeadTime: Buyer Part#: MinOrderQuantity:1.0 UNSPSC:43211708</small>	\$94.14	Quantity <input style="width: 50px;" type="text" value="2"/>	\$188.28 <a href="#">Remove</a>
<input type="checkbox"/>	 <b>Evoluent Right-Handed VerticalMouse 4 Wireless - mouse</b> <small>Supplier:CDW-G by Anacapa Supplier Part #:2692392 UOM:EA Mfg: Mfg #VM4RW Supplier AuxID: LeadTime: Buyer Part#: MinOrderQuantity:1.0 UNSPSC:43211708</small>	\$105.49	Quantity <input style="width: 50px;" type="text" value="1"/>	\$105.49 <a href="#">Remove</a>
<input type="checkbox"/>	 <b>Evoluent VerticalMouse 4 Small</b> <small>Supplier:CDW-G by Anacapa Supplier Part #:2289733 UOM:EA Mfg: Mfg #VM4S Supplier AuxID:7376 LeadTime: Buyer Part#: MinOrderQuantity:1.0 UNSPSC:43211708</small>	\$84.14	Quantity <input style="width: 50px;" type="text" value="5"/>	\$420.70 <a href="#">Remove</a>
<b>Your Cart Total is \$714.47</b>				

### 4.3.2 Remove Items from Cart

You can remove all or a portion of the items from the cart before checking out.

#### 4.3.2.1 Remove All

Step	Action
1	<p>Click the <b>Remove All</b> button at the top of the page to delete all items from the cart.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <div style="display: flex; justify-content: space-between; align-items: center;"> <div> <a href="#">Save Cart</a> <a href="#">Compare</a> <a href="#">Export</a> </div> <div> <a href="#">Remove All</a> <a href="#">Continue Shopping</a> <a href="#">Update Cart</a> <a href="#">Checkout</a> </div> </div> </div>
2	<p>A popup menu will display with a warning that the cart items will be permanently deleted.</p> <ul style="list-style-type: none"> <li>Click <b>OK</b> if you would like to clear the cart.</li> <li>Click <b>Cancel</b> if you do not want to clear the cart.</li> </ul>

All Categories Search

Save Cart Compare Export Remove All Continue Shopping Update Cart Checkout

The page at <https://lbi-dev.vinimaya.com> says:  
Warning : This will delete the cart items permanently

OK Cancel

Product	Price	Update Cart	Extended Total
<b>Your Cart Total is \$830.37</b>			
<b>Strengths Based Leadership: Great Leaders, Teams, and Why People Follow</b> Supplier: Complete Book and Media Supplier Part #: 9781595620255 UOM: EA Mfg #: Mfg #: #: 9781595620255 Supplier AuxID: LeadTime: Buyer Part#: MinOrderQuantity: 1.0 UNSPSC: 55000000	\$23.18	Quantity <input type="text" value="5"/>	\$115.90 <span style="float: right;">Remove</span>
<b>Microsoft Sculpt Ergonomic Desktop</b> Supplier: CDW-G by Anacapa Supplier Part #: 3100210 UOM: EA Mfg #: Mfg #: Supplier AuxID: 7376 LeadTime: Buyer Part#: MinOrderQuantity: 1.0 UNSPSC: 43211708	\$94.14	Quantity <input type="text" value="2"/>	\$188.28 <span style="float: right;">Remove</span>

Step	Action	
3	If you remove all the items from your cart, a new screen will display indicating that your shopping cart is empty.  To continue shopping, click the <b>Continue Shopping</b> link.	<div style="border: 1px solid gray; padding: 10px; background-color: #f9f9f9;"> <p style="color: #0070c0; font-weight: bold; font-size: 1.2em;">Your Shopping Cart is Empty</p> <p style="color: #0070c0; font-weight: bold; font-size: 1.2em;">Continue Shopping</p> </div>

#### 4.3.2.2 Remove a Line or Lines

Step	Action
1	To remove an item in the cart, click the box to the left of the line you wish to delete. Then click <b>Remove</b> on the right side of the line (below the extended cost).

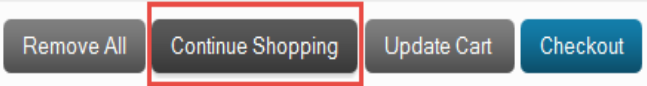
Save Cart Compare Export Remove All Continue Shopping Update Cart Checkout

Product	Price	Update Cart	Extended Total
<b>Your Cart Total is \$69.62</b>			
<b>Strengths Based Leadership</b> Supplier: Complete Book and Media Supplier Part #: 9781595620255 UOM: EA Mfg #: Mfg #: Part#: MinOrderQuantity: 1.0	\$21.60	Quantity <input type="text" value="3"/>	\$64.80 <span style="float: right;">Remove</span>
<input checked="" type="checkbox"/> <b>Belkin 5' CAT5e or CAT5 RJ45 Patch Cable Blue</b> Supplier: CDW-G by Anacapa Supplier Part #: 088605 UOM: EA Mfg #: Mfg #: #: A3L791-05-BLU Supplier AuxID: LeadTime: Buyer Part#: MinOrderQuantity: 1.0	\$1.75	Quantity <input type="text" value="1"/>	\$1.75 <span style="border: 1px solid red; padding: 2px;">Remove</span>
<b>Belkin 1' CAT5e or CAT5 Snagless RJ45 Patch Cable Green</b> Supplier: CDW-G by Anacapa Supplier Part #: 098937 UOM: EA Mfg #: Mfg #: #: A3L791-01-GRN-S Supplier AuxID: LeadTime: Buyer Part#: MinOrderQuantity: 1.0	\$1.32	Quantity <input type="text" value="1"/>	\$1.32 <span style="float: right;">Remove</span>
<b>Belkin 3' CAT5e or CAT5 Snagless RJ45 Patch Cable Yellow</b> Supplier: CDW-G by Anacapa Supplier Part #: 073953 UOM: EA Mfg #: Mfg #: #: A3L791-03-YLW-S Supplier AuxID: LeadTime: Buyer Part#: MinOrderQuantity: 1.0	\$1.75	Quantity <input type="text" value="1"/>	\$1.75 <span style="float: right;">Remove</span>
<b>Your Cart Total is \$69.62</b>			



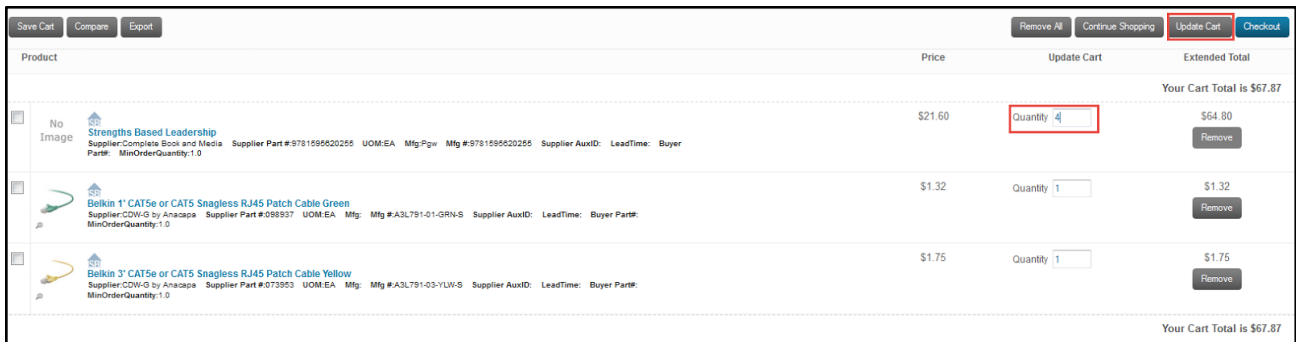
### 4.3.3 Continue Shopping

From the Cart screen, you can go back to the Marketplace main page to shop, search, and add more items to your shopping cart before checking out. This allows you to add products from multiple suppliers to your shopping cart.

Step	Action
1	<p>Click the <b>Continue Shopping</b> button.</p> 

### 4.3.4 Update the Quantity of Items in Your Cart

If you wish to change the quantity of items you are ordering, type in the new quantity, then click **Update Cart**.





Product	Price	Update Cart	Extended Total
No Image Strengths Based Leadership Supplier: Complete Book and Media Part#: MinOrderQuantity:1.0 Supplier Part # 9781595620255 UOM:EA Mfg: Mfg # 9781595620255 Supplier AuxID: LeadTime: Buyer Part:	\$21.60	Quantity <input type="text" value="4"/>	\$64.80 Remove
Belkin 1' CAT5e or CAT5 Snagless RJ45 Patch Cable Green Supplier: CDW-G by Anacapa Supplier Part # 098937 UOM:EA Mfg: Mfg # A3L791-01-GRN-S Supplier AuxID: LeadTime: Buyer Part:	\$1.32	Quantity <input type="text" value="1"/>	\$1.32 Remove
Belkin 3' CAT5e or CAT5 Snagless RJ45 Patch Cable Yellow Supplier: CDW-G by Anacapa Supplier Part # 073953 UOM:EA Mfg: Mfg # A3L791-03-YLW-S Supplier AuxID: LeadTime: Buyer Part:	\$1.75	Quantity <input type="text" value="1"/>	\$1.75 Remove

Your Cart Total is \$67.87

### 4.3.5 Save Your Cart

Step	Action
1	You can save the cart and continue shopping later by clicking the <b>Save Cart</b> icon.

Save Cart Compare Export Remove All Continue Shopping Update Cart Checkout

Product	Price	Update Cart	Extended Total
<b>Your Cart Total is \$136.31</b>			
 <b>Apple Magic Mouse</b> <small>Supplier:CDW-G by Anacapa Supplier Part #:1907655 UOM:EA Mfg: Mfg            #:MB829LL/A Supplier AuxID: LeadTime: Buyer Part#: MinOrderQuantity:1.0 UNSPSC:43211708</small>	\$67.77	Quantity <input type="text" value="2"/>	\$135.54
 <b>CDW 3' CAT5e or CAT5 RJ45 Patch Cable Green</b> <small>Supplier:CDW-G by Anacapa Supplier Part #:630131 UOM:EA Mfg: Mfg            #:A3L781-03GR-CDW Supplier AuxID: LeadTime: Buyer Part#: MinOrderQuantity:1.0 UNSPSC:26121609</small>	\$0.77	Quantity <input type="text" value="1"/>	\$0.77
<b>Your Cart Total is \$136.31</b>			





Step	Action
2	A window will display where you can name this cart and enter a cart description.
3	When done, click <b>Save Cart</b> at the top right of the window.


[Add To Existing Saved Cart](#)
[Save Cart](#)

**Add to Saved Cart**

Cart Name:

Cart Description:

Line	Product Image	Description	Supplier Name	Part Number	Price	Unit	Qty	Total
1		Apple Magic Mouse	CDW-G by Anacapa 	1907655	\$67.77	EA	2	\$135.54
2		CDW 3' CAT5e or CAT5 RJ45 Patch Cable Green	CDW-G by Anacapa 	630131	\$0.77	EA	1	\$0.77
								Total : \$136.31






- Notes:**
- The cart name should only contain alphanumeric characters (A-Z, a-z, 0-9) and the characters (&#x2D;\_:-.).
  - The cart name is limited to 40 characters
  - The cart description is limited to 255 characters
- 

Step	Action
4	Confirmation that the cart was saved successfully will display. <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <div style="display: flex; justify-content: space-around;"> <span>Save Cart</span> <span>Compare</span> <span>Export</span> </div> <p style="color: green; font-weight: bold; margin-top: 5px;">Cart Saved Successfully</p> </div>

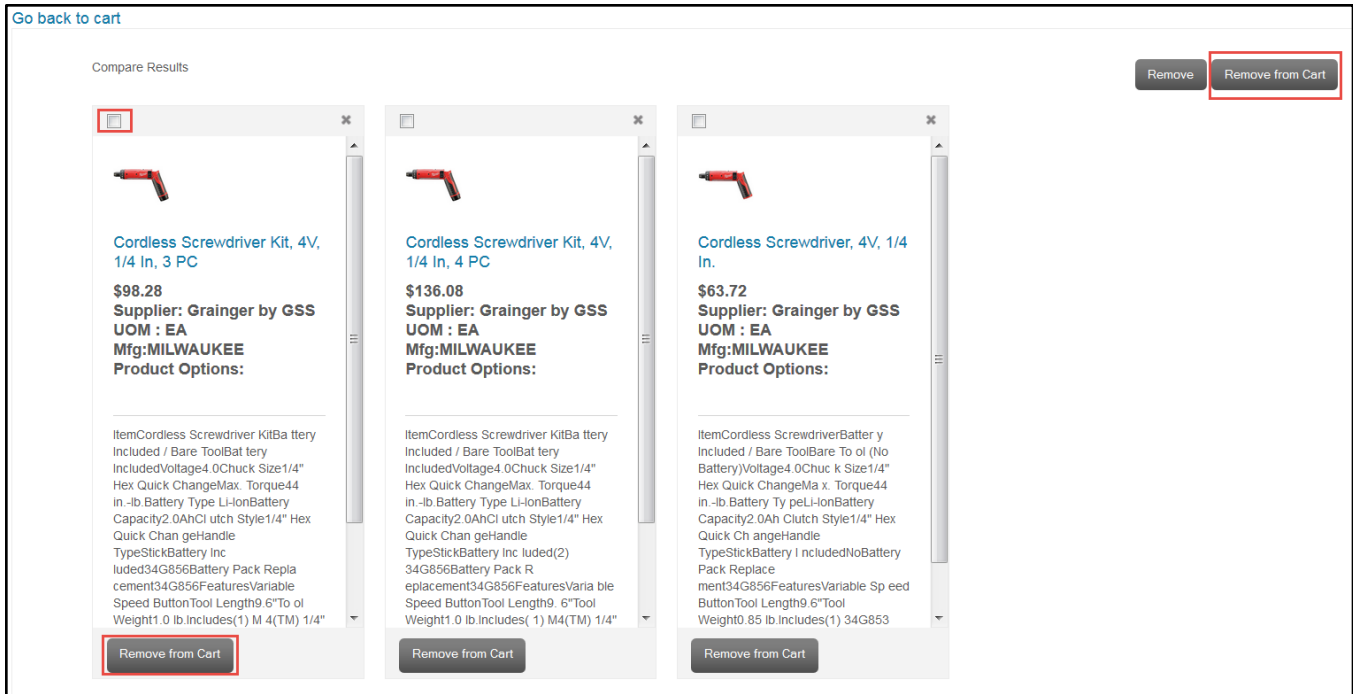
### 4.3.6 Compare Items in Your Cart

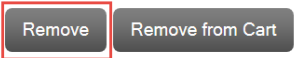
If you have multiple items in the cart, you can compare any or all of those items.

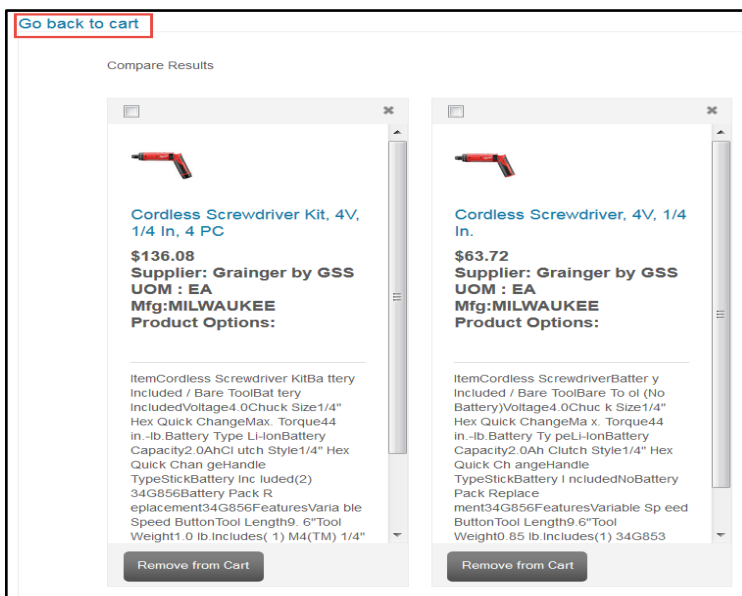
Step	Action
1	Select the checkbox next to each item you want to compare, then press the <b>Compare</b> button.

Product	Price	Update Cart	Extended Total
<b>Your Cart Total is \$595.54</b>			
<input type="checkbox"/>  <b>Cordless Screwdriver Kit, 3.6V</b> Supplier:Grainger by GSS Supplier Part #:40F272 UOM:EA Mfg:BLACK & DECKER Mfg #:LI2000 Supplier AuxID: LeadTime: Buyer Part#: MinOrderQuantity:1.0 UNSPSC:27112710	\$10.39	Quantity <input type="text" value="1"/>	\$10.39 <input type="button" value="Remove"/>
<input checked="" type="checkbox"/>  <b>Cordless Screwdriver Kit, 4V, 1/4 In, 3 PC</b> Supplier:Grainger by GSS Supplier Part #:34G854 UOM:EA Mfg:MILWAUKEE Mfg #:2101-21 Supplier AuxID: LeadTime: Buyer Part#: MinOrderQuantity:1.0 UNSPSC:27112710	\$98.28	Quantity <input type="text" value="2"/>	\$196.56 <input type="button" value="Remove"/>
<input checked="" type="checkbox"/>  <b>Cordless Screwdriver Kit, 4V, 1/4 In, 4 PC</b> Supplier:Grainger by GSS Supplier Part #:34G855 UOM:EA Mfg:MILWAUKEE Mfg #:2101-22 Supplier AuxID: LeadTime: Buyer Part#: MinOrderQuantity:1.0 UNSPSC:27112710	\$136.08	Quantity <input type="text" value="2"/>	\$272.16 <input type="button" value="Remove"/>
<input type="checkbox"/>  <b>Cordless Screwdriver, 4V Max Li-Ion</b> Supplier:Grainger by GSS Supplier Part #:22DL17 UOM:EA Mfg:SKIL Mfg #:2356-01 Supplier AuxID: LeadTime: Buyer Part#: MinOrderQuantity:1.0 UNSPSC:27112710	\$52.71	Quantity <input type="text" value="1"/>	\$52.71 <input type="button" value="Remove"/>
<input checked="" type="checkbox"/>  <b>Cordless Screwdriver, 4V, 1/4 In.</b> Supplier:Grainger by GSS Supplier Part #:34G853 UOM:EA Mfg:MILWAUKEE Mfg #:2101-20 Supplier AuxID: LeadTime: Buyer Part#: MinOrderQuantity:1.0 UNSPSC:27112710	\$63.72	Quantity <input type="text" value="1"/>	\$63.72 <input type="button" value="Remove"/>
<b>Your Cart Total is \$595.54</b>			

Step	Action
2	<p>The items will be presented side-by-side for comparison. If you wish to delete an item from your cart:</p> <ul style="list-style-type: none"> <li>Click <b>Remove from Cart</b> directly below the product description</li> </ul> <p><u>OR</u></p> <ul style="list-style-type: none"> <li>Click the box(s) at the top of the product window, then click <b>Remove from Cart</b> on the top far-right of the window.</li> </ul>



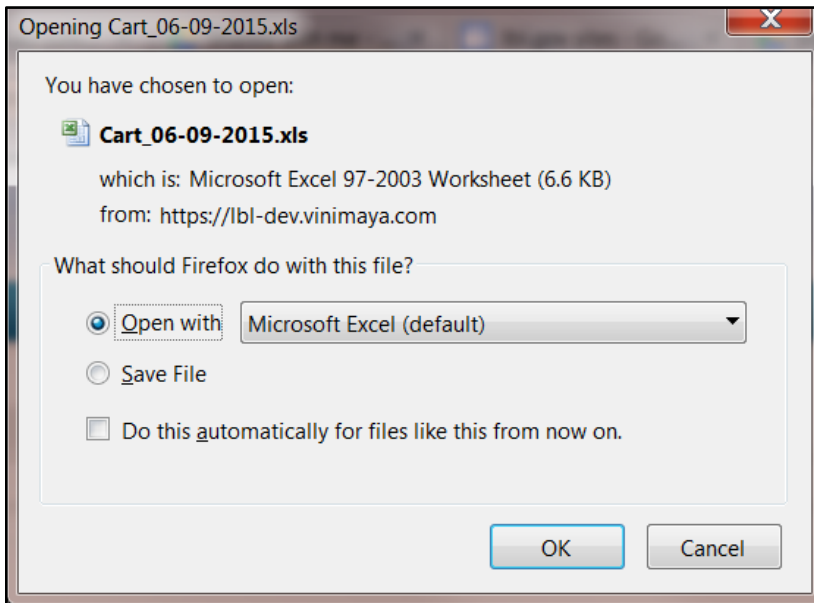
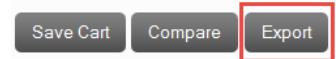
Step	Action	
3	You also have the option to remove any products from the Compare Results window by clicking <b>Remove</b> at the top right of the window.	
4	When you are done comparing products, return to the cart by clicking the blue <b>Go back to cart</b> link at the top left of the page.	



### 4.3.7 Export Your Cart to Excel

You can export details on the items you are ordering to an Excel spreadsheet for future reference.




Step	Action
1	<p>Click the <b>Export</b> button.</p> <p>This will generate an Excel spreadsheet, which you can either open or save.</p> <p>The Excel spreadsheet will provide a row for each item, with details such as item description, manufacturer, supplier part number, quantity, unit, and price.</p>



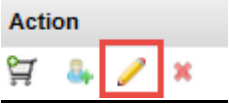

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Line No.	Supplier Part No.	Description	Long Description	Quantity	Unit	Price	Currency	Total	Delivery Days	Supplier Name	Manufacturer Part No.	Manufacturer Name	Minimum Order Quantity	UNSPSC
2	1	3100210	Microsoft Sculpt Ergonomic Desktop		1.0	EA	94.15	USD	\$94.15	0	CDW-G by Anacapa	MICROSOFT HARDWARE	43211708	1.0	43211708
3	2	2692392	Evoluent Right Handed VerticalMouse 4 Wireless mouse		1.0	EA	108.89	USD	\$108.89	0	CDW-G by Anacapa	KeyOvation	43211708	1.0	43211708
4	3	2289733	Evoluent VerticalMouse 4 Small		5.0	EA	90.00	USD	\$450.00	0	CDW-G by Anacapa	KeyOvation	43211708	1.0	43211708
5							<b>Total</b>		<b>\$653.04</b>						

### 4.3.8 Check Out Cart

When every product you wish to purchase is listed in the cart, and the quantities are correct, click **Checkout**.

Save Cart		Compare	Export	Remove All	Continue Shopping	Update Cart	Checkout
Product	Price	Update Cart	Extended Total				
<b>Your Cart Total is \$67.87</b>							
 <p><b>Strengths Based Leadership</b>            Supplier: Complete Book and Media            Part#: MinOrderQuantity:1.0            Supplier Part #: 9781595620255 UOM:EA Mfg Pgw Mfg #: 9781595620255 Supplier AuxID: LeadTime: Buyer</p>	\$21.60	Quantity <input type="text" value="4"/>	\$64.80	<a href="#">Remove</a>			
 <p><b>Belkin 1' CAT5e or CAT5 Snagless RJ45 Patch Cable Green</b>            Supplier: CDW-G by Anacapa            Part#: MinOrderQuantity:1.0            Supplier Part #: 095937 UOM:EA Mfg: Mfg #: A3L791-01-GRN-S Supplier AuxID: LeadTime: Buyer Part#:</p>	\$1.32	Quantity <input type="text" value="1"/>	\$1.32	<a href="#">Remove</a>			
 <p><b>Belkin 3' CAT5e or CAT5 Snagless RJ45 Patch Cable Yellow</b>            Supplier: CDW-G by Anacapa            Part#: MinOrderQuantity:1.0            Supplier Part #: 073853 UOM:EA Mfg: Mfg #: A3L791-03-YLW-S Supplier AuxID: LeadTime: Buyer Part#:</p>	\$1.75	Quantity <input type="text" value="1"/>	\$1.75	<a href="#">Remove</a>			
<b>Your Cart Total is \$67.87</b>							

### 4.3.9 Edit Cart Name or Description

Step	Action	
1	<p>You can update the saved cart name, description, or item quantity. To open the window:</p> <ul style="list-style-type: none"> <li>Click the <b>Edit</b> icon.</li> </ul> <p><u>OR</u></p> <ul style="list-style-type: none"> <li>Click the <b>Edit Cart</b> button on the Saved Carts or Cart History screen.</li> </ul>	<p><u>Edit icon:</u></p>  <p><u>Edit Cart button:</u></p> 
2	Click <b>Update Cart</b> when you have finished with edits.	

[Update Cart](#)





**Edit Cart History**

Cart History > Checked Out Cart - 2015-06-10 12:28:53.404

Cart Name:


Cart Description:

**Cart Contents**

Delete	Product Image	Description	Supplier Name	Part Number	Price	Unit	Qty	Total
<input type="checkbox"/>		Strengths Based Leadership: Great Leaders, Teams, and Why People Follow	Complete Book and Media 	9781595620255	\$21.60	EA	<input type="text" value="1"/>	\$21.60
<input type="checkbox"/>		ViewSonic VG2439m-LED - LED monitor - 24"	CDW-G by Anacapa 	2759134	\$218.97	EA	<input type="text" value="2"/>	\$437.94
<b>Total: \$459.54</b>								

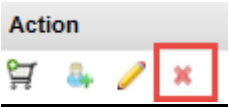
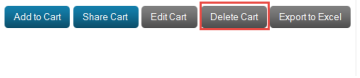
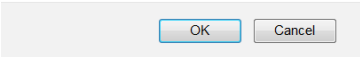
**Note:**

- Cart Name field is limited to 40 characters.
- Card Description field is limited to 255 characters.





### 4.3.10 Delete Cart

Step	Action	
1	<p>You can delete a cart in two ways:</p> <ul style="list-style-type: none"> <li>Click the <b>Delete</b> icon.</li> </ul> <p><u>OR</u></p> <ul style="list-style-type: none"> <li>Click the <b>Edit Cart</b> button on the Saved Carts or Cart History screen.</li> </ul>	<p><u>Delete icon:</u></p>  <p><u>Delete Cart button:</u></p> 
2	<p>You will receive a warning that the action will delete the cart history permanently.</p> <p>Click <b>OK</b> or <b>Cancel</b>.</p>	<p>The page at <a href="https://lbi-dev.vinimaya.com">https://lbi-dev.vinimaya.com</a> says:</p> <p>Warning : This action will delete cart history permanently</p> 

## 5 COMPLETE AND MANAGE YOUR ORDER

Once you click the **Checkout** button, the information from your chart will be transferred to the **Checkout - Review and Submit** page in FMS. Here you will complete your order.

**Checkout - Review and Submit**

Review the item information and submit the req for approval.

Requisition Summary

Business Unit:  Lawrence Berkeley National Lab

\*Requester:  Ahearn, Kathryn A

\*Currency:

\*Deliver To Location:

\*SAS Approver:

Shipping Method:  [Overnight applies to ALL Req Items. Click to Learn More](#)

Cart Summary: Total Amount 908.51 USD

Expand lines to review shipping and accounting details

[Copy Line 1 Project\(s\) and Activity\(s\) to All Lines](#) [Add More Items](#)

### 5.1 Set Options for Entire Order

#### 5.1.1 Apply Default Project / Activity

If you would like to apply a default value for a Project and Activity, use the following steps.

Step	Action
1	Log into the Requisition module in the Financial Management System (FMS) and click the <b>Requisition Settings</b> link.

**BERKELEY LAB - FMS**

Home My Preferences **Requisition Settings** 0 Lines Checkout

Request Options Search All Search Advanced Search

Enter search criteria or select from the menu on the right to begin creating your requisition.

- Catalog**: Browse Catalogs, LBNL Item Cat
- eBuy**: Shop Supplier Catalogs, All Other Products
- Special Requests**: Create a non-catalog request
- Forms**: Create and Submit Forms
- Favorites**: Browse Favorite Items and

Step	Action
2	In the Requisition Settings screen, you can enter preferred default values. Select the <b>Chartfields3</b> Tab.


The screenshot shows the 'Shipping Defaults' window. At the top, there are fields for 'Ship To' (069-0150), 'Due Date', and 'Attention'. Below this is the 'Accounting Defaults' section, which includes a tabbed interface with 'Chartfields1', 'Chartfields2', and 'Chartfields3' (the latter is highlighted with a red box). The 'Chartfields3' tab is active, showing fields for 'Percent', 'Location' (058-0106M), 'GL Unit' (LBNL), and 'Account'. Navigation buttons like 'Personalize', 'Find', 'First', and 'Last' are visible at the top right of the Accounting Defaults section.

Step	Action
3	Enter values in the PC Bus Unit: LBNL and Project & Activity (You can return at any time to modify these values).
4	Click <b>OK</b> .

This screenshot shows the 'Shipping Defaults' window with the 'Accounting Defaults' section expanded. The 'Chartfields3' tab is selected. The fields are populated with: 'PC Bus Unit' (LBNL), 'Project' (100117), 'Activity' (001), 'Source Type', 'Category', 'Subcategory', and 'Order Number'. At the bottom left, the 'OK' button is highlighted with a red box, and the 'Cancel' button is visible next to it.

### 5.1.2 Disable the Autofill Function

If you would like to disable the autofill function when applying the Project and Activity, use the following steps.

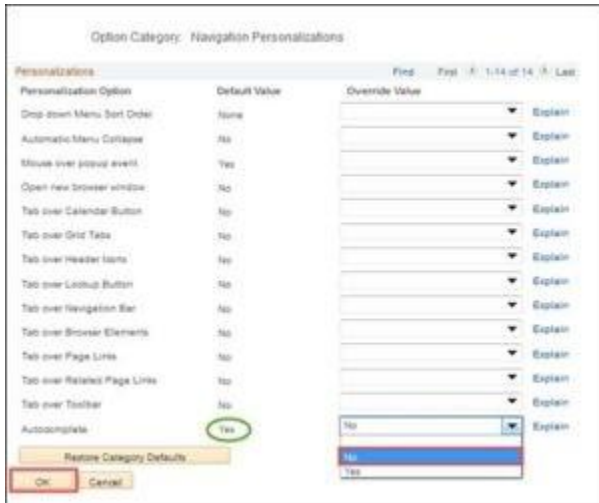
Step	Action
1	Click the <b>Main Menu</b> link at the top of the FMS screen. 
2	In the window that opens, click the <b>My Personalizations</b> link.



Step	Action
3	In the next window that opens, click the <b>Personalize Navigation Personalizations</b> link.



Step	Action
4	A list of Personalization options will display. To disable the autocomplete function, select <b>No</b> from the Override Value drop-down menu, then click <b>OK</b> . The next time you log in to FMS, autocomplete will be turned off.



### 5.1.3 Apply Same Attention To / Ship To Information

If you would like to apply who the package is to be delivered to in the Attention field and also the Ship to Location, use the following steps.

Step	Action
1	Click on <b>Requisition Settings</b> at the top right of the screen. The Requisition Settings window will open.

Step	Action
2	Enter the name of the individual who the package is to be delivered to in the Attention field and/or choose the Ship to Location by selecting the magnifying glass / lookup icon, you can choose Will Call or one of four Ship to Locations 1) LBNL Main Receiving, 2) Metal Stores Building 79, 3) JGI Receiving, or 4) eBuy Brookhaven Laboratory. (NO DELIVERY is not applicable).
3	Click <b>OK</b> .

#### 5.1.4 Apply Same Project / Activity / Work Order Number to Entire Order

If you would like to apply the same Project, Activity, and Work Order Numbers to the entire order, use the following steps.

<p>Note: Project(s) and Activity(s) cannot copy to lines past 125. If you have 126 or more lines, the entries must be made manually for the additional lines past 125.</p> <p>Note: If the order is for goods or services on a Maximo Work Order, you must enter the Work Order number in addition to the Project(s)/Activity(s) (see Step 3 below).</p> <p>Before preparing the order, if you only know the Maximo Work Order number, you must first log into Maximo and look up the Work Order to determine the Project and Activity associated with that Work Order.</p>	
---	--

Step	Action
1	Enter the Project that is funding the entire purchase. You can use the magnifying glass / lookup icon to help locate it.

The screenshot shows the 'Requisition Lines' interface. A 'Look Up Project' dialog box is open, allowing the user to search for a project. The 'Project' field is set to 'begins with' and contains '10088'. The 'Description' field is also set to 'begins with'. A 'Look Up' button is highlighted in red. The search results list shows several projects, with '100881 CF\_Procurement & Property' highlighted in red. The background shows a requisition line for 'Extreme Standing Mat, Medium' with a quantity of 1 and a price of 408.41.

Step	Action
2	Enter the Activity associated with the Project or use the magnifying glass / lookup icon to select the Activity associated with the Project.

The screenshot shows the 'Requisition Lines' interface. A 'Look Up Activity' dialog box is open, allowing the user to search for an activity. The 'Activity' field is set to 'begins with' and the 'WBS ID' field is also set to 'begins with'. A 'Look Up' button is highlighted in red. The search results list shows 15 activities, with '002 Business Assurance' highlighted in red. The background shows the same requisition line for 'Extreme Standing Mat, Medium' with a quantity of 1 and a price of 408.41.

Note: If you need assistance with which Project / Activity to use, contact your Resource Analyst.




Step	Action
3	<p>If applicable, enter the Work Order number.</p> <p>Click the Chartfields3 Tab, and type in the Work Order number in the Order Number field, or use the magnifying glass / lookup icon to select the Work Order number.</p>



Step	Action
4	<p>Click on the <b>Copy Line 1 Project(s) and Activity(s) to All Lines</b> button to apply the information to all requisition lines.</p>



[Favorites](#) | [Main Menu](#) | [eProcurement](#) | [Requisition](#)


**BERKELEY LAB - FMS**

All Search [Advanced Search](#)

---

**Checkout - Review and Submit**  
 Review the item information and submit the req for approval.

[My Preferences](#) [Requisition Settings](#)

**Requisition Summary**

Business Unit:  Lawrence Berkeley National Lab  
 \*Requester:  Ahearn, Kathryn A  
 \*Currency:

\*Deliver To Location:   
 \*SAS Approver:  EPANNIS  
 Shipping Method:  [Overnight applies to ALL Req items. Click to Learn More](#)

Requisition Name:

---

**Cart Summary: Total Amount 908.51 USD**  
[Expand lines to review shipping and accounting details](#)

Step	Action
5	Click on <b>Yes</b> to the confirmation warning message.

[Message](#)

Are you sure that you want to copy Line 1 Project(s) and Activity(s) to All Lines ? (26500,12)

You have elected to copy the Project(s) and Activity(s) you entered on Line 1 to all subsequent Lines. This will overwrite any Project and Activity combinations you have entered on any Lines other than Line 1. Are you sure that you want to do this?

Click on "Yes" to copy. Click on "No" to cancel copy.

Step	Action
6	The Project and Activity (and Work Order number, if applicable) is copied to all subsequent requisition lines.

2 Goldtouch V2 Fully Adjustable ANACAPA MICRO PRODUCTS, INC 3 Each 88.67 266.01

Shipping Line 1 \*Ship To 069-0150 Quantity 3  
 Address UC LAWRENCE BERKELEY LAB FOR THE US DEPT. OF ENERGY ONE CYCLOTRON ROAD, BLDG. 69 BERKELEY, CA 94720 Price 88.67  
 Attention To Ahearn, Kathryn A

Accounting Lines \*Distribute By Qty \*Liquidate By Amt

Accounting Lines Personalize | Find | View All | First 1 of 1 Last

Quantity	PC Bus Unit	Project	Activity	Percent
3	LBNL	100881	002	100.0000

3 Goldtouch Go! keyboard ANACAPA MICRO PRODUCTS, INC 3 Each 78.03 234.09

Shipping Line 1 \*Ship To 069-0150 Quantity 3  
 Address UC LAWRENCE BERKELEY LAB FOR THE US DEPT. OF ENERGY ONE CYCLOTRON ROAD, BLDG. 69 BERKELEY, CA 94720 Price 78.03  
 Attention To Ahearn, Kathryn A

Accounting Lines \*Distribute By Qty \*Liquidate By Amt

Accounting Lines Personalize | Find | View All | First 1 of 1 Last

Quantity	PC Bus Unit	Project	Activity	Percent
3	LBNL	100881	002	100.0000

Note: Project(s) and Activity(s) cannot copy if Line 1 has more than one Qty. distribution (split between multiple Projects / Activities). The following message will display if this is the case.

Message

Are you sure that you want to Copy Project and Activity to all lines ? (28500,12)

You have elected to copy the project ID(s) and activity ID(s) you entered on the first line to all subsequent lines. This will overwrite any Project ID/Activity ID combinations you have entered on any lines other than line 1. Are you sure that you want to do this? Click [Yes] to confirm the copying and [No] to cancel copying.

If you wish to proceed and copy the Project(s) and Activity(s) to all lines, click on the **Yes** button.

If you wish to cancel this action, click on the **No** button.

To distribute the Project(s) and Activity(s) you will need to change the Distribute By from “Qty” to “Amt”, then click on the **Copy Line 1 Project(s) and Activity(s) to All Lines** button (see Section [5.2.3.1 Distribute By Amount \[Percentage\]](#))

## 5.1.5 Confirm Requester

The **Requester** defaults to the name of the order preparer. If the preparer is not the requester, the preparer can use the magnifying glass / lookup icon next to the field to select the name of the requester.

## 5.1.6 Confirm Deliver to Location

The **Deliver to Location** defaults to your directory location. If goods are to be delivered to a different Laboratory building and room, you must change the Deliver to Location. You can use the magnifying glass / lookup icon next to the Deliver to Location field to find valid Laboratory locations.

The screenshot shows the Berkeley Lab FMS Requisition system interface. The main screen is titled "Checkout - Review and Submit" and displays a requisition summary for "Lawrence Berkeley National Lab". The "Deliver To Location" field is highlighted with a red box and contains the value "S71-0151H". A "Look Up Deliver To Location" popup window is open, showing a search results table with columns for Location Code and Description. The popup also includes fields for SetID, Location Code, and Description, and buttons for "Look Up", "Clear", and "Cancel".

Location Code	Description
000	SEE BODY OF ORDER
000-0001	NO DELIVERY
0000	Unknown
0000-0000	Building: 0000-0000
0000-FL00	Unknown
0000-FL1	BUILDING: 0000 FLOOR: 1
000045	BOWLIN EQUIPMENT
001	Donner Laboratory
001-0100	Building: 001-0100
001-0100A	Building: 001-0100A
001-0100B	Building: 001-0100B
001-0101	Office
001-0102	Office
001-0103	Office
001-0104	Women's Lavatory
001-0105A	Wet Laboratory
001-0105B	Office
001-0107	UC Research Lab
001-0108	Enclosed Office
001-0108A	Office
001-0109	UC Research Lab Service
001-0111	Custodian
001-0112	UC Research Office
001-0113	Dry Laboratory
001-0114	UC Research Lab Service
001-0116	Building: 001-0116

## 5.1.7 Select SAS Approver for High Value Orders

If the SAS Approver box is displayed, enter an SAS Approver from your division with sufficient dollar authority to cover the requisition total amount. Specific information regarding Approvals/Workflow is provided on the Procurement eBuy website under the heading [eBuy Roles](#).

Note: The Approver cannot be the Requester.



You can use the magnifying glass / lookup icon next to the SAS Approver field to look up the SAS approver.

The screenshot shows the 'Checkout - Review and Submit' page in the Berkeley Lab FMS system. The 'Requisition Summary' section includes fields for Business Unit (LBNL), Requester (KAAHEARN), Currency (USD), Deliver To Location (971-0151H), and SAS Approver. The 'SAS Approver' field is highlighted with a red box. A 'Look Up SAS Approver' dialog box is open, showing search criteria and a list of search results.

User ID	Name	Authorization Amount	Division
RJABERGEL	Abergel,Rebecca J	5000	CH
DACEVEDO	Acevedo,David	5000	BE
PDADAMS	Adams,Paul D	100000	MB
DAAGARWAL	Agarwal,Deborah A	10000	CR
JWAGER	Ager,Joel W	5000	MS
U6HMED	Ahmed,Muhammad	5000	CH

### 5.1.8 Select Shipping Method

Optionally, you can change the Shipping Method from the default Standard to Overnight, only if you require expedited delivery. Make the selection from the drop-down menu.

Note: The shipping method you select pertains to all of the items in that order. In addition, overnight shipping incurs additional costs. Therefore, if you require overnight shipping on only a portion of your items, place a separate order for those items and choose the overnight shipping method for that order when you complete the order in FMS.



Favorites | Main Menu | eProcurement | Requisition

**BERKELEY LAB - FMS** All Search Advanced Search

**Checkout - Review and Submit**  
Review the item information and submit the req for approval. [My Preferences](#) [Requisition Settings](#)

**Requisition Summary**

Business Unit: LBNL Lawrence Berkeley National Lab  
 \*Requester: KAAHEARN Ahearn, Kathryn A  
 \*Currency: USD  
 \*Deliver To Location: 971-0151H  
 \*SAS Approver: Annis, Edna P EPANNIS  
 Requisition Name:

Shipping Method: Standard (dropdown menu open showing Overnight and Standard options)  
 Overnight applies to ALL Req items. Click to Learn More

Cart Summary: Total Amount 908.51 USD  
 Expand lines to review shipping and accounting details

**Requisition Lines**

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Delete
1	Extreme Standing Mat, Medium		PACIFIC OFFICE SOLUTIONS	1	CT	408.41	408.41	
Shipping Line 1			*Ship To: 069-0150 Address: UC LAWRENCE BERKELEY LAB FOR THE US DEPT. OF ENERGY ONE CYCLOTRON ROAD, BLDG. 69 BERKELEY, CA 94720	Quantity: 1		Price: 408.41		

### 5.1.9 Name Your Requisition (Optional)

The Requisition Name field can be used to help you identify the requisition. If left blank, the Requisition number, instead of the name you enter in this field, is displayed on the Manage Requisitions screen and other reports.

Favorites | Main Menu | eProcurement | Requisition

**BERKELEY LAB - FMS** All Search Advanced Search

**Checkout - Review and Submit**  
Review the item information and submit the req for approval. [My Preferences](#) [Requisition Settings](#)

**Requisition Summary**

Business Unit: LBNL Lawrence Berkeley National Lab  
 \*Requester: KAAHEARN Ahearn, Kathryn A  
 \*Currency: USD  
 \*Deliver To Location: 971-0151H  
 \*SAS Approver: Annis, Edna P EPANNIS  
 Requisition Name:

Shipping Method: Standard  
 Overnight applies to ALL Req items. Click to Learn More

Cart Summary: Total Amount 908.51 USD  
 Expand lines to review shipping and accounting details

[Copy Line 1 Project\(s\) and Activity\(s\) to All Lines](#) [Add More Items](#)

### 5.2 Set Options for Order Lines

Here you can add and change information for each requisition line.

Expand lines to review shipping and accounting details Copy Line 1 Project(s) and Activity(s) to All Lines Add More Items

**Requisition Lines**

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Delete
1	Extreme Standing Mat, Medium,		PACIFIC OFFICE SOLUTIONS	1	CT	408.41	408.41	

Shipping Line 1

\*Ship To: 069-0150

Address: UC LAWRENCE BERKELEY LAB FOR THE US DEPT. OF ENERGY ONE CYCLOTRON ROAD, BLDG. 69 BERKELEY, CA 94720

Attention To: Ahearn, Kathryn A

Accounting Lines

\*Distribute By: Qty  \*Liquidate By: Amt

**Accounting Lines** Personalize | Find | View All | First 1 of 1 Last

Quantity	PC Bus Unit	Project	Activity	Percent
1	LBNL	100881	002	100.0000

### 5.2.1 Confirm Ship To / Attention To

You can update who the package is to be delivered to in the Attention To field and also the Ship to Location. By selecting the magnifying glass / lookup icon, you can choose Will Call or one of four Ship to Locations 1) LBNL Main Receiving, 2) Metal Stores Building 79, 3) JGI Receiving, or 4) eBuy Brookhaven Laboratory. (NO DELIVERY is not applicable).

Cart Summary: Total Amount 908.51 USD

Expand lines to review shipping and accounting details Copy Line 1 Project(s) and Activity(s) to All Lines Add More Items

**Requisition Lines**

Line	Description	Item ID	Supplier	Quantity	UOM	Price
1	Extreme Standing Mat, Medium,		PACIFIC OFFICE SOLUTIONS	1	CT	

Shipping Line 1

\*Ship To: 069-0150

Address: UC LAWRENCE BERKELEY LAB FOR THE US DEPT. OF ENERGY ONE CYCLOTRON ROAD, BLDG. 69 BERKELEY, CA 94720

Attention To: Ahearn, Kathryn A

Accounting Lines

\*Distribute By: Qty  \*Liquidate By: Amt

**Accounting Lines** Personalize | Find | View All | First 1 of 1 Last

Quantity	PC Bus Unit	Project	Activity	Percent
1	LBNL	100881	002	

**Look Up Ship To**

SetID:  SHARE

Ship To Location:  begins with

Description:  begins with

Search Results

View 100 First 1-7 of 7 Last

Ship To Location	Description
000-0001	NO DELIVERY
069	WILL CALL-BUILDING 069
069-0150	LBNL MAIN RECEIVING
079-0101	METAL STORES B79
400	JGI RECEIVING
943	LBNL COMPUTING CTR - OAKLAND
BNNL	eBuy-BROOKHAVEN LABORATORY

## 5.2.2 Add Project ID / Activity ID / Work Order Number

Note: If the order is for goods or services on a Maximo Work Order, you must enter the Work Order number in addition to the Project and Activity (see Step 3 below).



Before preparing the order, if you only know the Maximo Work Order number, you must first log into Maximo and look up the Work Order to determine the Project and Activity associated with that Work Order.

Step	Action
1	Enter the Project ID that is funding the the purchase for each accounting line. You can use the magnifying glass / lookup icon to help locate it.

The screenshot shows the 'Accounting Lines' section of a Maximo interface. A dialog box titled 'Look Up Project' is open, allowing the user to search for a project. The search criteria are: Project: begins with 100881, and Description: begins with. The search results table shows one result: Project 100881, Description CF\_Procurement & Property. The background shows an accounting line for ANACAPA MICRO PRODUCTS, INC with a quantity of 3 and a unit of Each.

Step	Action
2	Enter the Activity associated with the Project for each accounting line. You can use the magnifying glass / lookup icon to select to help locate it.

Address UC LAWRENCE BERKELEY LAB  
FOR THE US DEPT. OF ENERGY  
ONE CYCLOTRON ROAD, BLDG.  
69  
BERKELEY, CA 94720

Attention To Ahearn, Kathryn A

Accounting Lines

\*Distribute By Qty

Accounting Lines

Quantity	PC Bus Unit	Project
5	LBNL	100881

se 4 ANACAPA MICRO PRODUCTS, INC 5 E

\*Ship To 069-0150

Address UC LAWRENCE BERKELEY LAB  
FOR THE US DEPT. OF ENERGY  
ONE CYCLOTRON ROAD, BLDG.  
69  
BERKELEY, CA 94720

Attention To Ahearn, Kathryn A

Accounting Lines

\*Distribute By Qty

Price 94.15

Look Up Activity

Activity: begins with

WBS ID: begins with

Look Up Clear Cancel Basic Lookup

Search Results

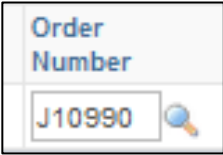
View 100 First 1-12 of 12 Last

Row Number	WBS ID	Activity Description
1	1 001	Procurement Office
2	2 002	Business Assurance
3	3 003	Construction
4	4 004	Goods_Research and Development
5	5 005	Technology
6	6 006	Strategic Solutions
7	7 007	Support & Services
8	8 008	Service Center
9	9 009	Procurement Incentives
10	10 010	Procurement Training
11	11 011	PCard Incentives
12	12 012	eBuy Incentives

Note: If you need assistance with which Project / Activity IDs to use, contact your Resource Analyst.





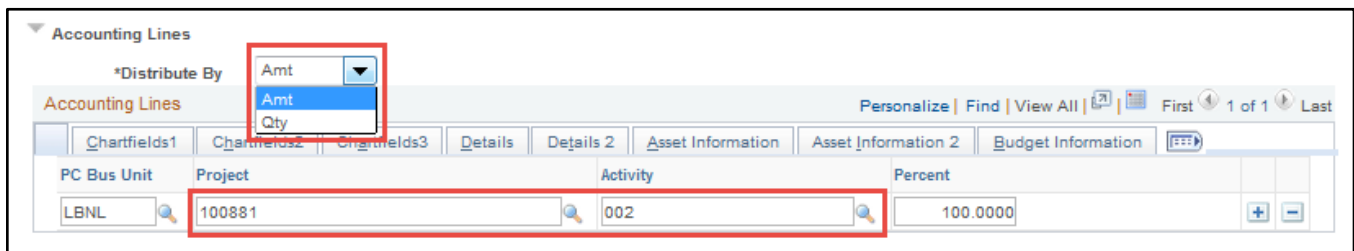
Step	Action	
3	If applicable, enter the Work Order Number in the Order Number field, or use the magnifying glass / lookup icon to select the Work Order Number.	

### 5.2.3 Distribute Charges by Amount or Quantity

If you would like to distribute charges between multiple Projects and Activities, by amount or by quantity, use the following steps.

#### 5.2.3.1 Distribute By Amount (Percentage)

Step	Action
1	<p>Enter the first Project / Activity (and Work Order number, if applicable) that you wish to charge to. You can use the magnifying glass / lookup icon to make your selection.</p> <p>Select Amount (Amt.) from the Distribute by drop-down menu.</p> <p>Note: Quantity is the default.</p>



The screenshot shows the 'Accounting Lines' interface. At the top, there is a dropdown menu labeled '\*Distribute By' with 'Amt' selected. Below this, there are several tabs: 'Chartfields1', 'Chartfields2', 'Chartfields3', 'Details', 'Details 2', 'Asset Information', 'Asset Information 2', and 'Budget Information'. The main area contains a table with columns: 'PC Bus Unit', 'Project', 'Activity', and 'Percent'. The 'PC Bus Unit' field contains 'LBNL'. The 'Project' field contains '100881'. The 'Activity' field contains '002'. The 'Percent' field contains '100.0000'. There are also '+' and '-' buttons next to the 'Percent' field.

Step	Action
2	<p>Enter the percentage you wish to apply to the first Project and Activity combination.</p> <p>Click the <b>plus</b> icon.</p> <p>A new line will be added distributing the remaining percentage amount to Line 2.</p> <p>You can repeat this step to distribute the percentages further.</p> <p>Note: All accounting lines must add up to 100 percent.</p>

### Initial Screen

The screenshot shows the 'Accounting Lines' interface. At the top, there are dropdown menus for '\*Distribute By' (set to 'Amt') and '\*Liquidate By' (set to 'Amt'). Below these are navigation options: 'Personalize | Find | View All | [grid icon] | First 1 of 1 Last'. A series of tabs includes 'Chartfields1', 'Chartfields2', 'Chartfields3', 'Details', 'Details 2', 'Asset Information', 'Asset Information 2', and 'Budget Information'. The main table has columns for 'PC Bus Unit', 'Project', 'Activity', and 'Percent'. The first row contains 'LBNL', '100881', '002', and '50.0000'. A red box highlights the '50.0000' value and the '+' icon to its right.

### 1st Distribution Result

This screenshot shows the 'Accounting Lines' interface after the first distribution. The navigation bar now shows '1-2 of 2'. The table has two rows. The first row is identical to the previous screenshot: 'LBNL', '100881', '002', '50.0000'. The second row has 'LBNL' in the 'PC Bus Unit' column, and empty fields for 'Project' and 'Activity', with '50.0000' in the 'Percent' column. A red box highlights the '50.0000' value in the second row.

### 2nd Distribution Result

This screenshot shows the 'Accounting Lines' interface after the second distribution. The navigation bar now shows '1-3 of 3'. The table has three rows. The first row is 'LBNL', '100881', '002', '50.0000'. The second row is 'LBNL', empty, empty, '25.0000'. The third row is 'LBNL', empty, empty, '25.0000'. A red box highlights the '25.0000' values in the second and third rows.

Step	Action
3	Update the Project and Activity (and Work Order number, if applicable) in the new entry fields.

Accounting Lines

\*Distribute By  \*Liquidate By

Accounting Lines Personalize | Find | View All | | | First 1-3 of 3 Last

Chartfields1 Chartfields2 Chartfields3 Details Details 2 Asset Information Asset Information 2 Budget Information

PC Bus Unit	Project	Activity	Percent		
<input type="text" value="LBNL"/>	<input type="text" value="100881"/>	<input type="text" value="002"/>	<input type="text" value="50.0000"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="LBNL"/>	<input type="text" value="100881"/>	<input type="text" value="001"/>	<input type="text" value="25.0000"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="LBNL"/>	<input type="text" value="100881"/>	<input type="text" value="007"/>	<input type="text" value="25.0000"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Step	Action
4	If you wish to apply the information to all requisition lines, click the <b>Copy Line 1 Project(s) and Activity(s) to All Lines</b> button.

Favorites | Main Menu | eProcurement | Requisition

**BERKELEY LAB - FMS**  Search Advanced Search

**Checkout - Review and Submit**  
Review the item information and submit the req for approval. My Preferences Requisition Settings

Requisition Summary

Business Unit  Lawrence Berkeley National Lab Requisition Name

\*Requester  Ahearn, Kathryn A

\*Currency  \*Deliver To Location

\*SAS Approver  EPANNIS

Shipping Method  Overnight applies to ALL Req items. Click to Learn More

Cart Summary: Total Amount 908.51 USD

Expand lines to review shipping and accounting details

Step	Action
5	Click on <b>Yes</b> to the confirmation warning message.

Message

Are you sure that you want to copy Line 1 Project(s) and Activity(s) to All Lines ? (26500,12)

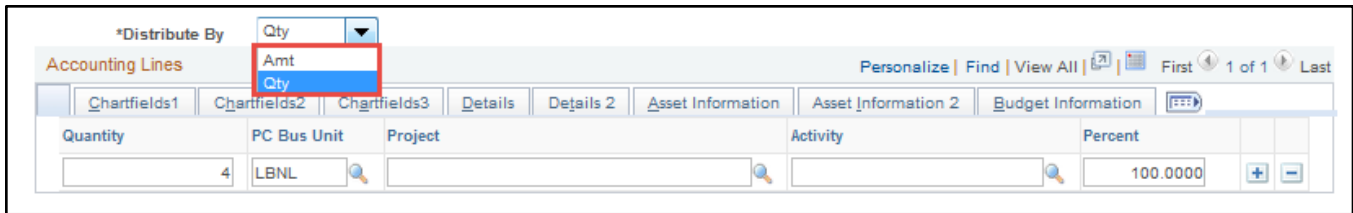
You have elected to copy the Project(s) and Activity(s) you entered on Line 1 to all subsequent Lines. This will overwrite any Project and Activity combinations you have entered on any Lines other than Line 1. Are you sure that you want to do this?

Click on "Yes" to copy. Click on "No" to cancel copy.

Step	Action
6	The Project and Activity (and Work Order number, if applicable) is copied to all requisition lines.

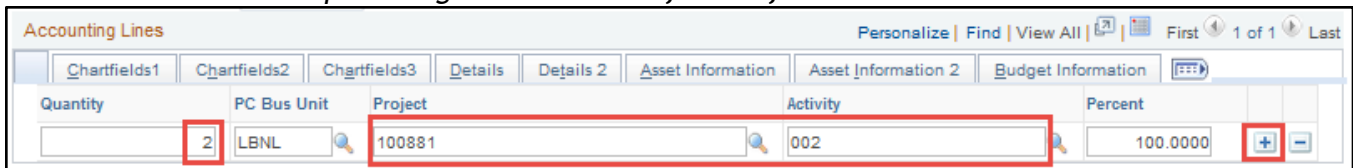
5.2.3.2 Distribute by Quantity (Number of Items or Percentage)

Step	Action
1	Select Quantity (Qty.) from the <b>Distribute By</b> drop-down menu.  Note: Quantity is the default.

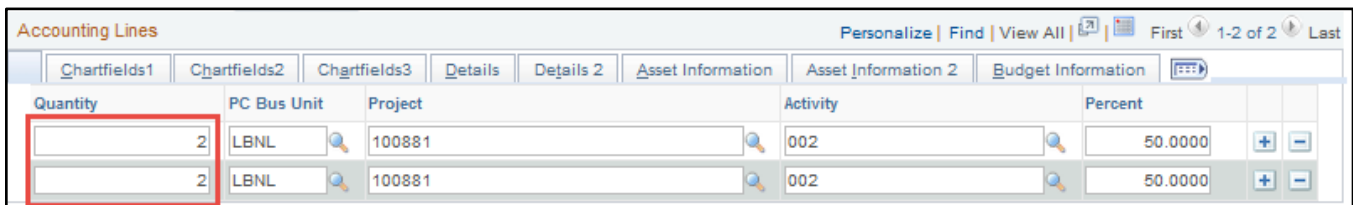


Step	Action
2	Enter the first Project and Activity in the Project / Activity fields. You can use the magnifying glass / lookup icon to make your selections.  Then, reduce the first Project's Accounting line to either the percentage or number of items you want to apply to that Project and Activity.
3	Click the <b>plus icon</b> to the right of the Accounting Line. This will add a new row with the balance of the requisition line total.

*Action: The below example changes the number of items from 4 to 2.*



**Result**



Step	Action
------	--------

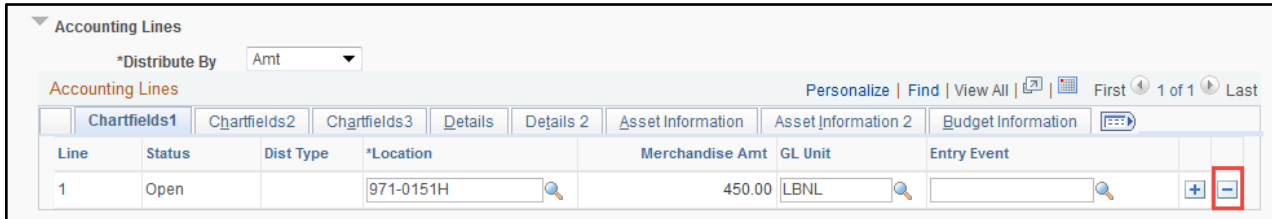
4 You can repeat the previous steps to distribute the quantities further. Then, enter the Project and Activity for each newly added line.

The screenshot shows the 'Accounting Lines' interface with a table containing three rows. The columns are Quantity, PC Bus Unit, Project, Activity, and Percent. Red boxes highlight the values 2, 1, 1 in the Quantity column and 002, 005, 008 in the Activity column.

Quantity	PC Bus Unit	Project	Activity	Percent		
2	LBNL	100881	002	50.0000	+	-
1	LBNL	100881	005	25.0000	+	-
1	LBNL	100881	008	25.0000	+	-

## 5.2.4 Delete Items

To delete an Accounting Line, click the blue minus icon to the right of the line.

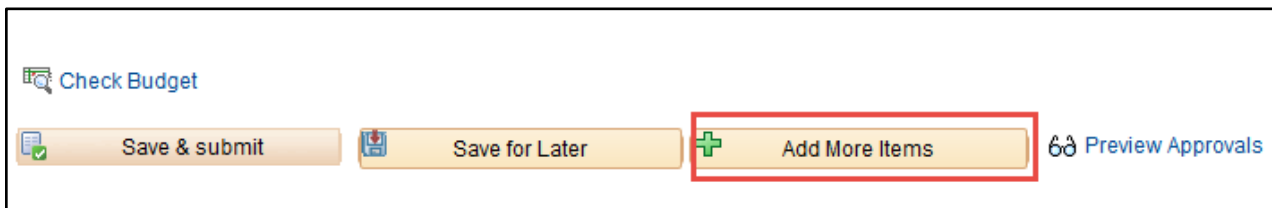


The screenshot shows a table titled "Accounting Lines" with a dropdown menu for "\*Distribute By" set to "Amt". The table has several tabs: "Chartfields1", "Chartfields2", "Chartfields3", "Details", "Details 2", "Asset Information", "Asset Information 2", and "Budget Information". The table columns are: "Line", "Status", "Dist Type", "\*Location", "Merchandise Amt", "GL Unit", and "Entry Event". The first row contains the following data: Line 1, Status Open, Dist Type (blank), \*Location 971-0151H, Merchandise Amt 450.00, GL Unit LBNL, and Entry Event (blank). A red box highlights the minus icon in the rightmost column of the first row.

Line	Status	Dist Type	*Location	Merchandise Amt	GL Unit	Entry Event
1	Open		971-0151H	450.00	LBNL	

## 5.3 Add More Items

Before submitting your requisition, you have another opportunity to add more items by clicking the **Add More Items** button.



You will be returned to the Create Requisition screen, where you can then return to the Marketplace and choose additional items to purchase.

Favorites ▾ Main Menu ▾ > eProcurement ▾ > Requisition

**Edit Requisition** ?

Welcome **Ahearn, Kathryn A** [Home](#) [My Preferences](#) [Requisition Settings](#) | [2 Lines](#) [Checkout](#)

Request Options ▾ Search All  Search [Advanced Search](#)

Enter search criteria or select from the menu on the right to begin creating your requisition.

- Catalog**  
Browse Catalogs  
LBNL Item Cat
- Special Requests**  
Create a non-catalog request
- Templates**  
Browse Company and Personal Templates
- External Catalogs**  
Browse Supplier Website Items
- eBuy**  
Shop Supplier Catalogs  
GSS Scientific Catalog  
All Other Products
- Forms**  
Create and Submit Forms
- ePro Services**  
Request Services  
Fixed Cost Service  
Variable Cost Service  
Time and Materials
- Create Requisition**  
Create a Requisition
- Favorites**  
Browse Favorite Items and Services
- Recently Ordered**  
View recently ordered items and services  
Strengths Based Leadership</...

## 5.4 Enter Comments to Approver

Here you have the option to enter comments to be seen by the requisition approver. The **Comments to Approver** area is visible on the requisition Approver's screen and lets you communicate comments and justifications to the Approver for the items you are purchasing.

Note: Do not use the Requisition comments field. Comments will not be seen by the supplier.



**Requisition Comments**

Enter requisition comments

Send to Supplier  Show at Receipt  Shown at Voucher

**Comments to Approver**

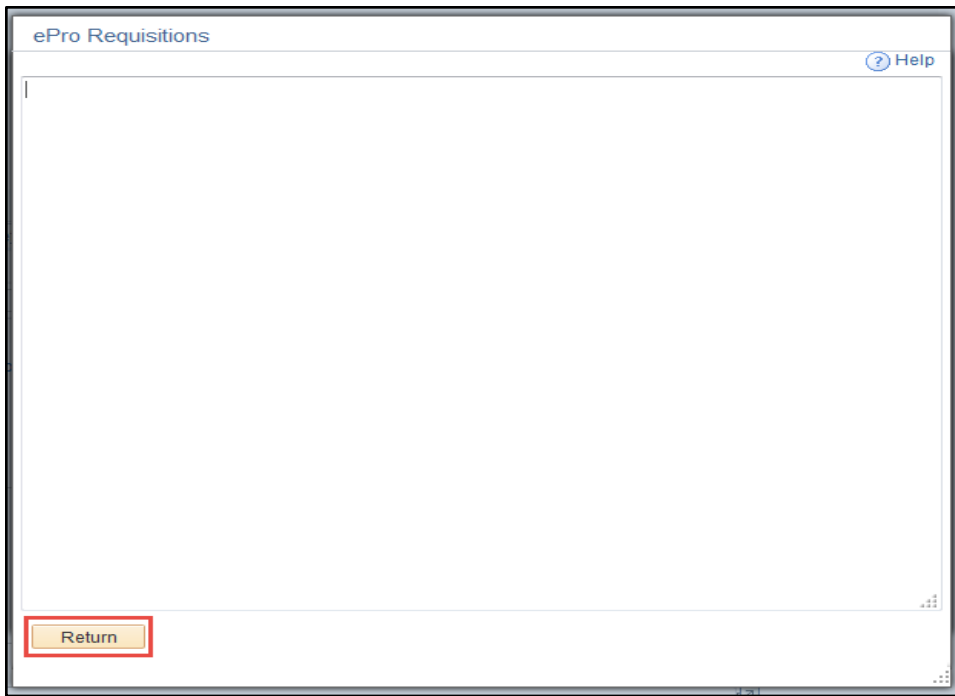
Enter Comments Here

[Check Budget](#)

[Save & submit](#) [Save for Later](#) [Add More Items](#) [Preview Approvals](#)

If you wish to expand the comments field, click on the arrow at the top right of the entry field. Enter your comments and click **Return** when done.





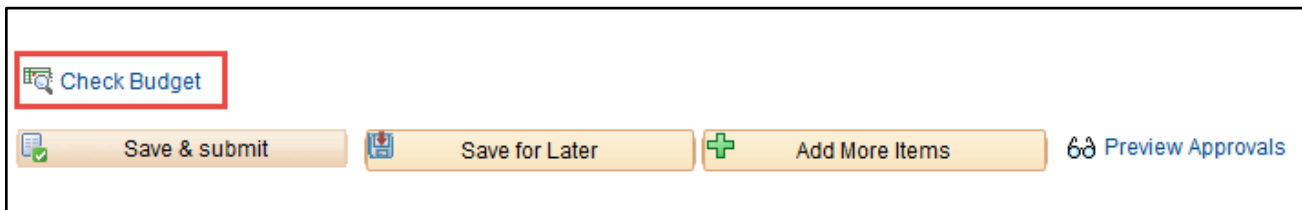
## 5.5 Run Budget Check to Avoid Delay

Before saving and submitting your requisition you need to perform a budget check.

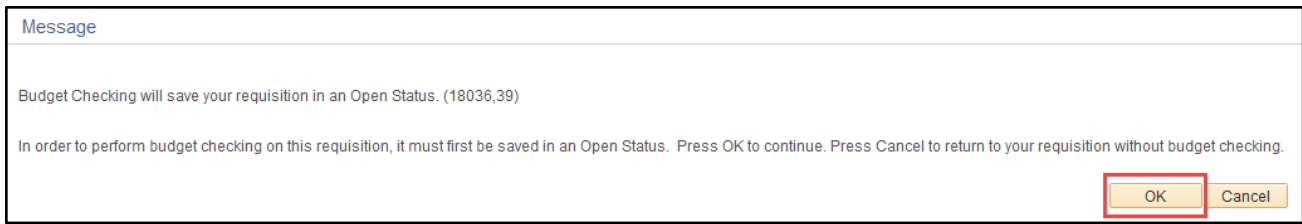
Note: If you **do not** perform a Budget Check, your order may be delayed.



Step	Action
1	Click the <b>Check Budget</b> link.

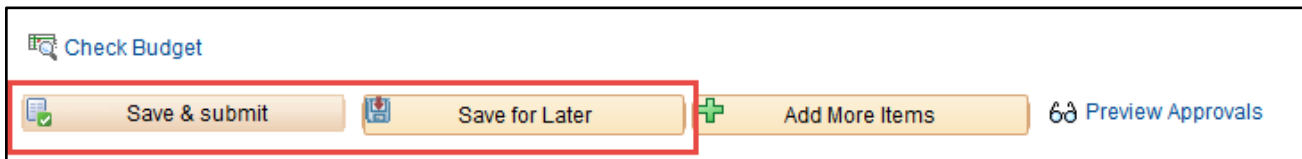


Step	Action
2	When the message pops up on the screen, click <b>OK</b> .



## 5.6 Save & Submit or Save for Later

After you have performed the Budget Check, you must click either the **Save & Submit** or **Save for Later** button.



- If you are not ready to save and submit your requisition, click the **Save for Later** button to save the requisition and work on it later.
- If you would like to see who will be asked to approve the requisition, click the **Preview Approvals** icon.
- The Preview Approvals window will show whether approvals are needed, and if so, who will be approving the order.
- If you *are* ready to save and submit your requisition and route it for approvals, click the **Save & Submit** button.

Note: You must click **Save for Later** prior to Preview Approvals, or you will see a warning message.



## 5.7 Reviewing System Confirmation

The Confirmation screen will appear, confirming that your requisition has been submitted. If no approvals are required, the order will be submitted to the supplier. If approvals *are* required, routing for approvals will take place first.

**Confirmation**

Your requisition has been submitted.

Requested For	Ahearn, Kathryn A	Number of Lines	2
Requisition Name	1000030054	Total Amount	920.75 USD
Requisition ID	1000030054		
Business Unit	LBNL		
Status	Pending		
Budget Status	Valid		

[View printable version](#)
[Edit This Requisition](#)
[Check Budget](#)
[Pre-Check Budget](#)

**SAS Dollar Amount Approval**

▼ **Requisition 1000030054: Pending** [Start New Path](#)  
 SAS Dollar Amount Approval  
 Pending  
 Annis, Edna P  
 LBNL Requisition Approver(SAS) [+](#)

[Apply Approval Changes](#)  
[Create New Requisition](#)
[Manage Requisitions](#)

- Use the unique **Requisition ID** number for queries and reports.
- A “Pending” status above the Approver’s name means that the Approver was sent an email to approve the requisition. “Not Routed” means that the Approver was not yet asked to approve the requisition. After a requisition is approved, it is sent to the next Approver if applicable, and the next Approver’s status changes to “Pending.” When an Approver approves a requisition, their box changes from blue to green. When they deny a requisition, the box turns red and the requisition is not routed to the next Approver.
- If the Requisition Approver denies the requisition, the Requester will receive an email.
- Notice that the Budget Status says “Valid.” This means that the requisition is available for further processing.
- You can click the **View Printable Version** link to see a printable requisition document with all lines and comments.
- Click the **Edit This Requisition** link to make immediate changes to the requisition.

Note: If the Budget Status says “Error,” there may be a funding issue with your order. You will need to contact your Resource Analyst.



## 5.8 Manage Your Order

### 5.8.1 Manage Requisitions Screen

Step	Action
1	If you wish to see all of your orders and their statuses, you can do this in <b>Manage Requisitions</b> . There are two ways to access this page.
1a	Click <b>Manage Requisitions</b> at the bottom of the Requisition Confirmation page.

#### Confirmation

Your requisition has been submitted.

Requested For	Ahearn, Kathryn A	Number of Lines	2
Requisition Name	1000030054	Total Amount	920.75 USD
Requisition ID	1000030054		
Business Unit	LBNL		
Status	Pending		
Budget Status	Valid		

[View printable version](#)   [Edit This Requisition](#)   [Check Budget](#)   [Pre-Check Budget](#)

#### SAS Dollar Amount Approval

Requisition 1000030054: Pending [Start New Path](#)

SAS Dollar Amount Approval

Pending

Annis, Edna P  
LBNL Requisition Approver(SAS) [+](#)

[Apply Approval Changes](#)

[Create New Requisition](#)   [Manage Requisitions](#)

Step	Action
1b	<p>Alternately, you can do this from the Manage Requisitions page in FMS.</p> <p>Log into FMS and navigate to: <a href="#">Main Menu</a>   <a href="#">eProcurement</a>   <a href="#">Manage Requisitions</a></p>
2	<p>On the Manage Requisitions screen, search for the requisition you want to see by typing in the relevant information in the <b>Search Requisitions</b> area of the screen.</p> <p>Enter parameters like the following to match what you are trying to find:</p> <ul style="list-style-type: none"> <li>● Requester</li> <li>● Requisition</li> <li>● Requisition ID</li> </ul> <p>You may also enter a specific “Requisition ID” or “Requisition Name” in the respective fields and search for a particular requisition that way. For this to work properly:</p> <ul style="list-style-type: none"> <li>● <b>Date From</b> and <b>Date To</b> range must be broad enough to cover the period when the requisition was created.</li> <li>● <b>Requester</b> field must be blank when entering a Requisition ID or Requisition Name.</li> </ul> <p>A list of your requisitions will then be displayed.</p>

Step	Action
3	<p>You can optionally change the <b>Request State</b> from “All but Complete” to “Pending” to only see Requisitions waiting for Division approval(s).</p>

**Manage Requisitions**

Requisition Search

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit  Requisition Name

Requisition ID  Request State

Date From  Date To

Requester  Entered By

Budget Status

PO ID


[Show Advanced Search](#)

The Requester specified has no Requisitions.

[Create New Requisition](#) [Review Change Request](#) [Review](#) [Manage Receipts](#) [Requisition Report](#)

Step	Action
4	When the specific parameters have been entered for the search, click the <b>Search</b> button.

Note: The list of requisitions can contain up to 100 lines. If more lines need to be viewed, it is recommended that you narrow the search parameters.



### Manage Requisitions

Requisition Search

**Search Requisitions**

To locate requisitions, edit the criteria below and click the Search button.

Business Unit  Requisition Name

Requisition ID  Request State  Budget Status

Date From  Date To

Requester  Entered By  PO ID

[Show Advanced Search](#)

**Requisitions** [?](#)

To view the lifespan and line items for a requisition, click the Expand triangle icon.  
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total		
▶ 1000030122	1000030122	LBNL	06/18/2015	PO(s) Dispatched	Valid	108.00 USD	[Select Action]	Go
▶ 1000030121	1000030121	LBNL	06/18/2015	PO(s) Dispatched	Valid	108.00 USD	[Select Action]	Go
▶ 1000030080	1000030080	LBNL	06/10/2015	Open	Valid	459.54 USD	[Select Action]	Go
▶ 1000030075	1000030075	LBNL	06/09/2015	PO(s) Dispatched	Valid	108.00 USD	[Select Action]	Go
▶ 1000030074	1000030074	LBNL	06/08/2015	Pending	Valid	545.94 USD	[Select Action]	Go
▶ 1000030054	1000030054	LBNL	06/02/2015	Pending	Valid	920.75 USD	[Select Action]	Go

[Create New Requisition](#) [Review Change Request](#) [Review Change Tracking](#) [Manage Receipts](#) [Requisition Report](#)

Step	Action
5	You can click on the <b>Req ID</b> link to go to the Requisition Details screen, which lets you view details about the requisition, including its comments and attachments.

### Manage Requisitions

Requisition Search

**Search Requisitions**

To locate requisitions, edit the criteria below and click the Search button.

Business Unit  Requisition Name

Requisition ID  Request State  Budget Status

Date From  Date To

Requester  Entered By  PO ID

[Show Advanced Search](#)

**Requisitions** [?](#)

To view the lifespan and line items for a requisition, click the Expand triangle icon.  
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total		
▶ <b>1000030240</b>	1000030240	LBNL	07/20/2015	Approved	Valid	122.22 USD	[Select Action]	Go
▶ 1000030122	1000030122	LBNL	06/18/2015	PO(s) Dispatched	Valid	108.00 USD	[Select Action]	Go
▶ 1000030121	1000030121	LBNL	06/18/2015	PO(s) Dispatched	Valid	108.00 USD	[Select Action]	Go
▶ 1000030080	1000030080	LBNL	06/10/2015	Open	Valid	459.54 USD	[Select Action]	Go
▶ 1000030075	1000030075	LBNL	06/09/2015	PO(s) Dispatched	Valid	108.00 USD	[Select Action]	Go
▶ 1000030074	1000030074	LBNL	06/08/2015	Pending	Valid	545.94 USD	[Select Action]	Go
▶ 1000030054	1000030054	LBNL	06/02/2015	Pending	Valid	920.75 USD	[Select Action]	Go

[Create New Requisition](#) [Review Change Request](#) [Review Change Tracking](#) [Manage Receipts](#) [Requisition Report](#)

Step	Action

6	When you are done reviewing this screen, click the <b>Return to Manage Requisitions</b> link.
---	---

**Requisition Details**

Requisition Summary

Business Unit	LBNL	Buyer	eCommerce Buyer
Date	07/20/2015	Invoice Certifier	
Request State	Approved	Resource Analyst	
Requested For	KAAHEARN	SAS Approver	
Sole Source	No	Type of Service	
Requisition Name	1000030240	Deliver To Location	Building: 971-0151H
Requisition ID	1000030240	Pre-Encumbrance Balance	
Total Amount	122.22 USD		
			0.00 USD

Expand lines to review shipping and accounting details

**Requisition Lines**

Line	Item Description	Source Status	Amount Only	Qty	Price	Status	Total
▶ 1	Staples 30% Recycled 3-Hole ...	Available	No	2.0000 Ream	7.11000 USD	Approved	14.22
▶ 2	Strengths Based Leadership</>...	Available	No	5.0000 Each	21.60000 USD	Approved	108.00

[Return to Manage Requisitions](#)

Step	Action
7	Use the <b>Select Action</b> drop-down menu and <b>Go</b> button to see the View Print screen. It also has links to approval status.



### Manage Requisitions

Requisition Search

**Search Requisitions**

To locate requisitions, edit the criteria below and click the Search button.

Business Unit	Requestion Name	Request State	Budget Status
<input type="text" value="LBNL"/>	<input type="text"/>	<input type="text" value="All but Complete"/>	<input type="text"/>
Requisition ID	Date From	Date To	Entered By
<input type="text"/>	<input type="text" value="06/01/2015"/>	<input type="text" value="07/09/2015"/>	<input type="text"/>
Requester	PO ID		
<input type="text" value="KAAHEARN"/>	<input type="text"/>		

**Requisitions**

To view the lifespan and line items for a requisition, click the Expand triangle icon.  
 To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
▶ 1000030122	1000030122	LBNL	06/18/2015	PO(s) Dispatched	Valid	108.00 USD	[Select Action] Go
▶ 1000030121	1000030121	LBNL	06/18/2015	PO(s) Dispatched	Valid	108.00 USD	[Select Action] Go
▶ 1000030080	1000030080	LBNL	06/10/2015	Open	Valid	459.54 USD	[Select Action] Go
▶ 1000030075	1000030075	LBNL	06/09/2015	PO(s) Dispatched	Valid	108.00 USD	[Select Action] Go
▶ 1000030074	1000030074	LBNL	06/08/2015	Pending	Valid	545.94 USD	[Select Action] Go
▶ 1000030054	1000030054	LBNL	06/02/2015	Pending	Valid	920.75 USD	[Select Action] Go

[Create New Requisition](#)
[Review Change Request](#)
[Review Change Tracking](#)
[Manage Receipts](#)
[Requisition Report](#)

### 5.8.2 Requisition Lifespan

When you expand the requisition line, the Requisition Lifespan ribbon appears. This is a row of icons. You can click on an icon to view details of each transaction that occurs over the requisition's life. Process icons that are in color can be clicked for further details. Processes represented by black and white icons have not taken place, so those icons are not clickable.

**Manage Requisitions**

Requisition Search | Keyword Search

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: LBNL Requisition Name: \_\_\_\_\_  
 Requisition ID: \_\_\_\_\_ Request State: All but Complete Budget Status: \_\_\_\_\_  
 Date From: 06/01/2015 Date To: 07/20/2015  
 Requester: KAAHEARN Entered By: \_\_\_\_\_ PO ID: \_\_\_\_\_

Search Clear Show Advanced Search

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon.  
 To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total
1000030240	1000030240	LBNL	07/20/2015	Approved	Valid	122.22 USD [Select Action]

Requester: Ahearn, Kathryn A Entered By: Ahearn, Kathryn A Priority: Medium  
 0.00 USD

Request Lifespan: Requisition → Approvals → LBNL Procurement Status → Inventory → Purchase Orders → Change Request → Receiving → Returns → Invoice → Payment

Request Lifespan: Line Information

Line	Description	Status	Price	Quantity	UOM	Supplier
1	Staples 30% Recycled 3-Hole ...	Approved	7.11000	2.0000	RM	PACIFIC OFFICE SOLUTIONS
2	Strengths Based Leadership</...>	Approved	21.60000	5.0000	EA	COMPLETE BOOK AND MEDIA SUPPLY LLC

1000030122 1000030122 LBNL 06/18/2015 PO(s) Dispatched Valid 108.00 USD [Select Action] Go  
 1000030121 1000030121 LBNL 06/18/2015 PO(s) Dispatched Valid 108.00 USD [Select Action] Go  
 1000030080 1000030080 LBNL 06/10/2015 Open Valid 459.54 USD [Select Action] Go  
 1000030075 1000030075 LBNL 06/09/2015 PO(s) Dispatched Valid 108.00 USD [Select Action] Go  
 1000030074 1000030074 LBNL 06/08/2015 Pending Valid 545.94 USD [Select Action] Go  
 1000030054 1000030054 LBNL 06/02/2015 Pending Valid 920.75 USD [Select Action] Go

Create New Requisition Review Change Request Review Change Tracking Manage Receipts Requisition Report

- Requisition: Requisition detail
- Approvals: Requisition Approval status
- LBNL Procurement Status: Purchase Order Procurement status
- Inventory: Inventory List (not used)
- Purchase Orders: Purchase Order details
- Change Request: PO Modification Request (not used)
- Receiving: Receiving status
- Returns: Returns status
- Invoice: Invoice records
- Payment: Payment history

### 5.8.2.1 Is My Requisition Approved and Who Are the Approvers?

Requisition Preparers should monitor the status of “Open” and “Pending” Request-State requisitions to make sure that approvals are progressing.

Note: If your order was submitted to two different suppliers, you’ll see each supplier listed under the Supplier field. A separate unique purchase order will be issued to each supplier (e.g., CDW-G by Anacapa, MSC by GSS, Newark by GSS).



Request Lifespan:

Line Information		Personalize   Find     First 1-2 of 2 Last						
Line	Description	Status	Price		Quantity	UOM	Supplier	
1	Staples 30% Recycled 3-Hole ...	Approved	7.11000	USD	2.0000	RM	PACIFIC OFFICE SOLUTIONS	✘
2	Strengths Based Leadership</...>	Approved	21.60000	USD	5.0000	EA	COMPLETE BOOK AND MEDIA SUPPLY LLC	✘

Notes:

- A requisition in an “Open” state eventually needs to have its **Save & Submit** button pressed. Otherwise, it will not be processed further.
- A requisition in a “Pending” state for a long period of time may have an Approver who is not aware of the requisition and has therefore not taken action.
- If the status is shown as “Denial” and it is due to an incorrect SAS Approver, edit the requisition and update the SAS Approver to the correct approver, then click on **Preview Approvals** before clicking on **Save & Submit**.



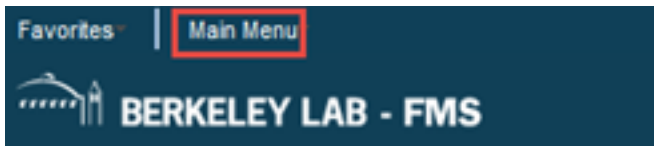
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## 6 SETTINGS PREFERENCES

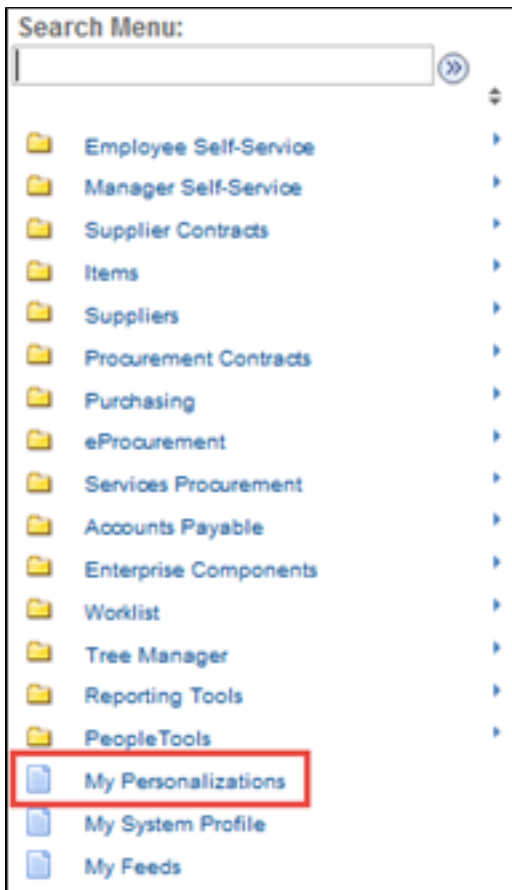
### 6.1 FMS Autocomplete Personalization

The autocomplete function in FMS can be enabled/disabled for lookup fields. When enabled, the system will suggest appropriate values as you type.

The system default is to autocomplete. To disable this function, click the Main Menu link at the top of the FMS screen.



In the window that opens, click the My Personalizations link.



In the next window that opens, click the Personalize Navigation Personalizations link.

**Personalizations**  
Ahearn, Kathryn A

Personalized settings are in effect.  
Depending on the settings that you changed, you might need to sign in again to see the changes.

Personalize User Option by Category

- Personalize General Options
- Personalize Regional Settings
- Personalize System & Application Messages
- Personalize Navigation Personalizations**

Restore Defaults

A list of Personalization options will display. To disable the autocomplete function, select **No** from the Override Value drop-down menu, then click **OK**. The next time you log in to FMS, autocomplete will be turned off.

Option Category: Navigation Personalizations

Personalization Option	Default Value	Override Value	
Drop down Menu Sort Order	None		Explain
Automatic Menu Collapse	No		Explain
Mouse over popup event	Yes		Explain
Open new browser window	No		Explain
Tab over Calendar Button	No		Explain
Tab over Grid Tabs	No		Explain
Tab over Header Icons	No		Explain
Tab over Lookup Button	No		Explain
Tab over Navigation Bar	No		Explain
Tab over Browser Elements	No		Explain
Tab over Page Links	No		Explain
Tab over Related Page Links	No		Explain
Tab over Toolbar	No		Explain
Autocomplete	Yes	No	Explain

Restore Category Defaults

OK Cancel

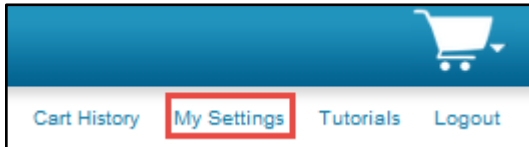
## 6.2 My Settings in the Marketplace

The Marketplace allows you to configure your personal preferences for search, menu, and default settings.

Note: Personalization may reduce eBay Marketplace functionality.



Use the **My Settings** option to define personal preferences for the Marketplace.



[Update](#) [Reset](#)

### Preference

**Search Types**

Product Keyword    Supplier Part #    Manufacturer Part #    Search Internal Catalogs

**Menu Settings**

e-Forms    Quick Order    Saved Search    Packages    Saved Carts    vQuote    vAnalytics

**Default Settings**

Default Search Type:

Default Search Results View:

Default Language :

Default Search Page View:

Default Search Results View:

My Timezone:

Enable Search Ahead:

Export to Excel:

At the Preferences page, you can configure the following:

### 6.2.1 Search Types

Allows you to control the search types to select from when performing a search.

### 6.2.2 Menu Settings

Allows you to hide or display various menu options and buttons in the Marketplace.

### 6.2.3 Default Settings

Allows you to configure the default parameters for:

- Search type
- Search results view
- Language
- Search page view
- Timezone
- Enable search ahead
- Export to Excel

Step	Action
1	Specify the desired preferences for the Marketplace.
2	Click <b>Update</b> to save the changes. A confirmation will display indicating the preference(s) have been updated.  <div style="border: 1px solid green; padding: 5px; display: inline-block;">Your preference has been updated.</div>
3	Click <b>Reset</b> to discard the changes and reset the page.

Update
Reset

#### Preference

**Search Types**

Product Keyword  
  Supplier Part #  
  Manufacturer Part #  
  Search Internal Catalogs

**Menu Settings**

e-Forms  
  Quick Order  
  Saved Search  
  Packages  
  Saved Carts  
  vQuote  
  vAnalytics

**Default Settings**

Default Search Type:

Default Search Results View:

Default Language :

Default Search Page View:

Default Search Results View:

My Timezone:

Enable Search Ahead:

Export to Excel: