

ESM Purchase[™] Order Summary, Extracts and Dashboard Reference Guide



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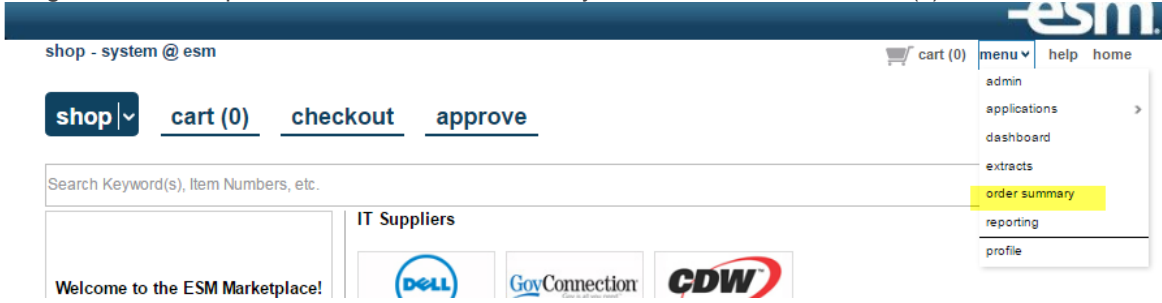
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ESM Purchase™ Order Summary, Extracts and Dashboard

This document provides a condensed overview of Order Summary, Extracts and the Dashboard. It will demonstrate with short text descriptions supported by screen shots for each step explained.

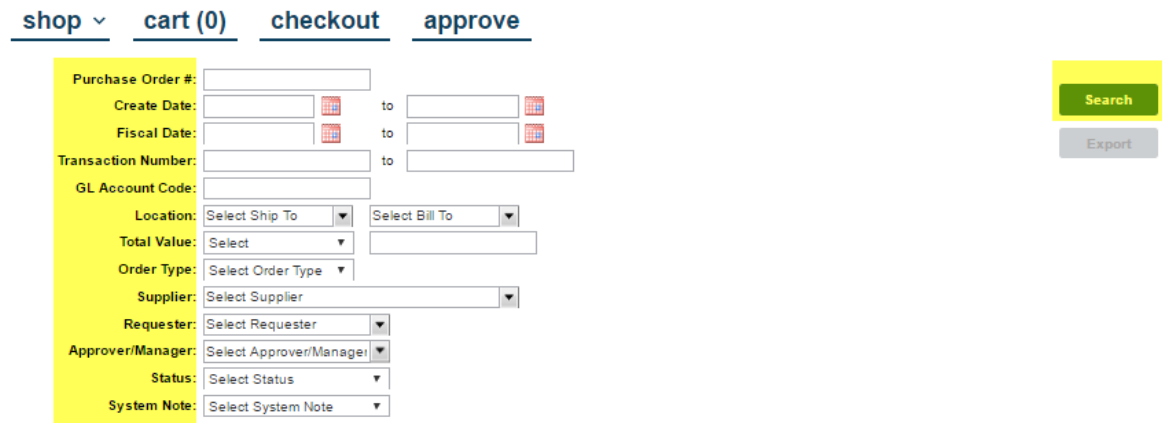
Order Summary

Using the Menu drop-down, select Order Summary to search for a transaction(s).



Please Note: Order Summary access is a privilege assigned by System Administrators.

Enter at least one search criteria and select Search to generate results. The selection of multiple search criteria will filter results.



Users can select the caret to change the order of the search results based on the column selected.

shop ▾ cart (0) checkout approve

Purchase Order #:
 Create Date: to
 Fiscal Date: to
 Transaction Number: to
 GL Account Code:
 Location: Select Ship To ▾ Select Bill To ▾
 Total Value: Select ▾
 Order Type: Select Order Type ▾
 Supplier: Select Supplier ▾
 Requester: Select Requester ▾
 Approver/Manager: Select Approver/Manager ▾
 Status: Unsubmitted Transaction ▾
 System Note: Select System Note ▾

Order Summary Results

rows / pg : 10 ▾

Trans # ▲	Create Date	Requester	Supplier	PO #	Status	System Note	Total Value
41731	5/24/2016	Shopper user	Office Depot (Demo)	4	Unsubmitted Transaction	None	147.60 USD
41827	5/26/2016	System Admin	Officemax (Demo)	5	Unsubmitted Transaction	None	2.24 USD
41951	6/1/2016	Shopper user	Dell - Training	12	Unsubmitted Transaction	None	1,109.00 USD

Note: The default sort is arranged by Best Match.

Select the Transaction ID to view more details.

Purchase Order #:
 Create Date: to
 Fiscal Date: to
 Transaction Number: to
 GL Account Code:
 Location: Select Ship To ▾ Select Bill To ▾
 Total Value: Select ▾
 Order Type: Select Order Type ▾
 Supplier: Select Supplier ▾
 Requester: Select Requester ▾
 Approver/Manager: Select Approver/Manager ▾
 Status: Unsubmitted Transaction ▾
 System Note: Select System Note ▾

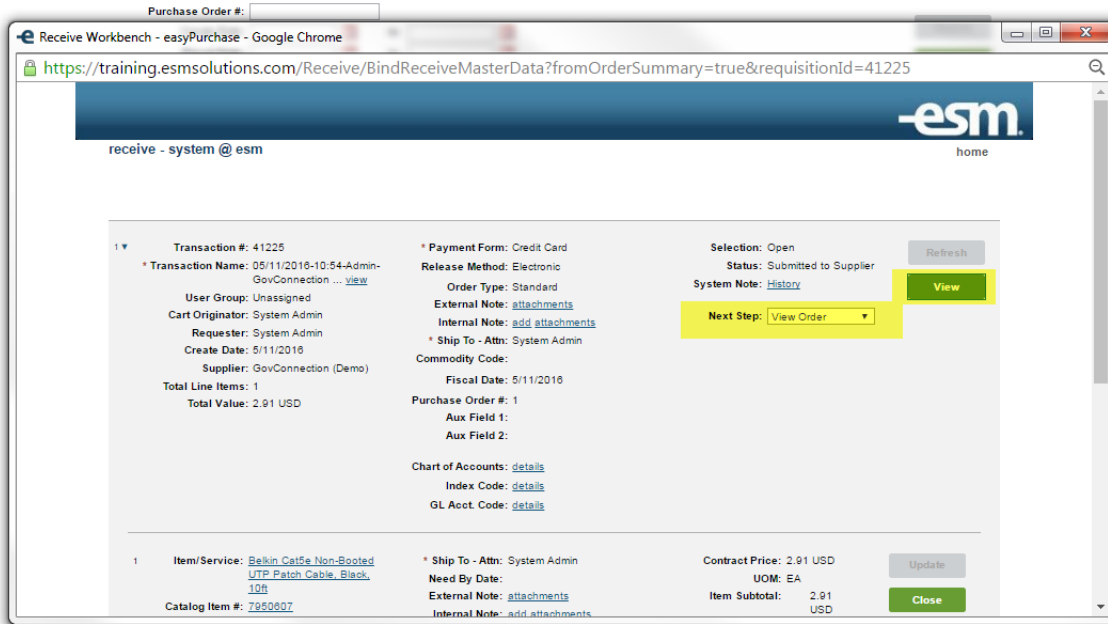
Order Summary Results

rows / pg : 10 ▾

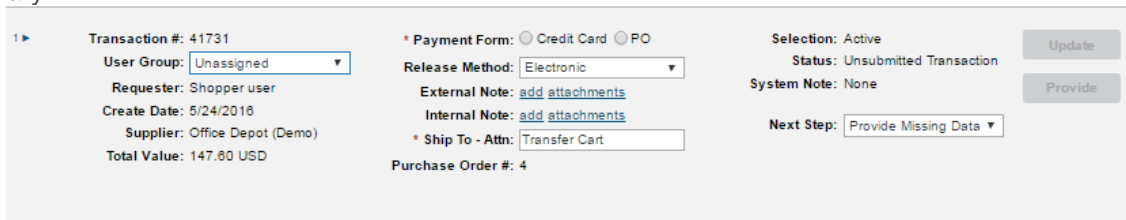
Trans # ▲	Create Date	Requester	Supplier	PO #	Status	System Note	Total Value
41731	5/24/2016	Shopper user	Office Depot (Demo)	4	Unsubmitted Transaction	None	147.60 USD
41827	5/26/2016	System Admin	Officemax (Demo)	5	Unsubmitted Transaction	None	2.24 USD
41951	6/1/2016	Shopper user	Dell - Training	12	Unsubmitted Transaction	None	1,109.00 USD
42949	6/21/2016	System Admin	Dell - Training	18	Unsubmitted Transaction	None	1,258.99 USD
43010	6/23/2016	System Admin	Dell - Training	19	Unsubmitted Transaction	None	1,258.99 USD

Users can select View Order for **submitted** transactions in the Next Step drop-down to print the order.

[shop](#) [cart \(0\)](#) [checkout](#) [approve](#)



If the user has **Order Summary Edit** permissions, **Unsubmitted** transactions can be modified from Order Summary.



Select the System Note History to view System/General Ledger activity for the order.

Order Summary Results rows / pg : 10

Trans # ▲	Create Date	Requester	Supplier	PO #	Status	System Note	Total Value
41225	5/11/2016	System Admin	GovConnection (Demo)	1	Submitted to Supplier	History	2.91 USD
41226	5/11/2016	System Admin	Office Depot (Demo)	2	Submitted to Supplier	History	1.48 USD
41227	5/11/2016	System Admin	CDWG	3	Submitted to Supplier	History	1.13 USD

Order type: | Select Order type |
 Supplier: | Select Supplier |
 Requester: | Select Requester |

Approved: **System Note - easyPurchase** X

Sy: 05/11/2016 10:55 EST
 Successfully released to supplier.

Order Summary

Trans # ▲	Total Value
41225	2.91 USD
41226	1.48 USD
41227	1.13 USD
41931	209.98 USD
41984	2,367.99 USD
42869	884.66 USD
42922	1.38 USD

Users can generate an Excel file of the search results by selecting Export. Please note this export is limited to the first 2,500 search results.

Purchase Order #:

Create Date: to

Fiscal Date: to

Transaction Number: to

GL Account Code:

Location: Select Ship To Select Bill To

Total Value: Select

Order Type: Select Order Type

Supplier: Select Supplier

Requester: Select Requester

Approver/Manager: Select Approver/Manager

Status: Unsubmitted Transaction

System Note: Select System Note

Order Summary Results rows / pg : 10

Trans # ▲	Create Date	Requester	Supplier	PO #	Status	System Note	Total Value
41731	5/24/2016	Shopper user	Office Depot (Demo)	4	Unsubmitted Transaction	None	147.60 USD
41827	5/26/2016	System Admin	Officemax (Demo)	5	Unsubmitted Transaction	None	2.24 USD
41951	6/11/2016	Shopper user	Dell - Training	12	Unsubmitted Transaction	None	1,109.00 USD

The user will receive an email containing the exported data.

Requester:

Approver/Manager:

Status:

System Note:

Order Summary - easyPurchase [X]

Your export request has been submitted.
 You will receive an email with the export data once complete.

[OK]

Create Date	Requester	System Note
5/11/2016	System Admin	
5/11/2016	System Admin	
5/11/2016	System Admin	
6/1/2016	Shopper user	Dell - Training
6/2/2016	Shopper user	Dell - Training

Extracts

Using the Menu drop-down, select Extracts to generate select reports.

shop - system @ esm

shop | cart (0) | menu | help | home

admin
 applications
 dashboard
extracts
 order summary
 reporting
 profile

Search Keyword(s), Item Numbers, etc.

IT Suppliers

Welcome to the ESM Marketplace!

DELL | GovConnection | CDW

Please Note: Extract access is a privilege assigned by System Administrators.

Select the Type of extract from the drop-down menu, enter a name for the file and provide a date range as needed.

* Select an extract:

* Extract Name:

Start Date:

Go

Extract Name	Start Date	End Date	Date Submitted	Date Delivered
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Click Refresh to update the status and access your extract once available.

[Refresh]

Select Go to execute the extract criteria.

shop cart (0) checkout approve

* Select an extract: Entity Activity Extract
 * Extract Name: Procedure Doc
 * Start Date: 07/02/2015 * End Date: 06/30/2016 **Go**

Extract Name	Start Date	End Date	Date Submitted	Date Delivered
--------------	------------	----------	----------------	----------------

Click Refresh to update the status and access your extract once available. **Refresh**

The pop-up window confirms the submission. The user will receive an email when the extract is available.

* Select an extract: Select Extract
 * Extract Name: Enter Name for Extract
 * Start Date: 07/02/2015 * End Date: 06/30/2016 **Go**

Extract Name	Start Date	End Date	Date Submitted	Date Delivered
Procedure Doc -2573.csv	07/02/2015	06/30/2016	06/30/2016 09:01	

Click Refresh to update the status and access your extract once available. **Refresh**

Extracts - easyPurchase

Your extract request has been submitted. You will receive an email once your extract is ready to view.
 Typically extract processing will take 5-7 minutes.

OK

The user can select Refresh to access the completed extract.

Extract Name	Start Date	End Date	Date Submitted	Date Delivered
Procedure Doc -2573.csv	07/02/2015	06/30/2016	06/30/2016 09:01	

Click Refresh to update the status and access your extract once available. **Refresh**

Select the Extract Name to download the extract.

Extract Name	Start Date	End Date	Date Submitted	Date Delivered
Procedure Doc -2573.csv	07/02/2015	06/30/2016	06/30/2016 09:01	06/30/2016 09:01

Click Refresh to update the status and access your extract once available.

Dashboard

Using the Menu drop-down, select Dashboard.

shop - system @ esm

cart (0) menu help home

shop cart (0) checkout approve

Search Keyword(s), Item Numbers, etc.

IT Suppliers

Welcome to the ESM Marketplace!

Dell GovConnection CDW

Please Note: Dashboard access is a privilege assigned by System Administrators.

The Dashboard opens in a pop-up window containing three reports: Top 5 Suppliers by Purchase USD, Transactions by Supplier with Average spend per transaction, and System Utilization with Total Number of Users.

