Users – My Purchases View

Anyone can place an order within the purchasing application. When you log in the screen should resemble the following image, and the page lists current orders you have placed and their current statues.

Placing an Order
- To Place an order click the ‘Create New Order’ button.

New Orders through Purchasing Wizard – completed either by student or PI (Principal Investigator)

Personal Information
You will see your name in the drop down list in addition to users that have set you up as a Proxy.
Account Information
PIs have the ability to pick from your accounts assigned in to you in Chart of Accounts. Students please enter an account number you have been instructed to use for the purchase. Here is also an option to “View My Accounts” which display accounts used on past orders, or accounts for which you are assigned a user. Click “continue” to select/enter vendor information.

Vendor Information
Pick from vendor used on your previous requests/orders or department approved vendors. Or enter information for a new vendor. If for some reason you do not have the vendor address that is ok, however you must include the vendor name, and where possible, a URL. Click “continue” to enter items.
Items
Enter in the items you would like to have purchased. Select “Upload a quote” or “continue”.

Upload a quote
Enter each item from the quote as this allows the PI to view for approval. PI/Faculty placing their own order, may enter Quantity1 and total quote Price, then in Description indicate to "See Quote" and purchase all items:

Delivery Information
Pick a location you want to have items delivered to. During COVID, if wishing to have delivered to your residence click OTHER (off campus location) to add your location and address. As this is an exception to campus policy, please make this request as part of your Business Justification.
Review & Submit

Review and Submit Request. If the amount is under the department threshold it will go to the business office to place the order. Otherwise, it will go to the PI/Owner of the account entered for approval.

Request Completed

Upon Submitting your order, you will be directed to a page that shows your completed order. The page will also display where the order went; Business Office or Account User/Owner for approval.
Viewing your order
Click on the order number hyperlink to view order details, and the current status. When the order is completed the Requester will receive an email notification.
Faculty/PI Approvals

You will receive an email which requires order/account approval:

![Email screenshot showing order details and approval options.](image-url)
Available Approval Notifications

- Approve Order
- Reject Order

Note: This does not require you to log in, but will take you to a screen to enter in comment and submit approval or rejection.

Approving/Rejecting Orders

Click Submit to approve the order. Note: This does not require a comment.

Reject Order: Click this link to reject the order. Note: This does require a comment; the button to “Submit” your rejection requires a minimum of 6 characters, before it will become active.