ESM Purchase™ System Administrator Reference Guide

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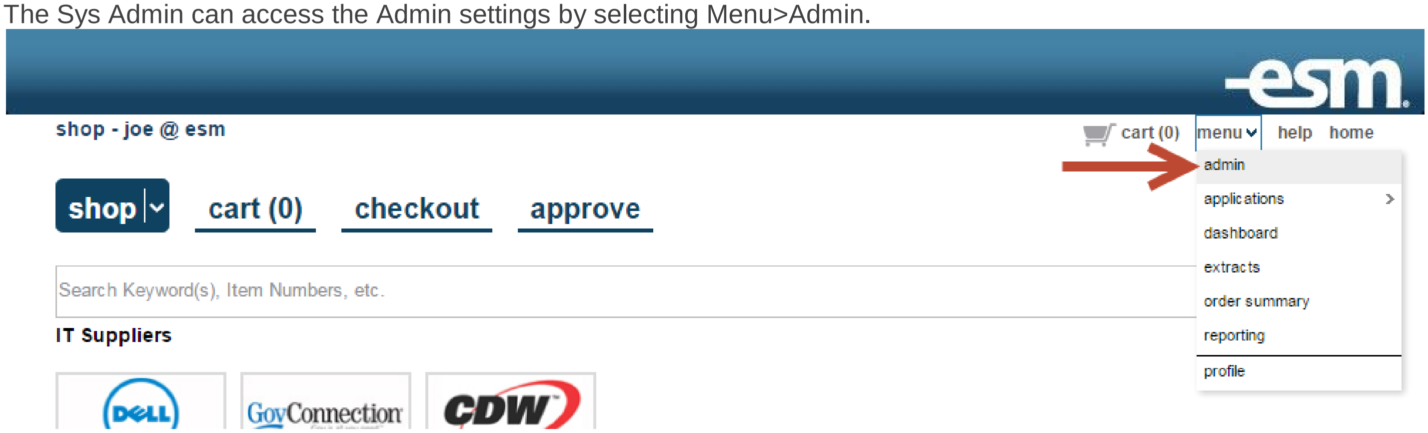
ESM Purchase™ System Administrator Process

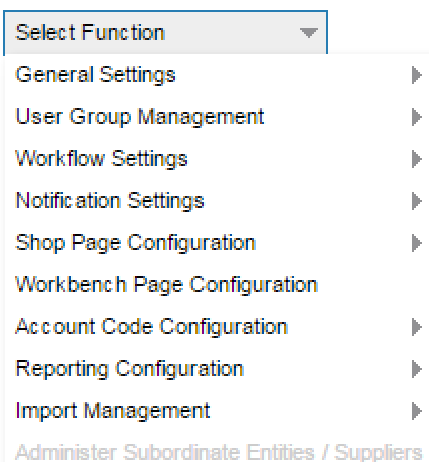
This document provides a condensed overview of the ESM Purchase™ System Administrator Process. It will demonstrate with short text descriptions supported by screen shots for each step explained. Based on system configuration, Sys Admins may not see all functionality shown within Reference Guide.

Accessing Admin Settings

The Sys Admin can access the Admin settings by selecting Menu>Admin.

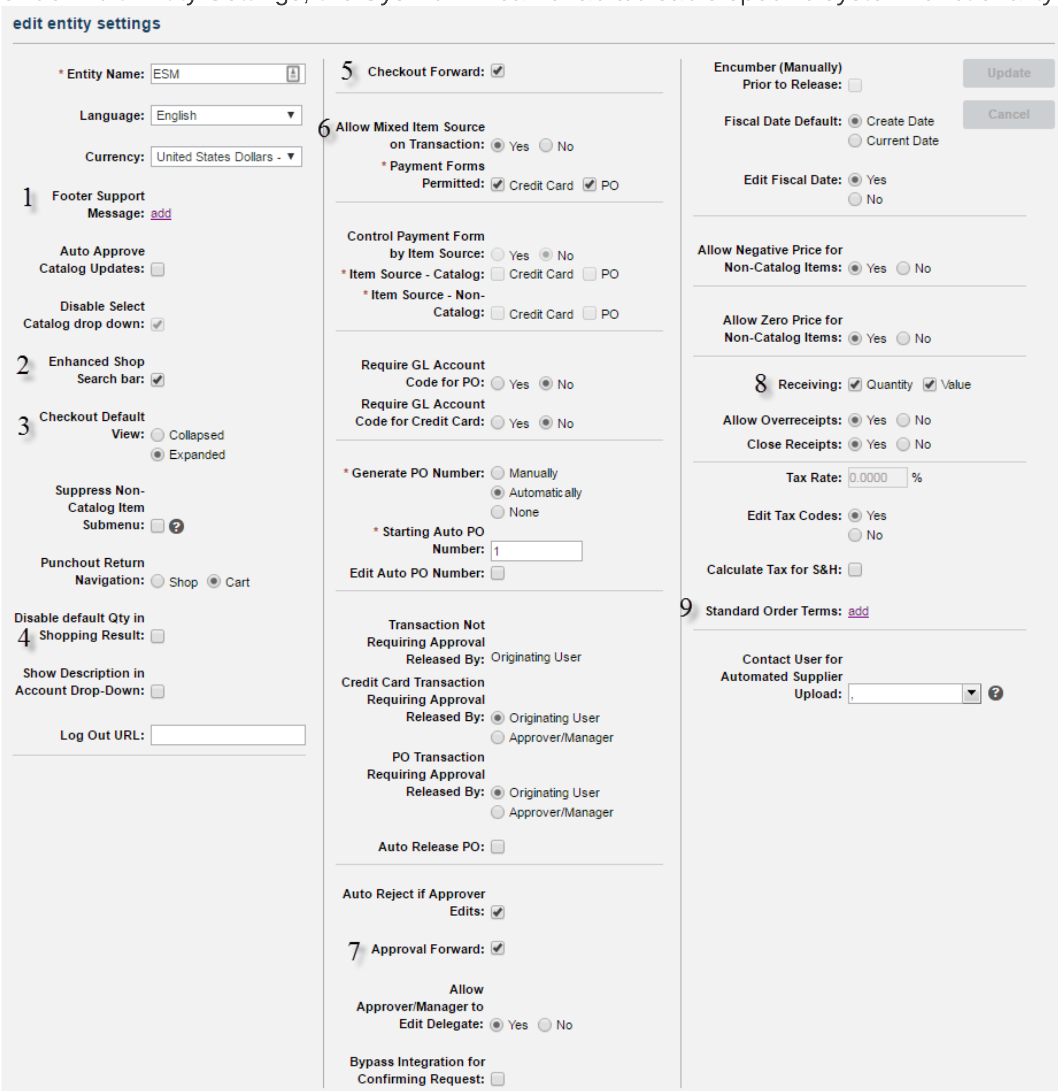


The Select Function displays all Sys Admin settings.

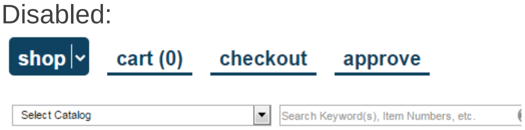


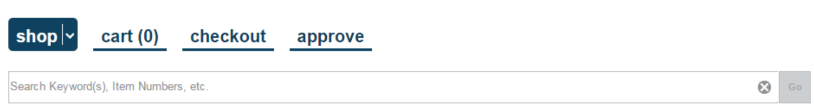
General Settings

Under Edit Entity Settings, the Sys Admin can enable/disable specific system functionality.



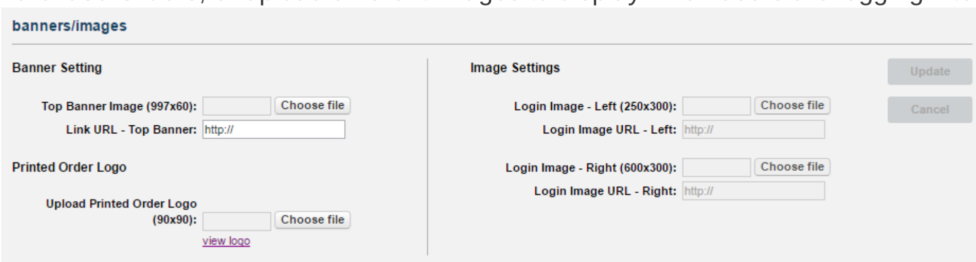
1. **Footer Support Message**: Customizable text at footer of ESM Purchase to replace ESM Support contact
2. **Enhanced Shop Search bar:** Aesthetic change for searching catalogs
   Disabled: Enabled:



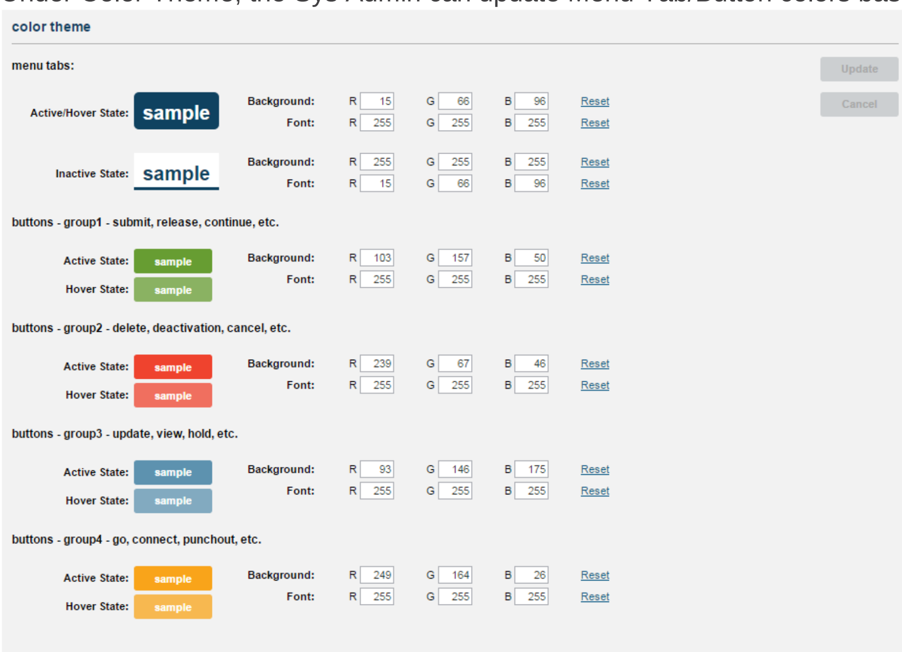


3. **Checkout Default View**: Collapsed vs Expanded view for line items after converting order to transaction on Checkout tab
4. **Disable Default Qty in Shopping Results**: unchecked causes Qty of 1 entered when clicking into Qty field during selecting items in Shop
5. **Checkout Forward**: ability to transfer transactions from Checkout user to Checkout user
6. **Allow Mixed Item Source on Transaction**: allows for catalog/non-catalog items on same transaction if the same supplier
7. **Approval Forward**: ability to transfer transactions from Approver to Approver to approve on another's behalf
8. **Receiving (Quantity/Value):** Receive items based on physical amount (Quantity) and/or dollar amount (Value)
9. **Standard Order Terms**: text/images that appear at the bottom of all Purchase Orders

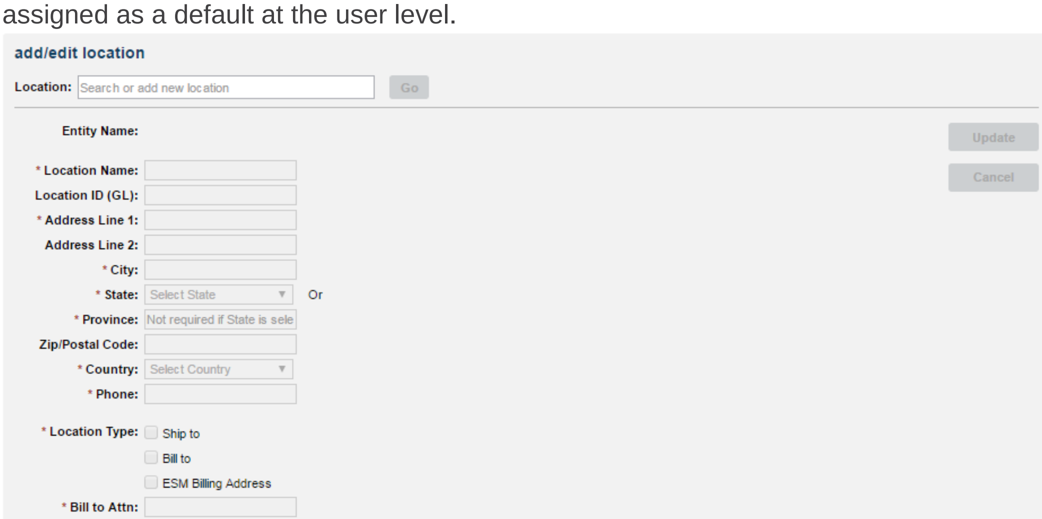
Under Banners/Images, the Sys Admin can replace the existing ESM Top Banner, upload a logo to appear on all Printed Purchase Orders, or upload different images to display when users are logging into the application.



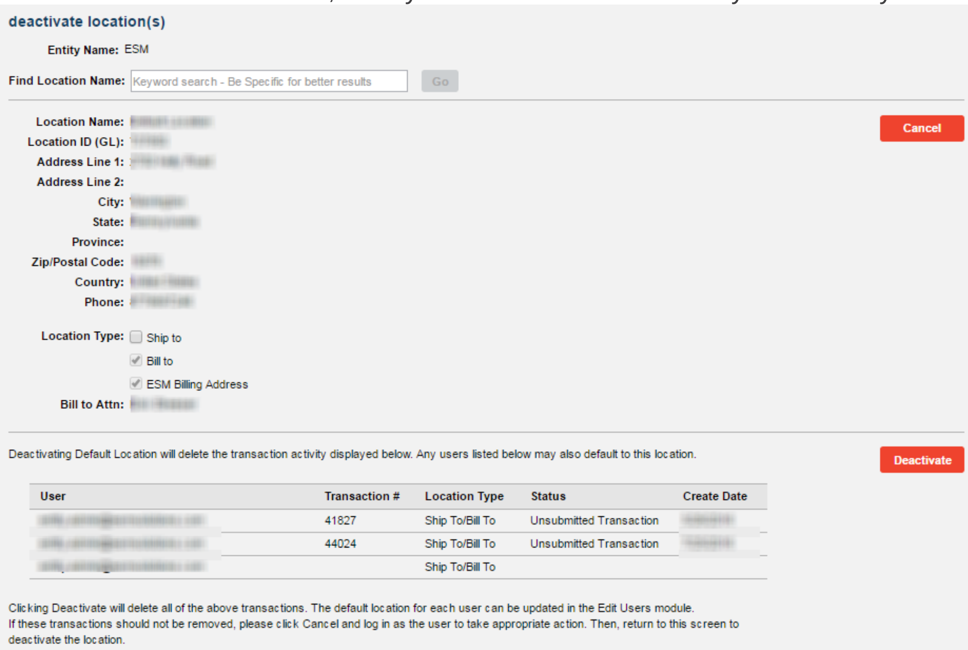
Under Color Theme, the Sys Admin can update Menu Tab/Button colors based on preference.



Under Add/Edit Location, the Sys Admin can add/edit Ship to, Bill to and ESM Billing Address locations. Locations are assigned as a default at the user level.



Under Deactivate Locations, the Sys Admin can deactivate any locations by unchecking the Location Type.



deactivate location(s)

Entity Name: ESM

Find Location Name: Keyword search - Be Specific for better results Go

Location Name:
Location ID (GL):
Address Line 1:
Address Line 2:
City:
State:
Province:
Zip/Postal Code:
Country:
Phone:

Location Type: Ship to
Bill to
ESM Billing Address

Bill to Attn:

Cancel

Deactivating Default Location will delete the transaction activity displayed below. Any users listed below may also default to this location.

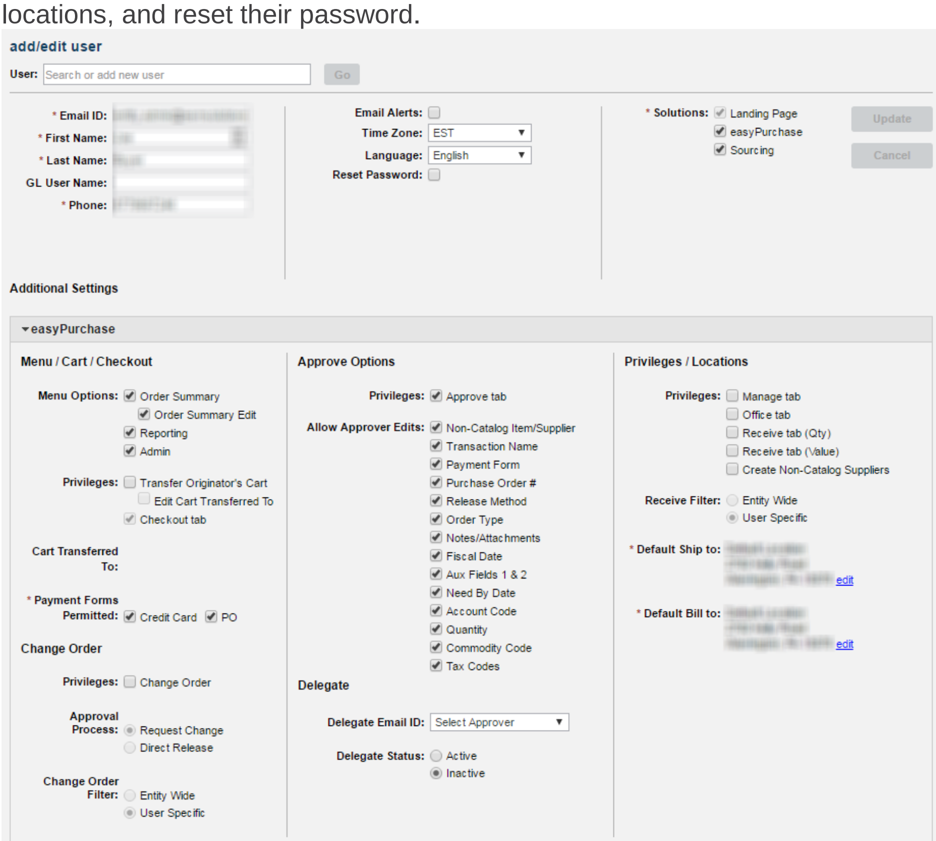
Deactivate

User	Transaction #	Location Type	Status	Create Date
	41827	Ship To/Bill To	Unsubmitted Transaction	
	44024	Ship To/Bill To	Unsubmitted Transaction	
		Ship To/Bill To		

Clicking Deactivate will delete all of the above transactions. The default location for each user can be updated in the Edit Users module.
If these transactions should not be removed, please click Cancel and log in as the user to take appropriate action. Then, return to this screen to deactivate the location.

<u>Note</u>: The transaction activity displayed is **deleted** and note that any users displayed may currently default to the deactivated location.

Under Add/Edit User, the Sys Admin can add a user or edit user's contact information, system privileges, default locations, and reset their password.



add/edit user

User: Search or add new user Go

* Email ID:
* First Name:
* Last Name:
GL User Name:
* Phone:

Email Alerts:
Time Zone: EST
Language: English
Reset Password:

* Solutions: Landing Page
easyPurchase
Sourcing

Update
Cancel

Additional Settings

easyPurchase

Menu / Cart / Checkout

Menu Options: Order Summary
Order Summary Edit
Reporting
Admin

Privileges: Transfer Originator's Cart
Edit Cart Transferred To
Checkout tab

Cart Transferred To:

* Payment Forms Permitted: Credit Card PO

Change Order

Privileges: Change Order

Approval Process: Request Change
Direct Release

Change Order Filter: Entity Wide
User Specific

Approve Options

Privileges: Approve tab

Allow Approver Edits: Non-Catalog Item/Supplier
Transaction Name
Payment Form
Purchase Order #
Release Method
Order Type
Notes/Attachments
Fiscal Date
Aux Fields 1 & 2
Need By Date
Account Code
Quantity
Commodity Code
Tax Codes

Delegate

Delegate Email ID: Select Approver

Delegate Status: Active
Inactive

Privileges / Locations

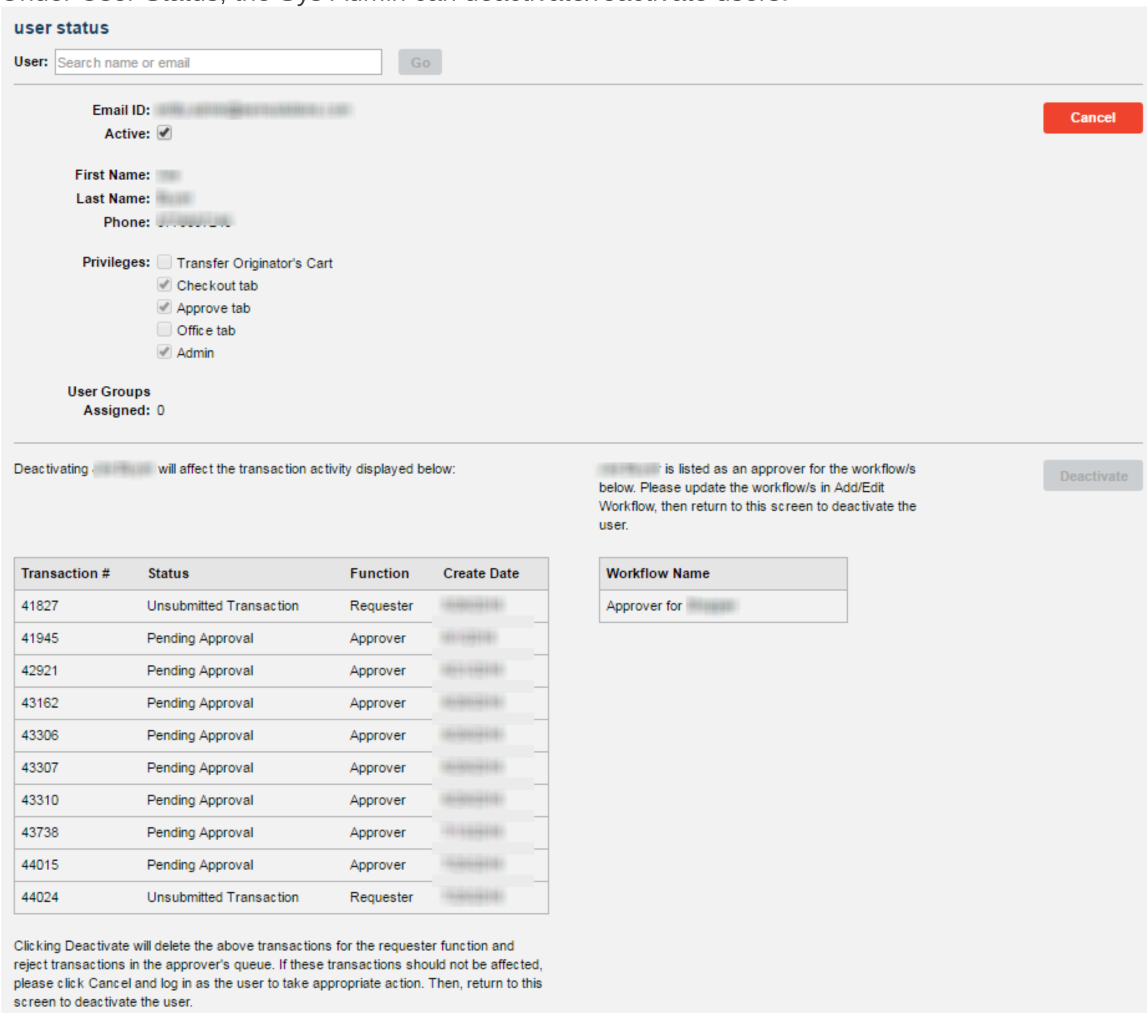
Privileges: Manage tab
Office tab
Receive tab (Qty)
Receive tab (Value)
Create Non-Catalog Suppliers

Receive Filter: Entity Wide
User Specific

* Default Ship to: edit

* Default Bill to: edit

Under User Status, the Sys Admin can deactivate/reactivate users.



user status

User: Search name or email Go

Cancel

Email ID: [redacted]
Active: ☑

First Name: [redacted]
Last Name: [redacted]
Phone: [redacted]

Privileges: ☐ Transfer Originator's Cart
☑ Checkout tab
☑ Approve tab
☐ Office tab
☑ Admin

User Groups Assigned: 0

Deactivating [redacted] will affect the transaction activity displayed below:

[redacted] is listed as an approver for the workflow/s below. Please update the workflow/s in Add/Edit Workflow, then return to this screen to deactivate the user.

Deactivate

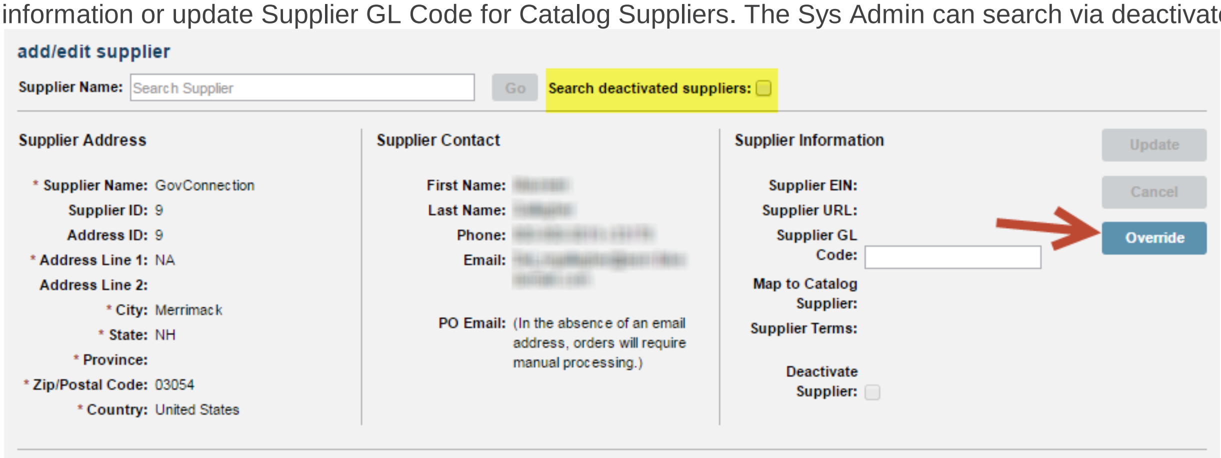
Transaction #	Status	Function	Create Date
41827	Unsubmitted Transaction	Requester	[redacted]
41945	Pending Approval	Approver	[redacted]
42921	Pending Approval	Approver	[redacted]
43162	Pending Approval	Approver	[redacted]
43306	Pending Approval	Approver	[redacted]
43307	Pending Approval	Approver	[redacted]
43310	Pending Approval	Approver	[redacted]
43738	Pending Approval	Approver	[redacted]
44015	Pending Approval	Approver	[redacted]
44024	Unsubmitted Transaction	Requester	[redacted]

Workflow Name
Approver for [redacted]

Clicking Deactivate will delete the above transactions for the requester function and reject transactions in the approver's queue. If these transactions should not be affected, please click Cancel and log in as the user to take appropriate action. Then, return to this screen to deactivate the user.

Note: The transaction activity is deleted and transactions are rejected in approver queue if user is deactivated.

Under Add/Edit Supplier, the Sys Admin can add/edit a Manual (Non-Catalog) Supplier and verify their PO email. The Sys Admin can review Catalog Suppliers managed by ESM. The Sys Admin does have the ability to override the contact information or update Supplier GL Code for Catalog Suppliers. The Sys Admin can search via deactivated suppliers.



add/edit supplier

Supplier Name: Search Supplier Go **Search deactivated suppliers:** ☐

Supplier Address

* Supplier Name: GovConnection
Supplier ID: 9
Address ID: 9
* Address Line 1: NA
Address Line 2:
* City: Merrimack
* State: NH
* Province:
* Zip/Postal Code: 03054
* Country: United States

Supplier Contact

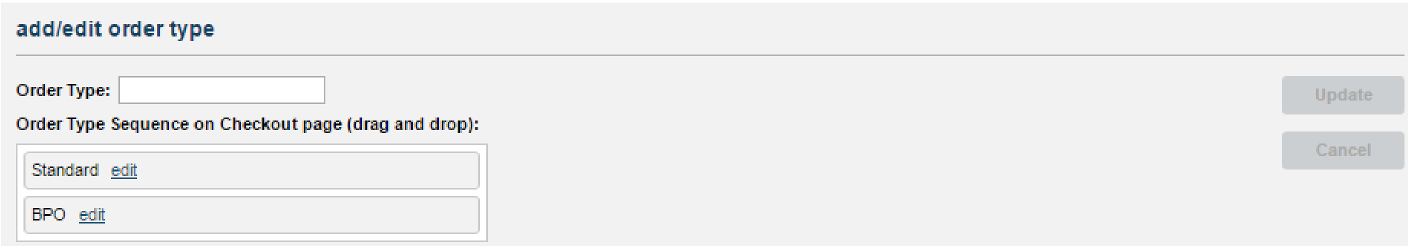
First Name: [redacted]
Last Name: [redacted]
Phone: [redacted]
Email: [redacted]
PO Email: (In the absence of an email address, orders will require manual processing.)

Supplier Information

Supplier EIN:
Supplier URL:
Supplier GL Code:
Map to Catalog Supplier:
Supplier Terms:
Deactivate Supplier: ☐

Update
Cancel
Override

Under Add/Edit Order Type, the Sys Admin can add/edit Order Types for requesters to select during the Checkout process.



add/edit order type

Order Type:

Order Type Sequence on Checkout page (drag and drop):

Standard edit

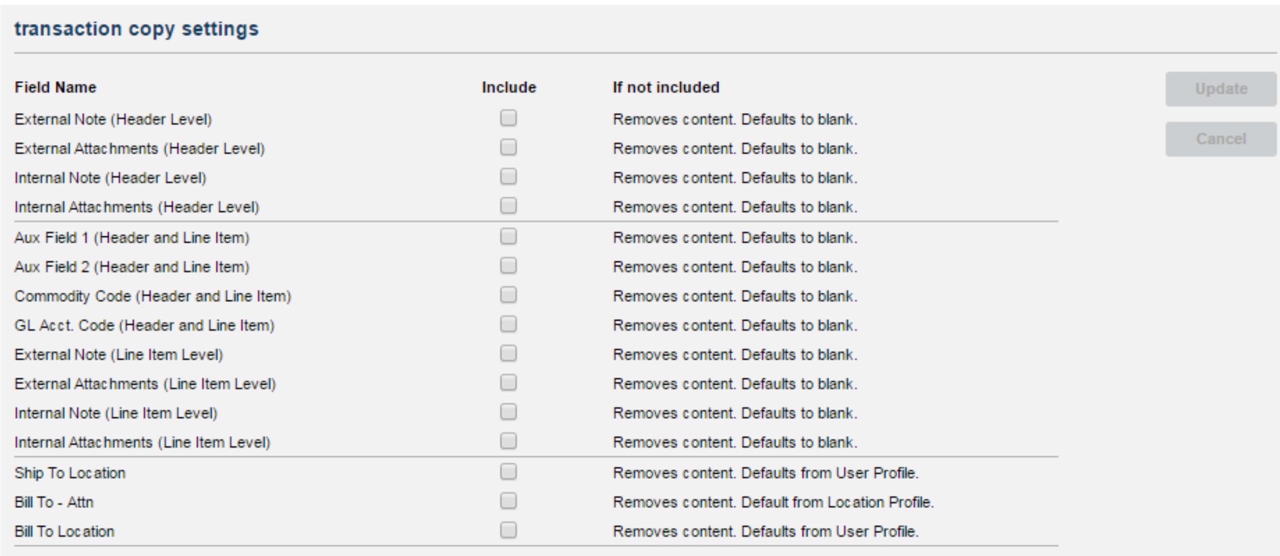
BPO edit

Update

Cancel

Note: Order Type can be configured to bypass the General Ledger.

Under Transaction Copy Settings, the Sys Admin can select the desired information that will be included during the Copy Transaction function in the Checkout tab.



transaction copy settings

Field Name	Include	If not included
External Note (Header Level)		Removes content. Defaults to blank.
External Attachments (Header Level)		Removes content. Defaults to blank.
Internal Note (Header Level)		Removes content. Defaults to blank.
Internal Attachments (Header Level)		Removes content. Defaults to blank.
Aux Field 1 (Header and Line Item)		Removes content. Defaults to blank.
Aux Field 2 (Header and Line Item)		Removes content. Defaults to blank.
Commodity Code (Header and Line Item)		Removes content. Defaults to blank.
GL Acct. Code (Header and Line Item)		Removes content. Defaults to blank.
External Note (Line Item Level)		Removes content. Defaults to blank.
External Attachments (Line Item Level)		Removes content. Defaults to blank.
Internal Note (Line Item Level)		Removes content. Defaults to blank.
Internal Attachments (Line Item Level)		Removes content. Defaults to blank.
Ship To Location		Removes content. Defaults from User Profile.
Bill To - Attn		Removes content. Default from Location Profile.
Bill To Location		Removes content. Defaults from User Profile.

Update

Cancel

Note: Punchout Catalog transactions cannot be copied.

Under Unit of Measure Library, the Sys Admin add/edit Unit of Measures for requesters to choose from when creating a Non-Catalog item.

unit of measure library

UOM:

UOM sequence in Product Detail popup (drag and drop):

Each edit

Update

Cancel

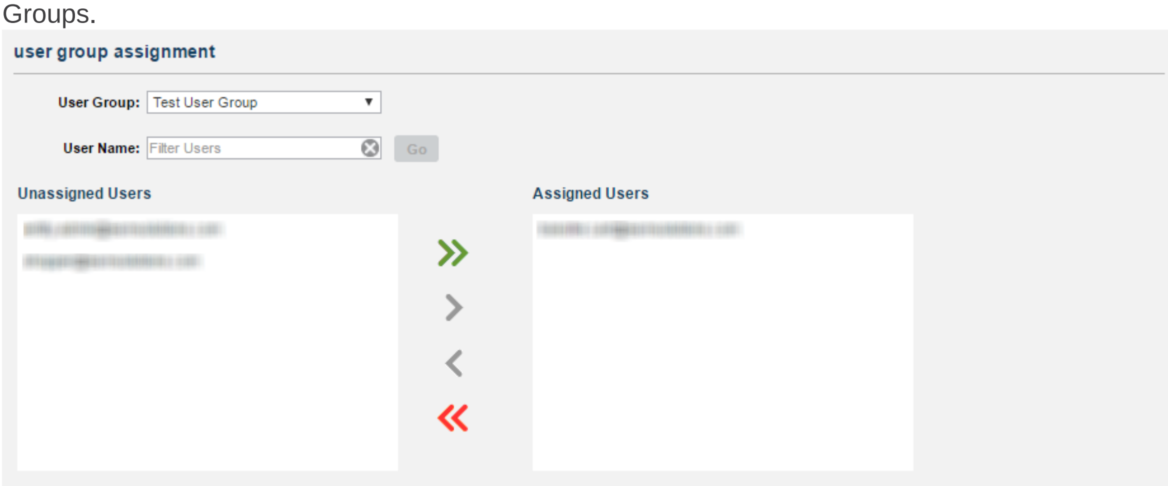
Note: If Unit of Measure Library is not configured, the Unit of Measure will be a text-entry field.

User Group Management

Under Add/Edit User Group, the Sys Admin can add/edit/delete User Groups with the purpose of associating users together of a similar function.

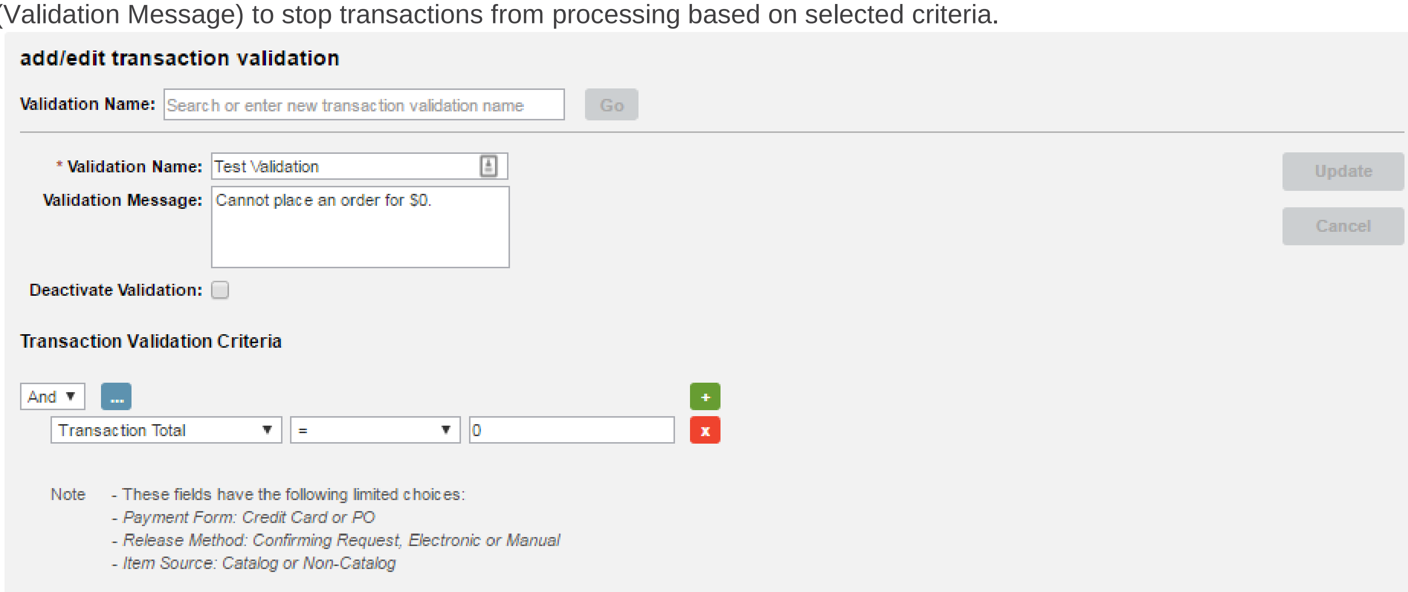
Note: Users can be in more than one User Group.

Under User Group Assignment, the Sys Admin can select the desired users to be added or removed from existing User Groups.

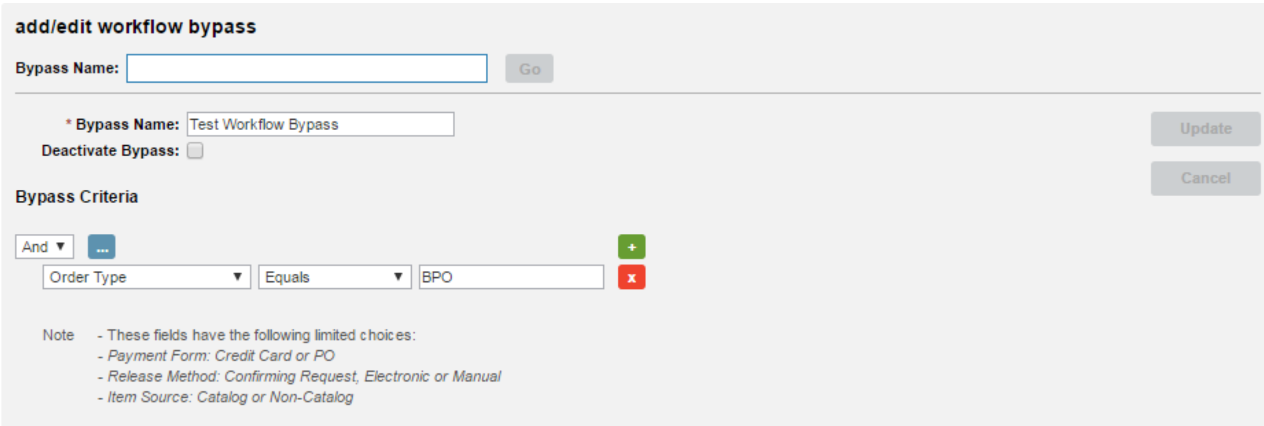


Workflow Settings

Under Add/Edit Transaction Validation, the Sys Admin can add/edit/deactivate rules that generates a System Alert (Validation Message) to stop transactions from processing based on selected criteria.



Under Add/Edit Workflow Bypass, the Sys Admin can permit transactions to deviate from applicable workflows based on selected criteria.

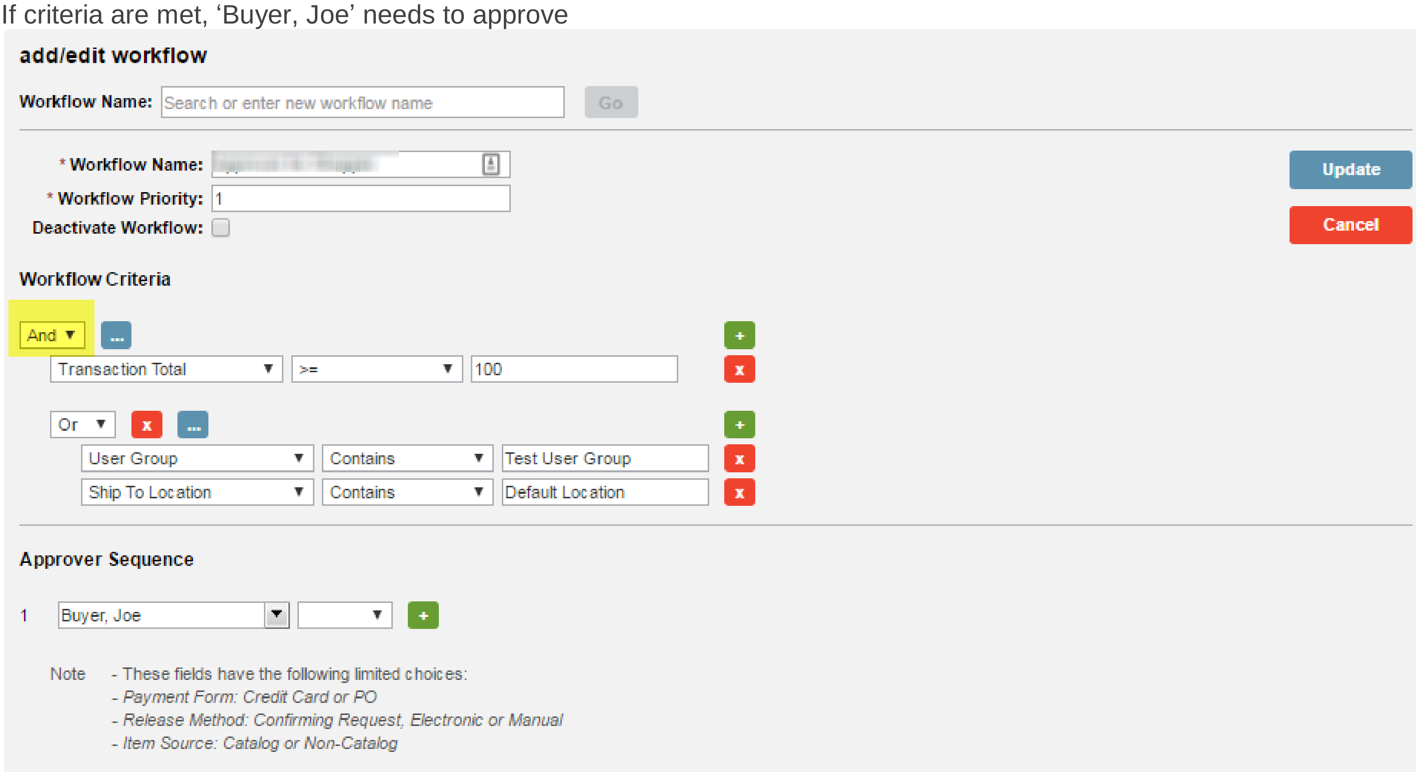


Note: Orders eligible for Workflow Bypass will not touch any General Ledger integrations.

Under Add/Edit Workflow, the Sys Admin can add/edit/deactivate workflows and their priority. Workflows determine the Approvers based on selected criteria. The criteria can be nested as shown below. The nested workflow below is stating: Both of the following criteria need to be met based on the **AND** statement highlighted below

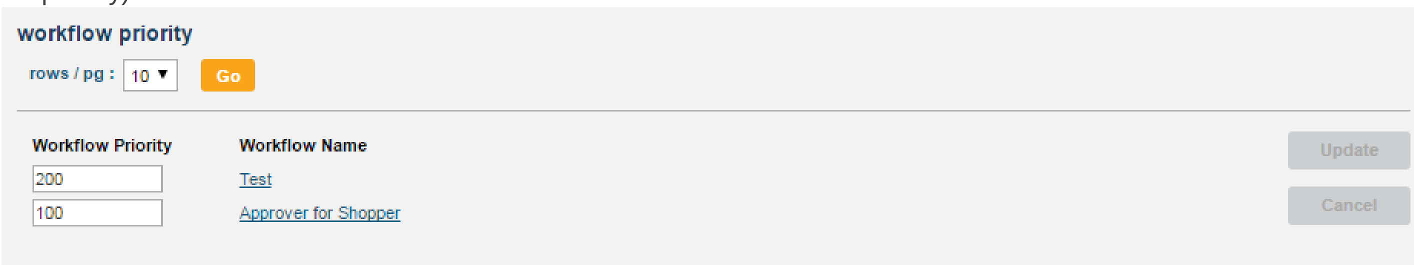
- Transaction total is greater than 100
- User Group Contains Test User Group **OR** Ship To Location Contains Default Location

If criteria are met, 'Buyer, Joe' needs to approve

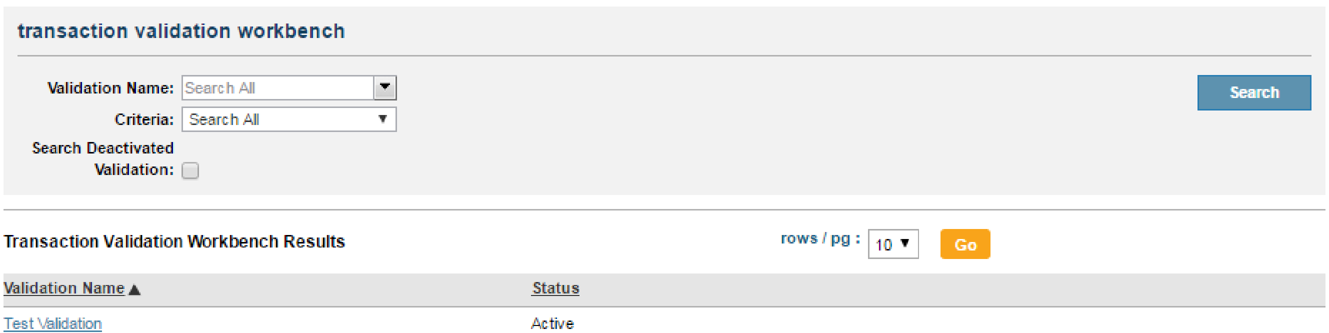


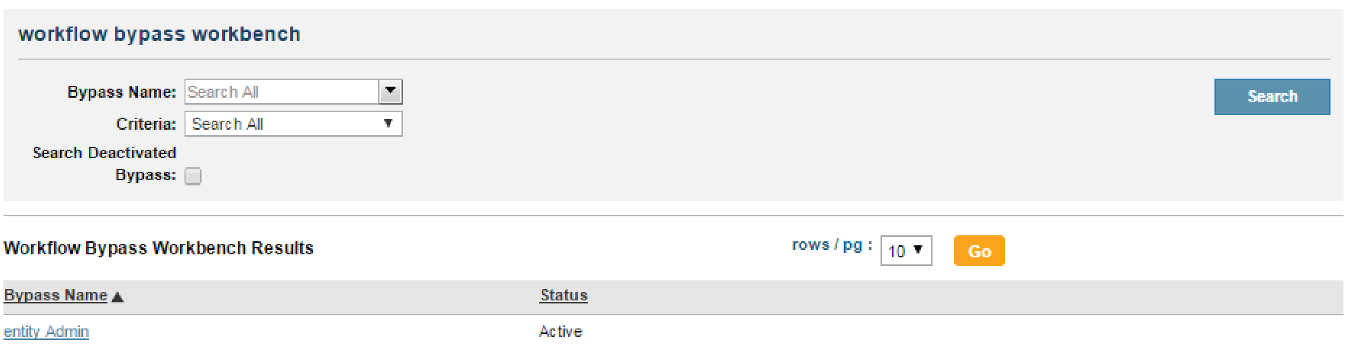
Note: It is recommended that the Sys Admin uses Contains when possible, instead of Equals. When making workflow updates, ESM encourages testing in Training Environment.

Under Workflow Priority, the Sys Admin can review/edit Workflow Priorities used to determine the order if multiple workflows are applicable for one transaction. The workflows will be in numeric order (the lower the number, the higher the priority).

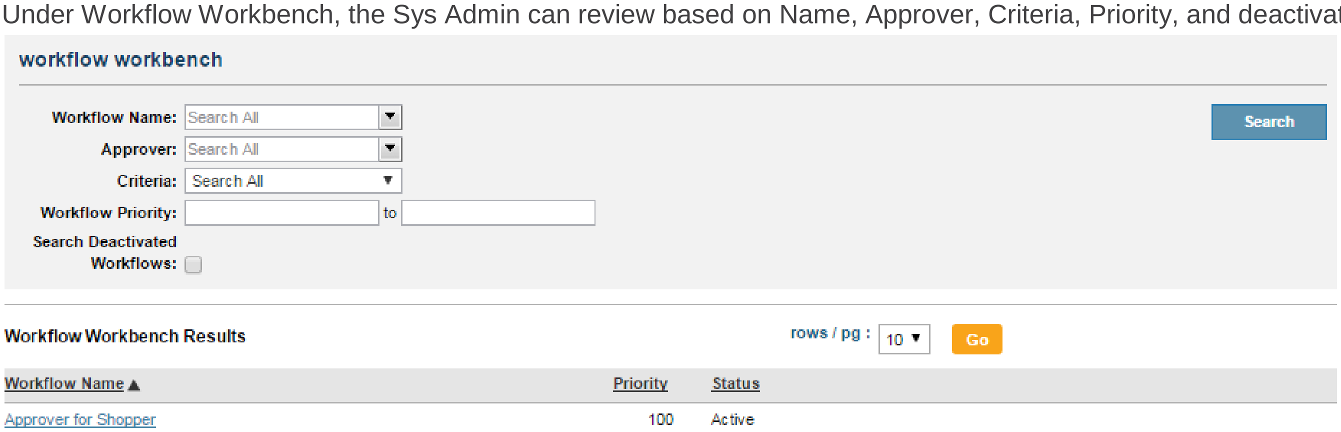


Under Transaction Validation/Workflow Bypass Workbench, the Sys Admin can review based on Name, Criteria, and deactivation.

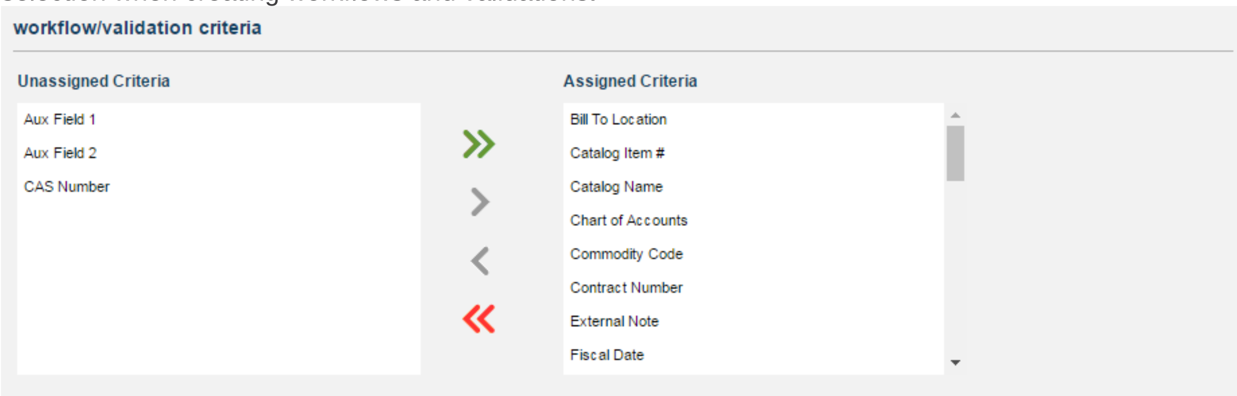




Under Workflow Workbench, the Sys Admin can review based on Name, Approver, Criteria, Priority, and deactivation.

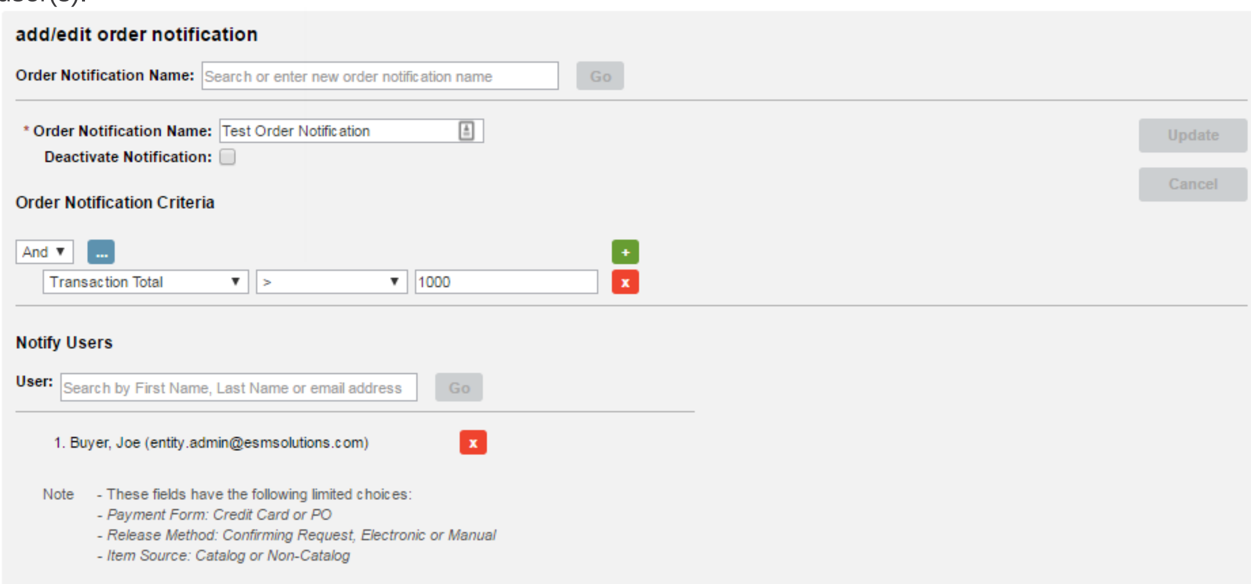


Under Workflow/Validation Criteria, the Sys Admin can add/remove the desired criteria that displays on the drop-down selection when creating workflows and validations.

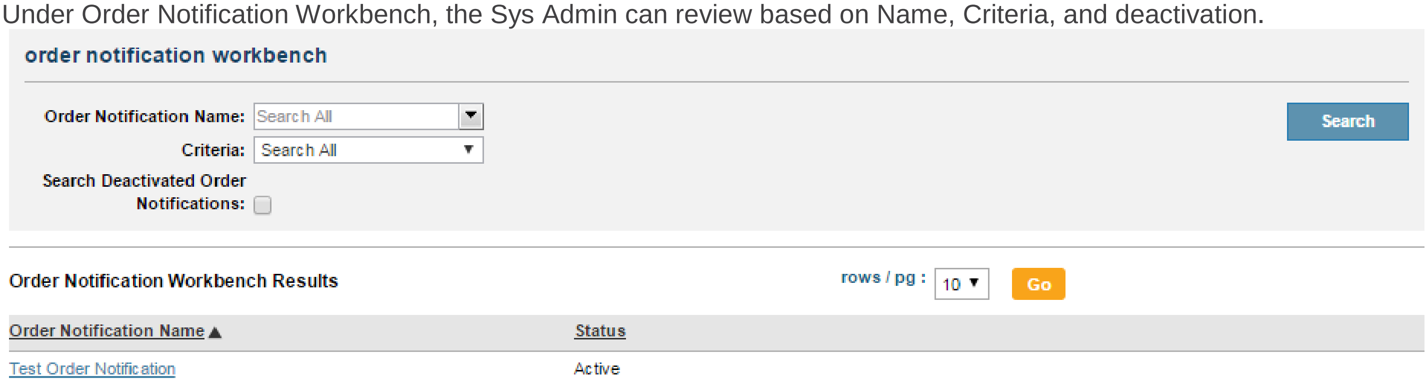


Notification Settings

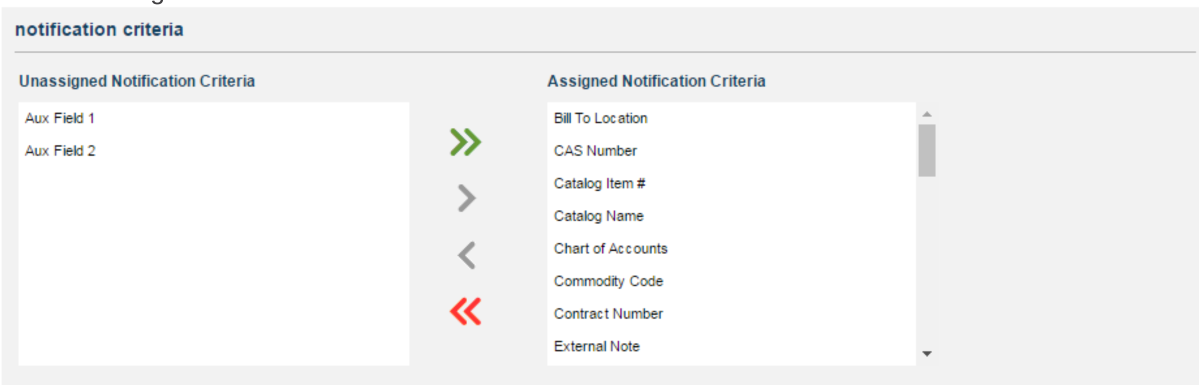
Under Add/Edit Order Notification, the Sys Admin can add/edit/deactivate notifications for submitted orders to inform new user(s).



Under Order Notification Workbench, the Sys Admin can review based on Name, Criteria, and deactivation.

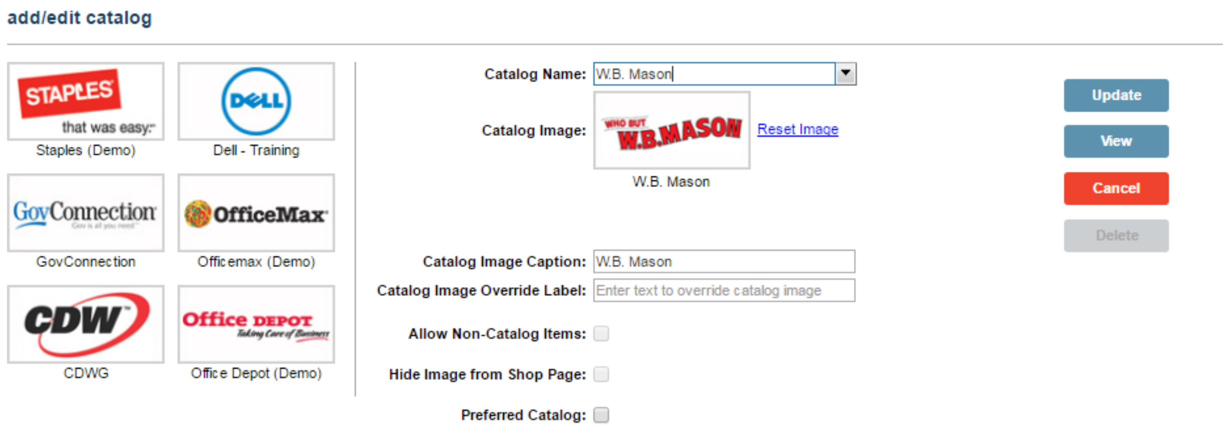


Under Notification Criteria, the Sys Admin can add/remove the desired criteria that displays on the drop-down selection when creating notifications.



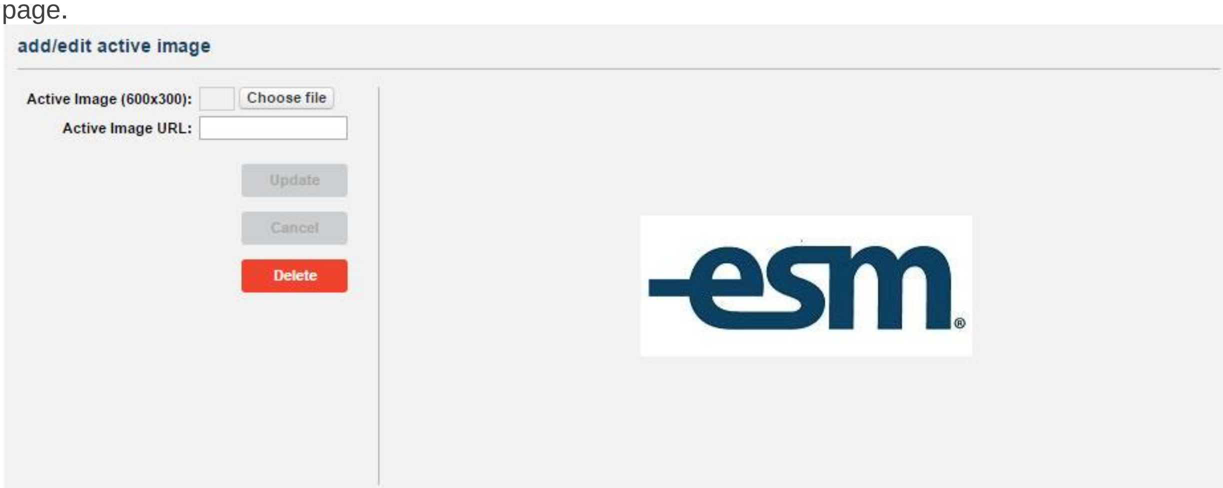
Shop Page Configuration

Under Vertical>Add/Edit Catalog, the Sys Admins can assign/delete catalogs to their environment using the Catalog Name drop-down menu. View displays the items within the Catalog.

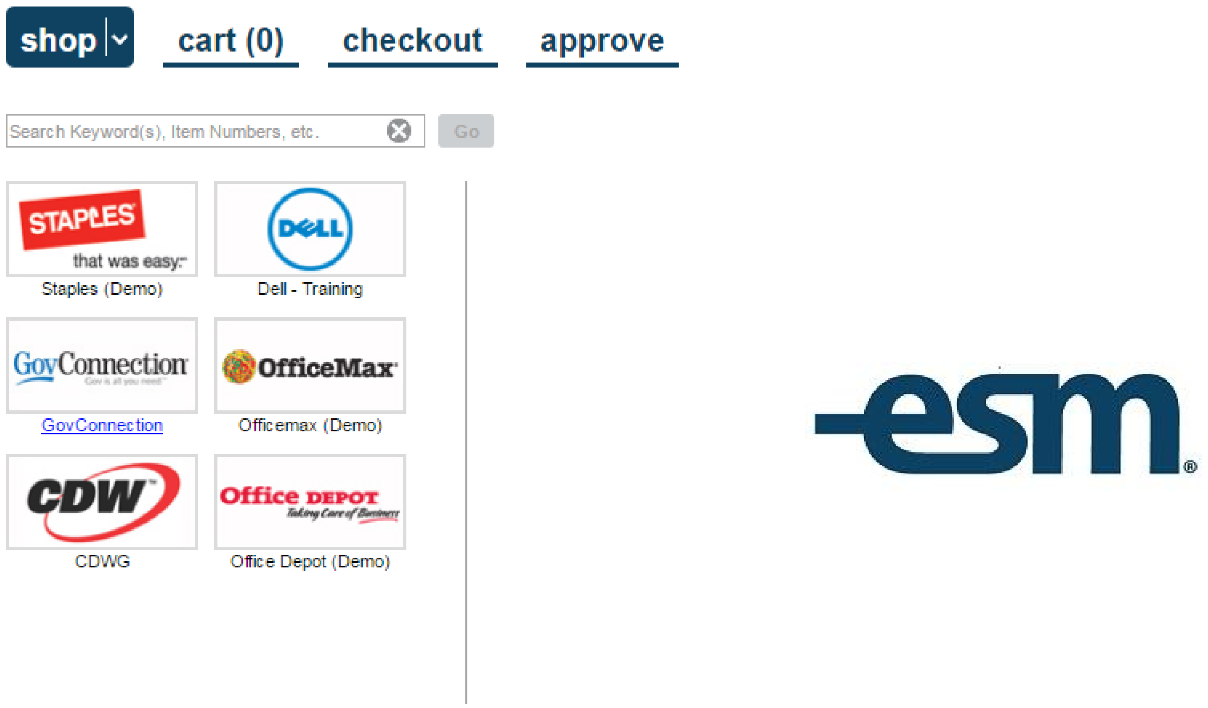


Note: Preferred Catalog brings the catalog items to the top of the search results on Shop.

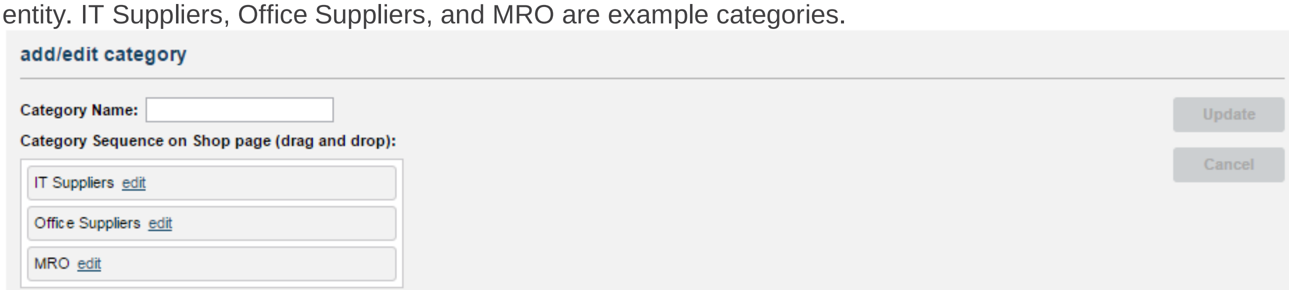
Under Vertical>Add/Edit Active Image, the Sys Admin can upload a JPEG file or Image URL to display on the Shop page.



Below, is an example of the User Interface with a Vertical Shop Page Configuration.

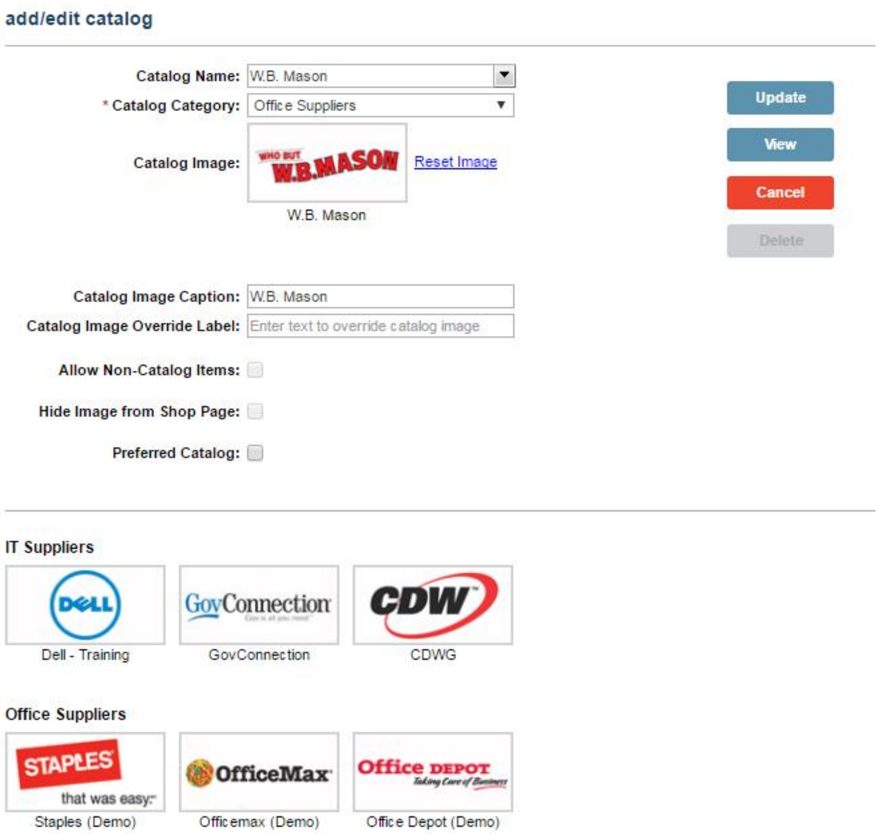


Under Horizontal, the Sys Admin can Add/Edit Catalogs with or without Categories. Under Horizontal>Catalog with Categories>Add/Edit Categories, the Sys Admin can add/edit/deactivate categories to organize catalogs assigned to the entity. IT Suppliers, Office Suppliers, and MRO are example categories.



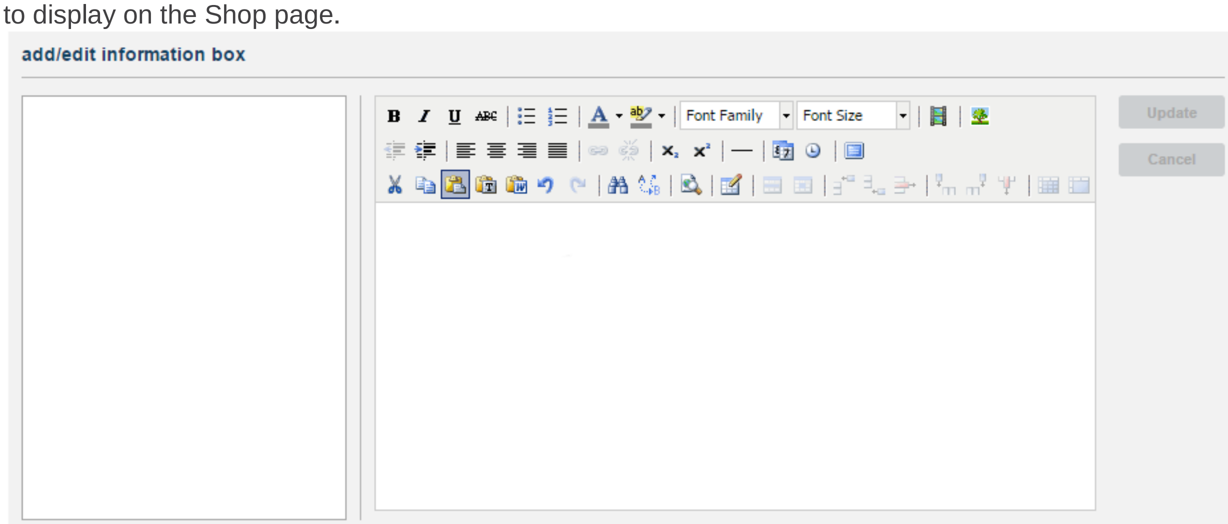
Note: Vertical does not allow for Categories.

Under Horizontal>Catalog with Categories>Add/Edit Catalog, the Sys Admins can assign/delete catalogs to their environment using the Catalog Name drop-down menu. Unlike Vertical, the Sys Admin needs to select a Catalog Category. View displays the items within the Catalog.

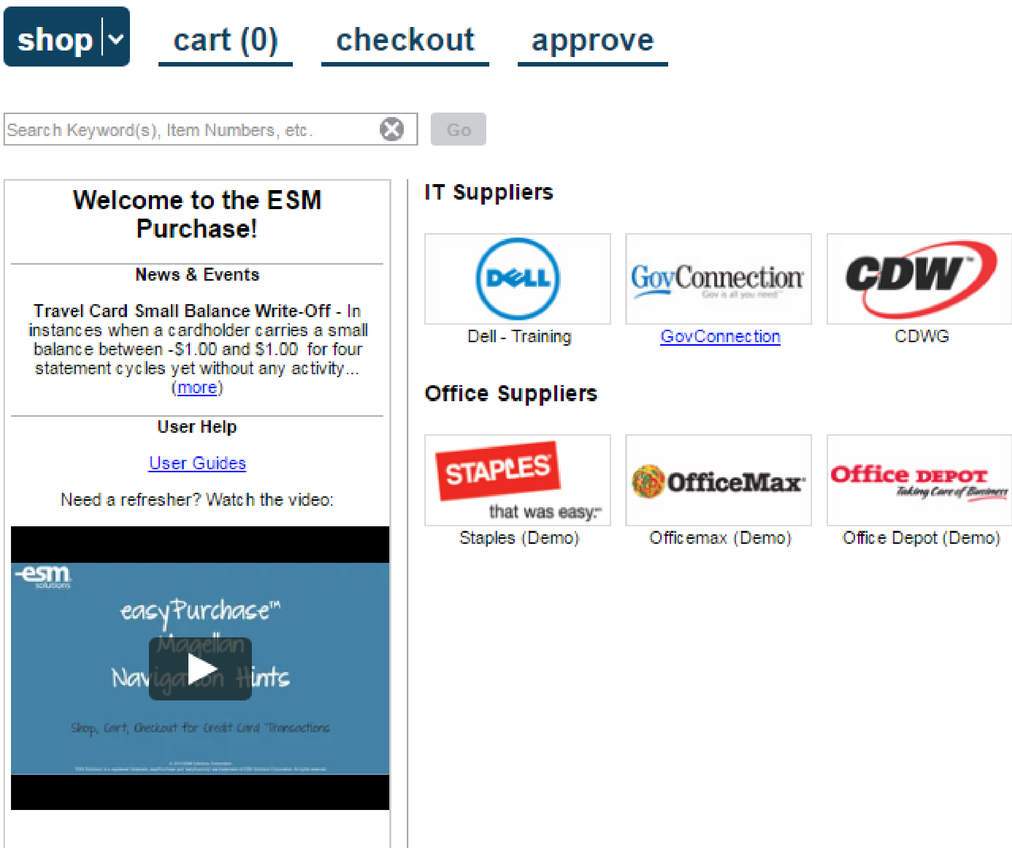


Note: Preferred Catalog brings the catalog items to the top of the search results on Shop.

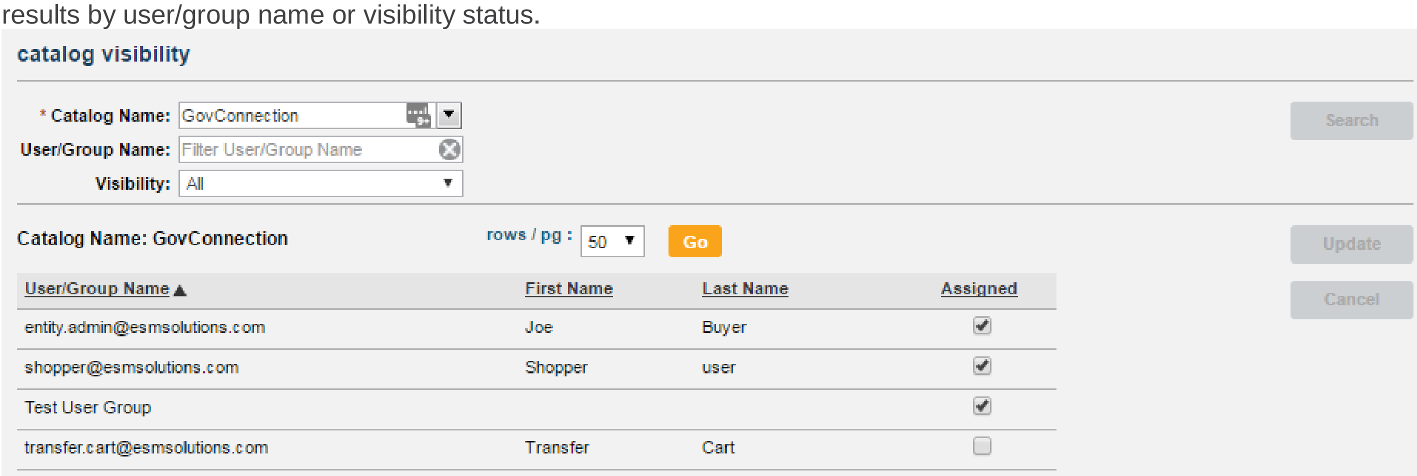
Under Horizontal>Catalog with Categories>Add/Edit Information Box, the Sys Admin can enter text, videos, pictures, etc. to display on the Shop page.



Below, is an example of the User Interface with a Horizontal Shop Page Configuration. The Catalogs are separated into Categories (IT Suppliers and Office Suppliers).



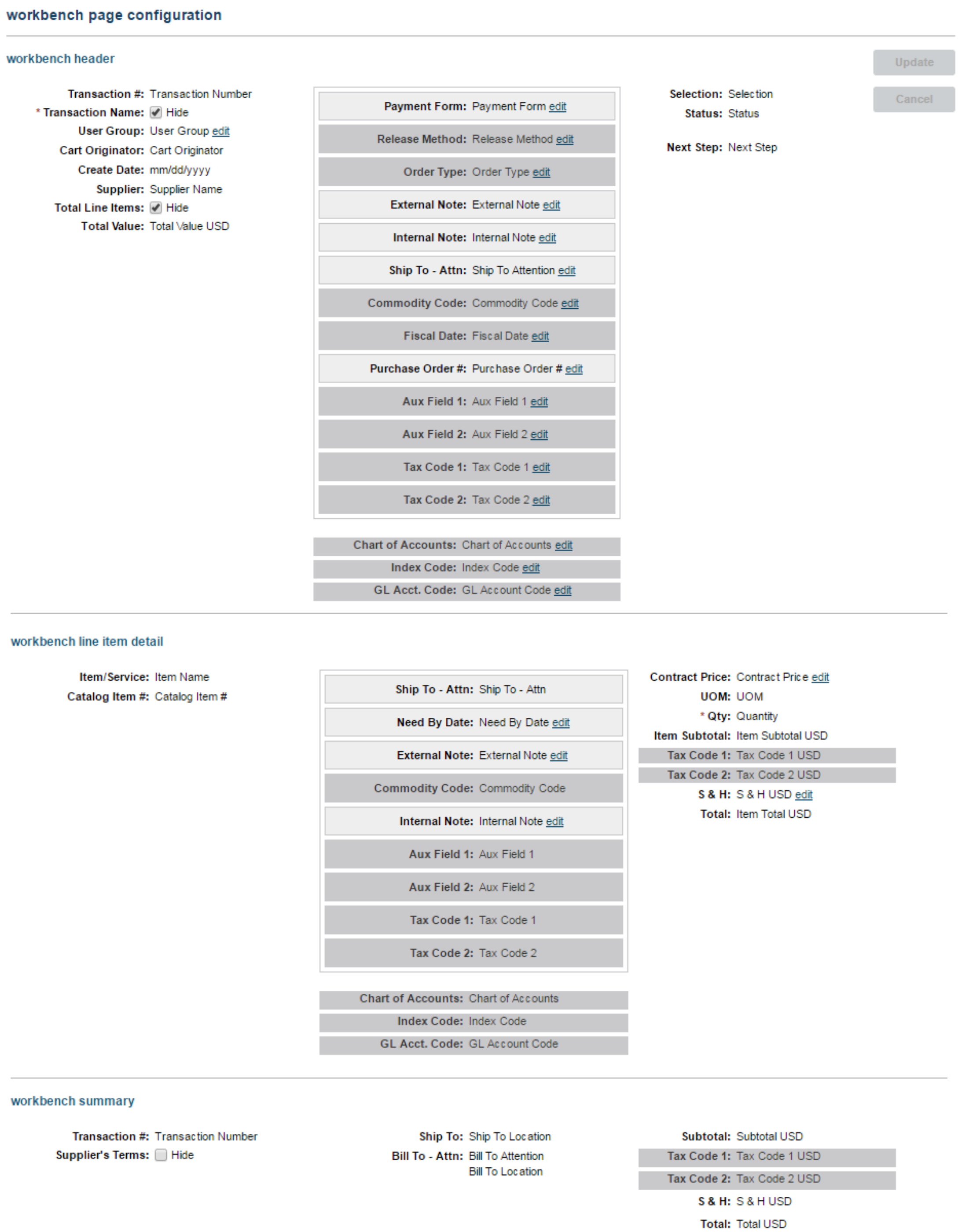
Under Catalog Visibility, the Sys Admin assigns catalogs via individual users or user groups. The Sys Admin can filter results by user/group name or visibility status.



Note: It is recommended that Sys Admins use User Groups for large amount of users.

Workbench Page Configuration

The Sys Admin can remove any fields displayed on the Checkout tab by selecting edit and checking Hide. The Sys Admin can also change any Field Names displayed on the Checkout tab by selecting Edit.

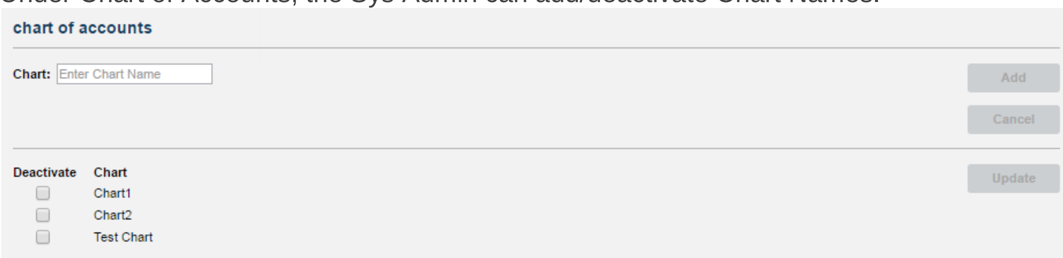


Note: The Sys Admin can build Aux Field 1 & 2 as Searchable Dropdown or Text Input.

Account Code Configuration

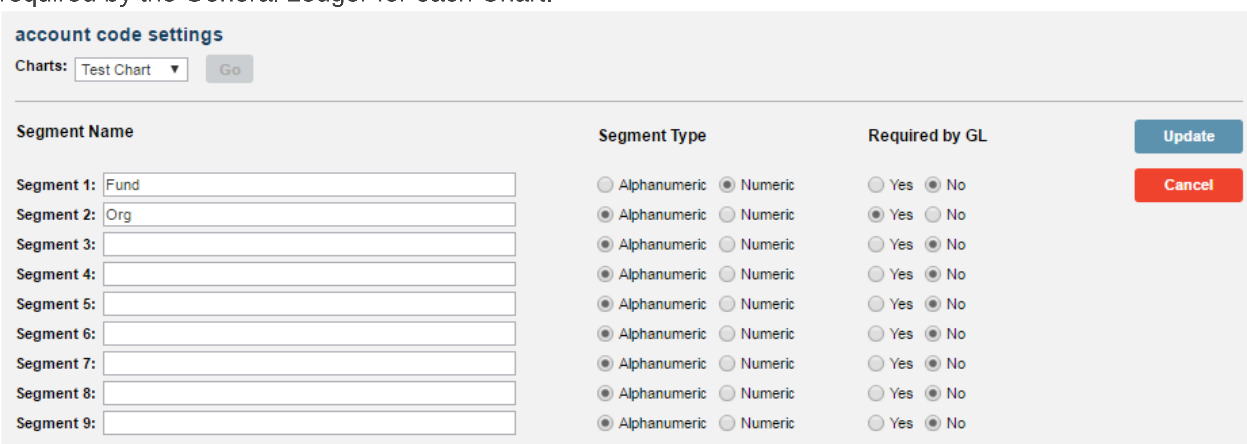
To import Account Codes, the Sys Admin can select the Import Account Code option or Import Management>Import Templates. Select Account Code from the Template Type.

Under Chart of Accounts, the Sys Admin can add/deactivate Chart Names.

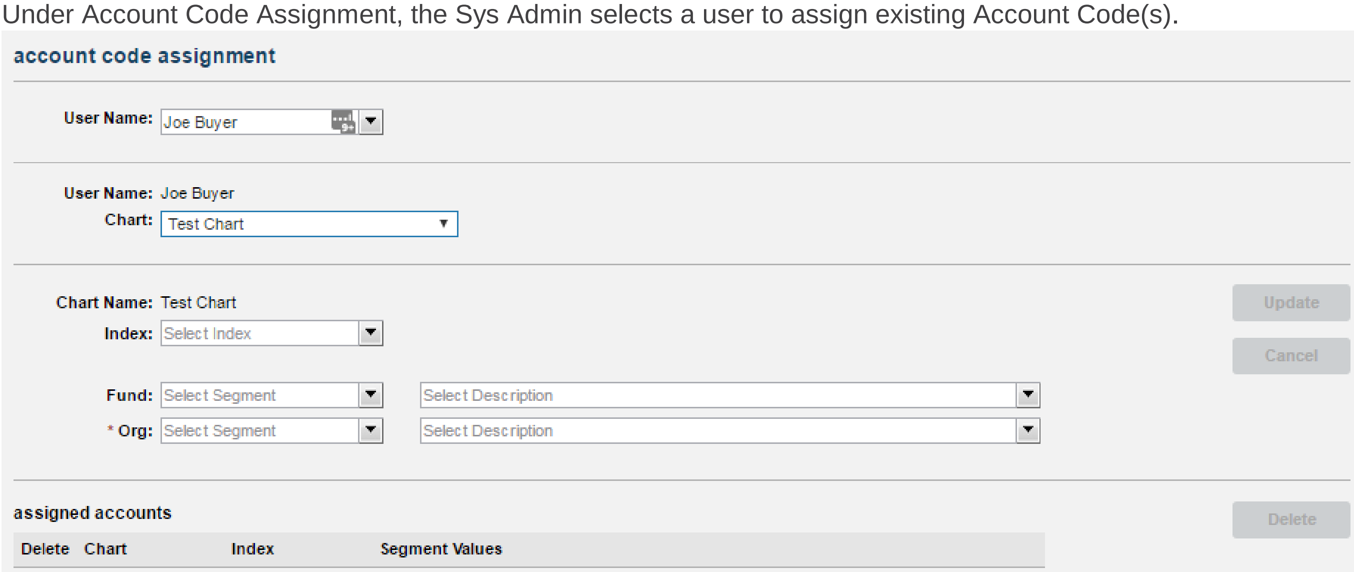


Note: The Sys Admin cannot delete any added Charts.

Under Account Code Settings, the Sys Admin enters segments (portion of the Account Code), their type, and if they are required by the General Ledger for each Chart.



Under Account Code Assignment, the Sys Admin selects a user to assign existing Account Code(s).

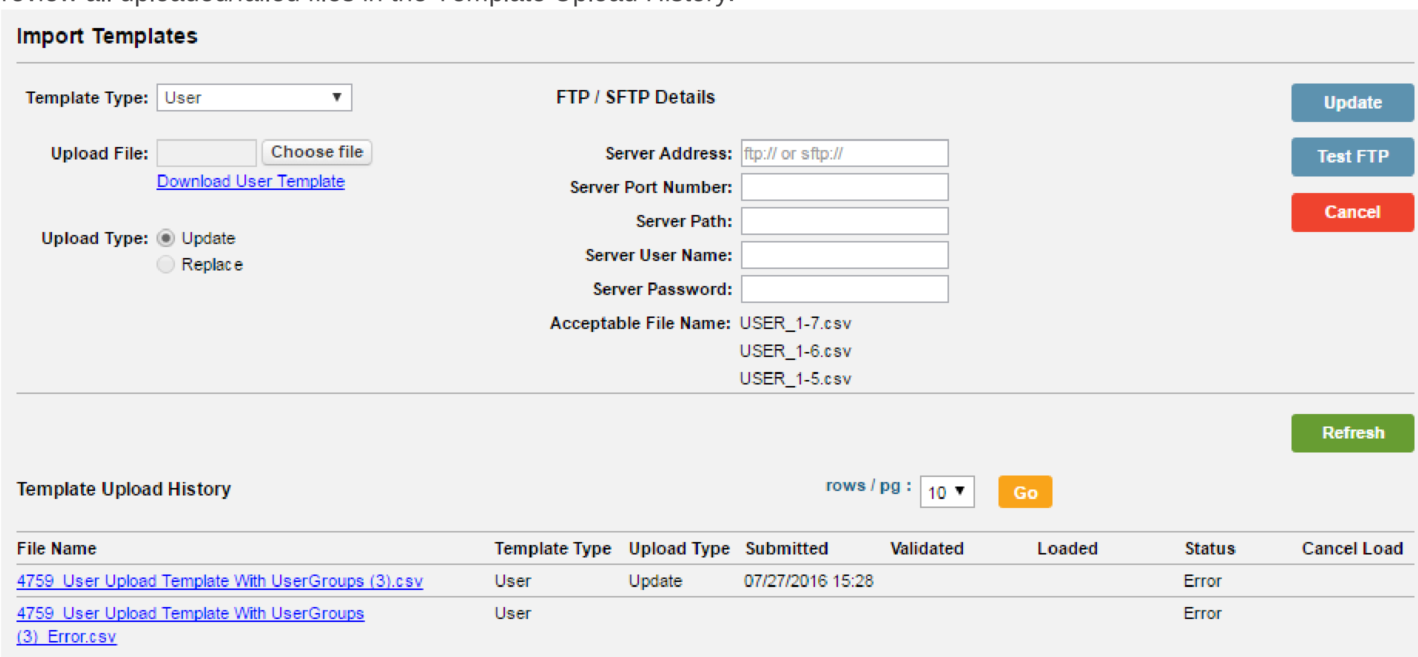


Reporting Configuration

Please see TheReporter Reference Guide for further instructions on these configuration settings and theReporter tool.

Import Management

Under Import Template, the Sys Admin can upload Account Assignment, Index Assignment, Account Code, Index Code, Account Favorites, Commodity Code, Location, Non-Catalog Supplier, User, Workflow/Notification, Aux Field 1 & 2, or Tax Code templates. The acceptable versions of templates can be downloaded using the link below Upload File. The Sys Admin can setup the FTP / SFTP Server or upload through the ESM Purchase environment. The Sys Admin can review all uploaded/failed files in the Template Upload History.



Under Cross References, the Sys Admin Can adjust the Reference Value for ESM Values of State and Country. The adjustment is typically made for General Ledger requirements.