eProcurement at UZH
"Purchase for You (P4U)"

New ordering/purchasing platform
for the institutes of UZH

Brief Instructions for Users

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**Directorate for Real Estate and
Facility Management**

University of Zurich
Supply Chain Management
Winterthurerstrasse 190
CH-8057 Zurich

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1 Introduction and Overview

1.1 Names

The new ordering platform is a standard product of the company Veenion. Within the course of 2017, it will replace the previous ordering platform of P&L after a usage period of seven years. The official name of the program on the market is "open ordering." For simplification, we will use only the UZH-internal project name "**P4U**" (Purchase for You).

1.2 Registration and Application

New purchasers are registered centrally by P&L. For registration, the application form must be downloaded from the UZH P&L homepage and filled out completely.

https://www.staff.uzh.ch/dam/jcr:1b270a6d-f6f1-4f26-a2a2-d01b84cbd488/Antragsformular%20P4U_EN_V3.0.pdf

The form must be filled out completely. In case of any questions, please contact:

- Beat Temperli (044 635 42 14, beat.temperli2@uzh.ch)
- Jan Caricato (044 635 40 56, jan.caricato@uzh.ch)
- Stefan Holliger (044 635 40 67, stefan.holliger@uzh.ch)
- René Kunz (044 635 41 02, rene.kunz@uzh.ch)

With the data on the application form, the users are entered and informed of the activation of their account in the system by P&L. Training is performed either by a key user from the respective institute or directly by P&L if the product is being introduced to an institute for the first time.

1.3 Login on the P4U Ordering Platform

To log in to P4U, you need access data (company, user name, and password). You can obtain these data after a successful application and before training, as well as a link to the P4U ordering platform (https://uzh.openordering.de/Ordering/Login/uzh). The company is derived from the first three numeric characters of your profit center (E.g., profit center DIB is 94400. → Company = 944). The user name corresponds with the user's UZH short name.

After opening your profile, you will be informed whether you are a single sign-on user or a non-single sign-on user.

Single sign-on User:

Press the Single sign-on button and you will be logged directly into the P4U.

Non-Single sign-on User:

The password is requested by the user by clicking "Forgot password". The requested password is sent by e-mail and must be changed at the first login.

- Enter the **Company name, Username, and password**. When entering the password, pay attention to case and special characters.
- Click the **Log in** button.

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1.4 System Menu in P4U

The structure of P4U is similar to Outlook. On the left side of the screen (B), you have access to the various functions of P4U through the system menu. They are divided into the following categories: My Purchase, My Tasks, Messages, etc. In the working area (C), the corresponding information is displayed depending on the function. You will find the search box (A) above the working area.
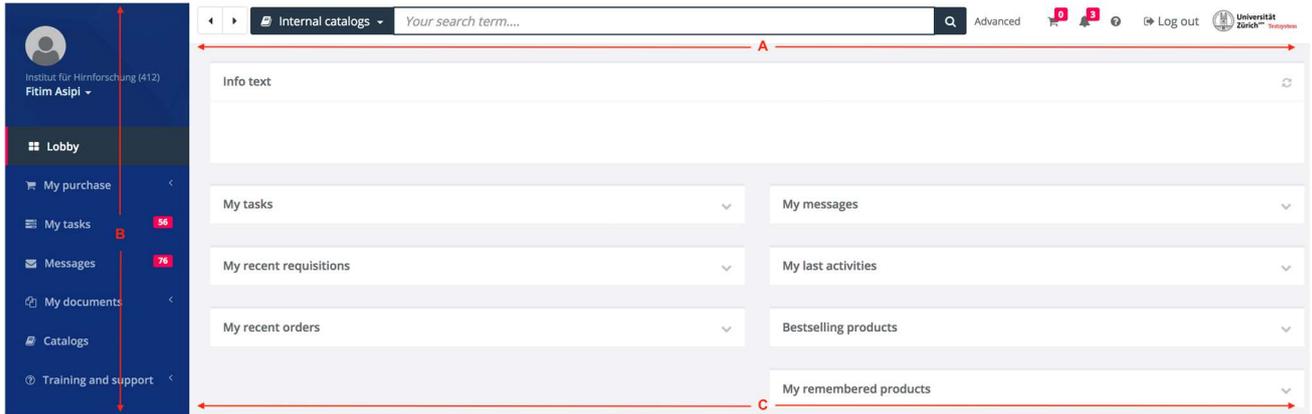

1.5 Title Bar

The title bar contains the following information:

- Product search within internal catalogues
- Link to the shopping cart
- Current order value of the shopping cart
- Notification indication
- Link to help
- Link to logout

1.6 Logout

To log out, click the Log out link at the top right.
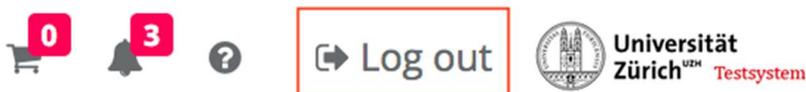
1.7 Profile

You will find the Profile menu item above the category. Here, you can manage your master data, create your new representative, or edit an existing representative under "Representatives".
Under "Settings", you can make certain format settings, such as the number of lines per page in a list.
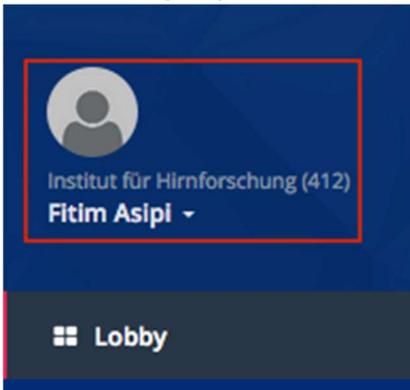
1.7.1 Changing Personal Settings and language

To edit your own profile, click your name at the top left. The management of the profile is divided into two areas: Settings and password change. All areas can be selected from a corresponding tab.
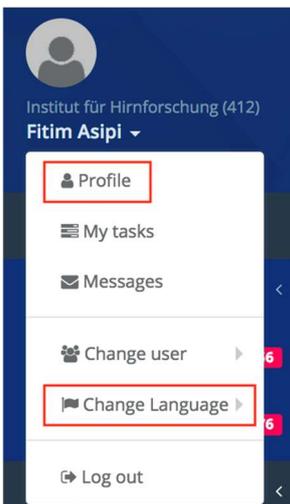
It is also possible to **change the language**. Please click into the menu "Change Language" and then choose your preferred language.

1.7.2 Change Password

You can change your password here. To do so, enter your old password and then the new password twice in the corresponding boxes. Click the Save button. Your entries are checked and must correspond with the requirements. Errors are registered immediately when saved using the button highlighted in green. If no errors have occurred, the new password is active immediately.

General	Profile Photo	Settings	**Change password**	Representatives	Activity	Summary

ⓘ Password guidelines
- The password must contain at least 8 characters
- You must include both upper- and lowercase characters
- You must include at least one number
- You must include at least one of the following special characters: !,@,#,$,%,^,&,*,?,_,~,-,/

Old password:	*Password*
Password:	*Password*
Confirm password:	*Password*

💾 Save

1.7.3 Settings

Here, you can individually adapt the formatting of tables and displays on each screen. We recommend that these settings not be changed, at least not in the initial phase.

General	Profile Photo	**Settings**	Change password	Representatives

General

Homepage	Contracts
Cacheduration Lobby (s)	300
Show and refresh count of informations (tasks, messages…)	☑

Format preferences

Number of rows in tables	30
Number of pages shown in pager	5
Number of subcategories shown in hierarchical view	7

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1.7.4 Creating / Changing Representatives

This tab contains a list of your representatives.

Three entries are required for successful representation: Representative, starting and end dates.

Only users already entered in the institute as active users may be selected as representative. The starting and end date defines the period in which you will be represented.

Note: Formal and financial representations can be adapted using this menu, but they are overwritten daily by the release table in SAP. This does not apply to junior and senior purchasers.

If both the representative and time period are entered, they can be saved.

Previously entered representatives are changed or deleted by clicking the selected button.

According to requirement, the menu item is selected and the corresponding action is taken.

1.7.5 Registration as representative

To register as a representative, the own profile with the name must be clicked on and continue with a click on "Change user".
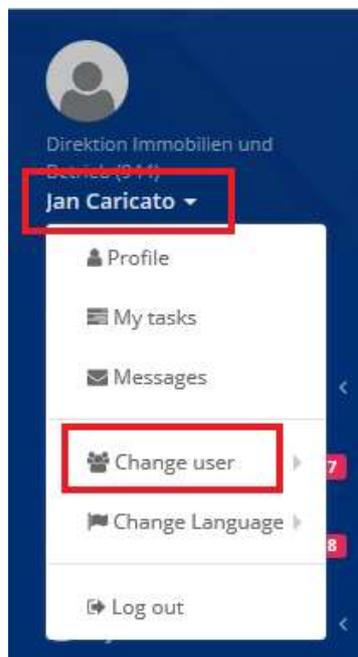
As a last step, you have to click on the button "register as representative" and you can perform the activities as a representative.
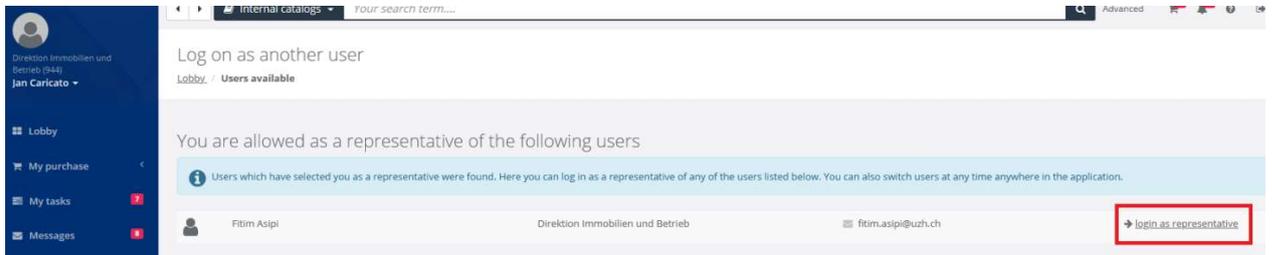
If you want to leave the substitution level, you can click on "Here" to return to your own user account.

2 Introduction and Overview

2.1 Working with the System Menu

2.1.1 Lobby
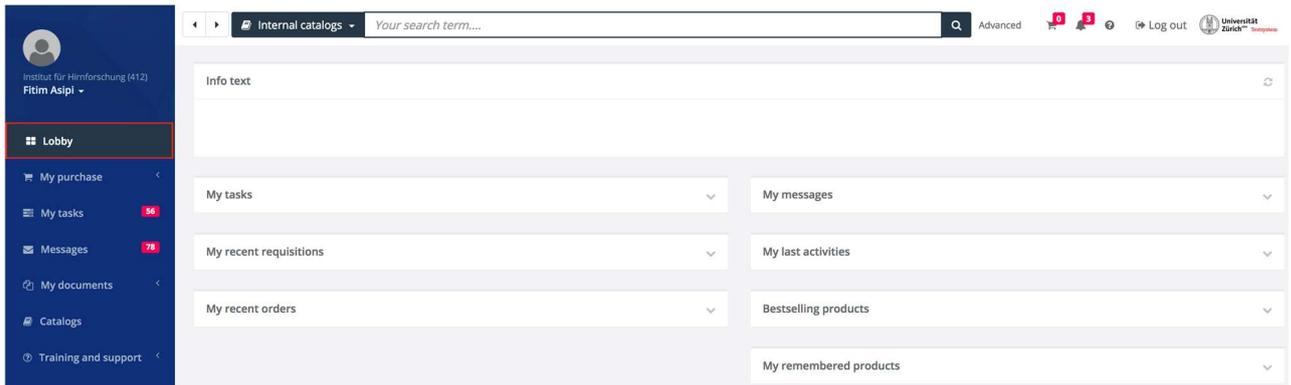
After you log in, your **lobby** will appear in the working area. You can call this view at any time under the "Lobby" category. Various information boxes (portlets / gadgets) are displayed in the lobby according to authorization.

You can design the lobby as you desire by moving information boxes. The settings you make are saved automatically.

You can start a cross-catalogue "search" (internal catalogues) in the lobby. You can only search in the catalogues for which you have authorization.

Depending on the configuration of your system and your rights, the following information boxes can be displayed:

- **My purchase**: information about all your purchases
- **My Tasks**: Tasks to be performed that are assigned to you
- **Messages**: Messages that you have received
- **Bestselling Products**: List of the products your institute purchase most
- **My recent Requisitions**: Overview of the purchase requests you have done
- **My recent Orders**: Overview of the orders you have initiated
- **My remembered Products**: List of products that you have added to your wishlist
- **My Last Activities**: Information regarding the latest activities in your system

2.1.2 Online Help

The button with the **question mark** located at the top right of the window offers useful help on current topics you are working on.
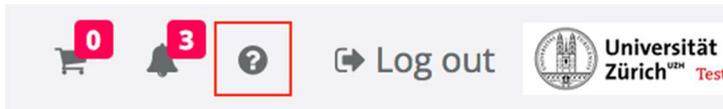
2.1.3 Closing the System Menu

By clicking ◄ ►, you can open or close the system menu on the left side, expanding the space available for the main window.

2.1.4 Arranging the Windows in the Lobby

You can individually arrange the categories to be shown to you in the main window. To do so, click in the gray frame of a menu bar as shown in the figure. The cursor changes. Keep the menu button pressed and then pull the window to the desired position and release the menu button again.
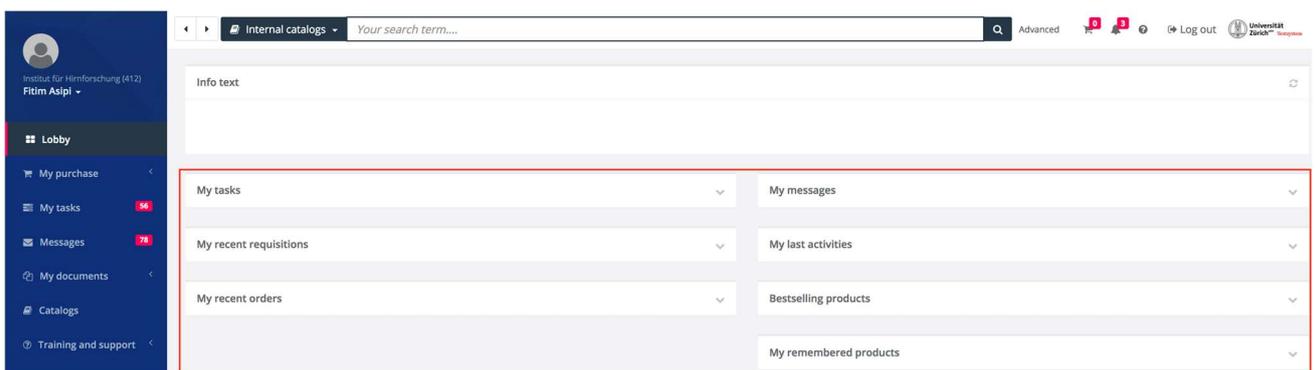
2.1.5 Displaying / Hiding and Updating Windows

To create the necessary space for essentials, you can minimize the content of the window in the lobby. To do so, click ︿ . To display the content, click ﹀ . You can update the contents of the window by clicking ↻ .

2.1.6 General Information on the System Menu

The system menu is divided into various categories such as My Purchase, My Tasks, or Messages, etc. Open a category by clicking ◄ . This action closes the currently opened category. To close a category, click ▼ The categories available to you depend on your authorizations.
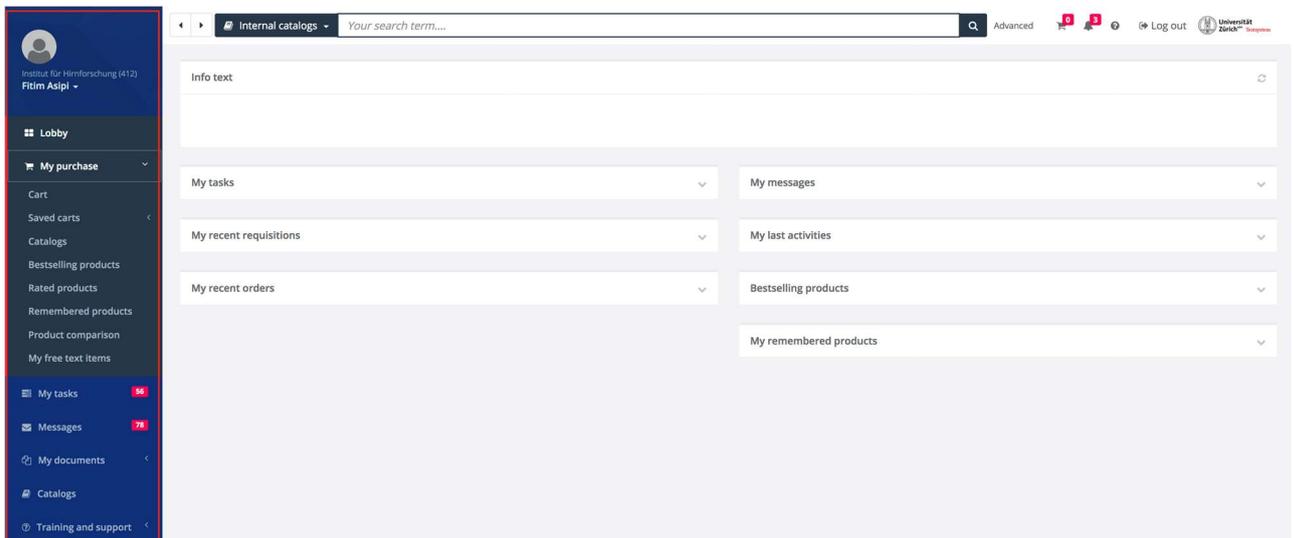
2.2 Search Box/Full-Text Search (Product Search)

The full-text search can be called from almost everywhere in the system. Before you enter a search term, the search box will automatically display a search term in gray. This search team will be relevant to the area (example: Internal Catalogs) in which you are located and which can be searched. The following figure shows a search for articles/products performed in all internal catalogs in the Catalogs area. Simply enter your search term and then click the button with the magnifying glass or press the Enter key. Even if the search is intelligent, correct spelling is decisive for the success of the search.

To search individual boxes in a targeted manner, click on Advanced:

If you don't find products, check the wording of the search again or maybe you will find the products in the online catalogs (OCI) of a supplier. In this case you choose the needed supplier by clicking the link in P4U. Now the system is starting to open the webshop of the chosen supplier and you can start to search again. You have to do this search by each online-catalog.

2.3 Working Area

The working area is your main window when working with P4U. This area shows the content, functions, and statuses of your activities. According to authorization, the main window can contain additional options, buttons, and tabs.

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3 Purchasing with P4U

3.1 My Purchase

Depending on your authorizations, the system menu provides various categories with additional functions divided into stages.
The "My Purchase" category contains the following functions:

3.1.1 Shopping Cart

Clicking the shopping cart displays the articles you have already placed in it. In addition, various information and functions will be made available to you.

3.1.1.1 Removing items from the shopping cart

You can remove items from the shopping cart by selecting the desired item and clicking the Remove selected products button. Alternatively, you can click [ ] next to an item and then select the Delete menu item.

3.1.1.2 Changing the order quantity

You can increase or decrease the order quantity of an item in the shopping cart in the Quantity column. Enter the new quantity in the corresponding field and click [ ] to update.

3.1.1.3 Saving the shopping cart

You can save a shopping cart that you will require in this or a similar form by clicking the Save Cart button. You will then find the shopping cart under My Purchase > Saved Carts.

3.1.1.4 Exporting the shopping cart
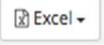
Clicking the [Excel ▾] export button exports the shopping cart and its items to an Excel file.

3.1.1.5 Placing the order

To place an order, select the "Start order process" button on the left. The order workflow now starts.

3.1.2 Saved Carts

You can save items that you want to reorder as a shopping cart. You can then find this shopping cart under Saved Carts.

3.1.3 Product Comparison

You can select articles in your search result and in the catalogues and add them to a comparison list. You will find the list under "Product Comparison".

3.1.4 My Free-Text Items

If you cannot find certain items in your catalogues, you can enter them as free-text items and send them to the Purchasing Department for further processing.

3.1.5 Creating Free-Text Items

In "My Purchase" under "My Free-Text Items", you can create free-text items and order existing ones. To create a new free-text item, click the "Create Free-Text item" button. When creating a free-text item, we recommend that you use copy and paste functions. You can paste all information found on the website of the supplier in the provided boxes. The more precise the information on the article, the faster an order can be processed.

You must complete the following boxes highlighted in red.

- Contract: Select the desired supplier. (If the desired supplier does not exist, so you can select the "allgemeiner Lieferant zur Freitexterfassung" [General supplier for free-text entry] contract.)

- Product number: Specify the complete article number of the supplier.

- Short text: Specify the description of the article in short-text form.

-Long text: In long-text form, you can specify the supplier that provides your product.

- Order unit: Here, you can select order units (E.g., "ST" [pc(s).] for piece(s)).

- Unit price: A unit price must be specified. If you do not know the exact price, enter an estimated price.

After you have completed all boxes, you can click "Save" and then "Back".

The free-text items then appears under "My Free-Text items". The article can be placed in the shopping cart and ordered.

3.1.6   Entering multiple free text articles as Excel

To create multiple free text articles you need a saved free text article, if you don't have one yet you need to create one using 3.1.5.
Once you have created it, you will find the article under "My free text articles".
Please add the article to the shopping cart.

After that go to the shopping cart.

Export the shopping cart.

Please save the Excel file and open it.
One position is currently available, which represents the created free text article.

Cart of user Direktion Immobilien und Betrieb \ Jan Caricato (State: 14/04/2021 14:16:18)

Position	Product number	Created on	Contract	Supplier	Type	Short text	Long text
1	555432	14/04/2021 13:56	Default contract	allgemeiner Lieferant	Free text item	OBI Schwerlast-Steckregal verzinkt Metall (HxBxT) 210	https://www.obi.ch/regale-rega

You need to expand the position with the free text articles you want to create.

Important:
The following deposits are mandatory:
Contract = Default contract
Supplier = allgemeiner Lieferant zur Freitexterfassung

Do not forget to specify the quantity/units/price and currency, which are listed to the right of the long text.

Cart of user Direktion Immobilien und Betrieb \ Jan Caricato (State: 14/04/2021 14:16:18)

Position	Product number	Created on	Contract	Supplier	Type	Short text	Long text
1	555432	14/04/2021 13:56	Default contract	allgemeiner Lieferant zur Freitexterfassung	Free text item	OBI Schwerlast-Steckregal verzinkt Metall (HxBxT) 210	https://www.obi.ch/regale-regall
2	4468955	14.04.2021 13:47	Default contract	allgemeiner Lieferant zur Freitexterfassung	Free text item	OBI Schwerlast-Steckregal Metall Anthrazit (HxBxT) 180 x	https://www.obi.ch/regale-regalb
3	5112685	14.04.2021 13:48	Default contract	allgemeiner Lieferant zur Freitexterfassung	Free text item	Einhell Akku-Bohrschrauber TC-CD 18/35	https://www.obi.ch/akkuschraube
4	4911640	14.04.2021 13:51	Default contract	allgemeiner Lieferant zur Freitexterfassung	Free text item	Bosch Schrauberbit-Set 12-tlg.	https://www.obi.ch/bit-sets/bosc

Once all items are listed, you need to save the file again.

Import the file into the shopping cart.

The products are now stored in your shopping cart and you must then continue as usual to complete the order.

3.1.7   My Tasks

The "My Tasks" category contains the tasks you are working on. Tasks are individual steps of the complete order process. They are assigned to a user or user group. Tasks include the allocation of an order request to an account or the authorization of this request. As long as you have not yet completed a task, the order process pauses at this point.

3.1.8   Messages

Users can send messages to each other. The message is displayed in the inbox of the recipient and then sent to the e-mail address entered in the respective profile. It can therefore also be received in external mail systems.

3.1.9   My Documents

In the My Documents category, you will find requests and orders. This area contains the corresponding documents.

3.1.10   Requisitions

Requisitions contains a list of the requests you have submitted.
In this overview, you will find information such as the creation date or the current status of your request.
Clicking "Requisitions" displays the corresponding overview in the working area.
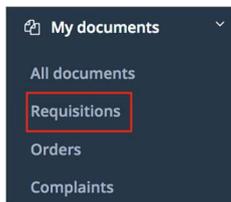
3.1.11   Orders

"Orders" contains a list of the orders you have made.
In this overview, you will find information such as the creation date, the current status of your order, or the supplier from which you have ordered the goods. Clicking an order takes you to the document overview.

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3.1.12 Document Overview

You can look for documents in the document overview. You can search for the purchaser name, supplier, or text of the order item in the search box, as well as filtering according to the date or status of the document. Enter your criteria and then click "Filter."

3.1.13 Order Documents

For a specific order, you can sometimes initiate additional processes such as a cancellation or goods receiving. You will find these processes on the top menu of the document.

Similar to the request document, you can also display various information about the document on tabs.

3.2 Catalogs

In the Catalogs groups, you can find all orders and connected catalogs for which you require authorization. Here, all catalogs are divided into groups. We differentiate between local (Catalog) and online catalogs (OCI).

When you select the top level, you also start a cross-catalogue search, as in the lobby. You can also make a targeted search in a certain catalogue by selecting this catalogue under **Catalogs** and then starting the search.

When selecting a supplier, you can take into account their sustainability assessment, which was carried out by Integrity Next. This is based on a self-disclosure of the supplier, among other things with regard to sustainability in the supply chain, human and labor rights or energy management. For this, look for the icon with the sheet below the catalogs. Click on the icon to see detailed information about the supplier's responses related to these topics.

Green icon 🌿:   Sustainability-Assessment fulfilled

Yellow icon 🌿:   Sustainability assessment partially fulfilled, certificates may have expired

Red icon 🌿:   Sustainability assessment not fulfilled, or forms not filled in correctly

Gray icon 🌿:   Sustainability assessment pending, in progress

3.3 My Tasks

3.3.1 Pending Tasks

You can find the tasks assigned to you in the lobby under "My Tasks" or you can select the "My Tasks > Pending Tasks" items from the system menu. In the example below, two financial checks must still be performed.

A pending task that is currently not being processed is labeled with "Waiting". A task that is currently being processed is labeled with "Processing" and the name of the current authorized user.
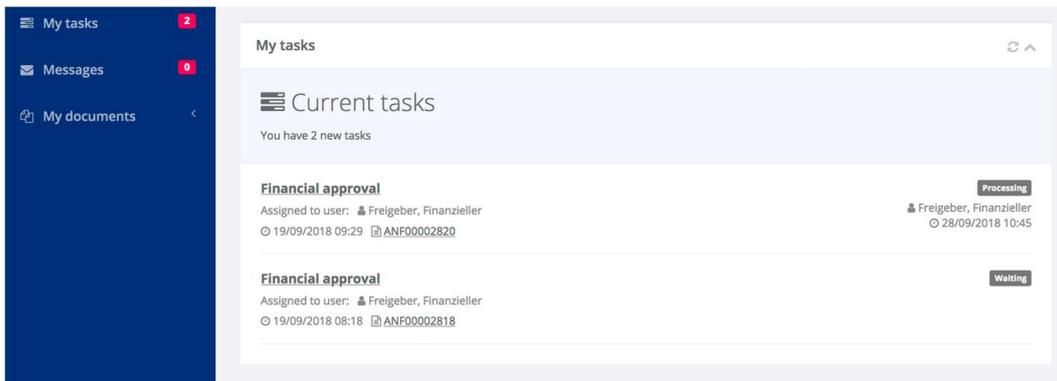

3.3.2 Editing the Task

To edit a task, proceed as follows:

Select a task and then click it. An additional window opens.
You can start processing the task by clicking the selected button. If you are not the only person authorized to process the task, click "Begin processing" on the menu bar. If only a single user is responsible for a task and not a group of people, the task is automatically set to "Processing" when opened. You can still end the processing of the task using the "End Processing" button and then resume processing at a later point in time using "Begin Processing" button. The processing time is stopped for the duration of the interruption.
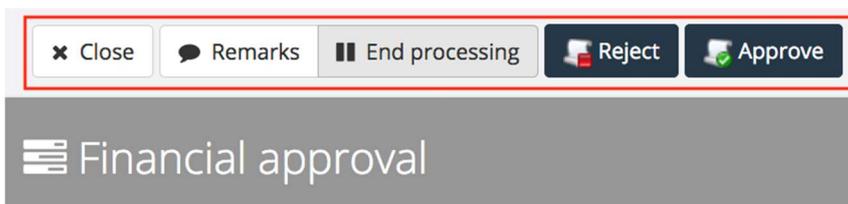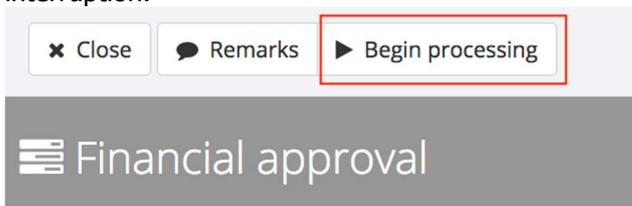
Close: This button closes the processing of the task. You remain the executor of the task, however, which means that no other user can take over the task.

Remarks: Under "Remarks, you can enter information that is then saved in the workflow log, where you can view it.

**End Processing**: This button closes the processing of the task. It can be taken over by other users.

If the processing of the task is in progress, as in the case of the example, the tasks can be released with **authorization** and completed in this manner. If you reject a task/release, you must enter a remark (reason for rejection).

Add Remark: Enter and save a text. You can close the remark window only using the "Close" button (to the far bottom right of the window; you might need to scroll down until it becomes visible).

3.4   Ordering Process

Before ordering

UZH would like to become more climate-friendly in the procurement of goods, such as office supplies or research equipment, and services. Therefore, we recommend that you ask yourself the following questions before making a new purchase and consider our alternatives to buying new:
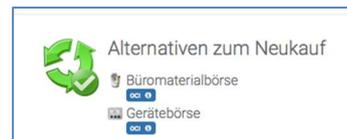
Is buying the product you want new avoidable?
Can I obtain or use the product via one of our platforms - office supply exchange, equipment exchange, shared equipment - and thereby save not only ecological but also financial resources?
Can I use the existing product a little longer?

3.4.1   Step 1: Fill the shopping cart

At several points in the system, you can add articles to the shopping cart:

- In the list of the search results
- In the list of the most sold products
- In the list of the evaluated products
- In the list of the products from the wishlist

A shopping cart can be filled in several stages. The previously made selections are respectively saved and are available at any time.
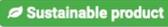
The symbol [Sustainable product] helps you to choose sustainable products. You can also set a filter for this symbol. In the long description of the product you can get more information about sustainability, among other things, for example:

> **ⓘ Long description**
> ECO / Nachhaltiges Produkt REFUTURA Einheitspapier der UZH, A3 hweiss matt, Recycling aus 100% 29.7 x 42cm, BB, 80GM2, Pack à 500 Blatt Recyclingpapier, hochweiss

For more information on sustainability aspects for individual product groups, please visit the following page: https://www.sustainability.uzh.ch/de/betrieb/beschaffung.html or contact the UZH sustainability team: info@sustainability.uzh.ch.

### 3.4.2 Step 2: Open the shopping cart

Open the shopping cart by clicking the shopping cart on the title bar.
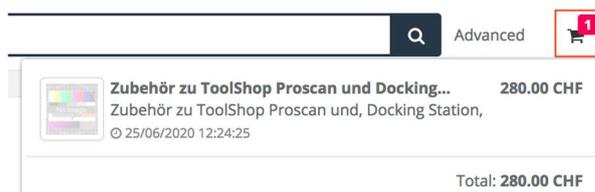
The shopping cart itself provides an overview of all items contained therein.

3.4.3 Step 3: Start the order process

At the start of the order process, click the "Start order process" button.
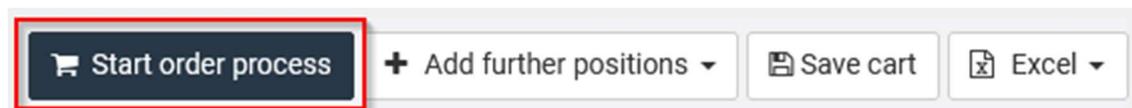
The shopping cart now contains a request that has to be either further processed and/or authorized. The order process (expert/basic process) steers which additional steps are necessary and who must take them through the tasks assigned to the employees responsible.

3.4.4 Step 4: Edit the addresses

In this step, you have the task of checking the addresses and adapting them if necessary.

Address types:

- **Shipping Address**:   Address to which the supplier delivers (e.g., the postal address of an institute)

- **Consignee**:   Recipient of the delivery

- **Invoice Address**:   Cannot be changed; required field.

To change a shipping address, click "Select another delivery address" and select another shipping address.
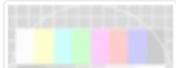
The delivery address must contain a location code so that the order can be forwarded.

If your request is correctly addressed, click the **For accounting** button.

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3.4.5   Step 5: Allocate the order request to an account

If no account allocation information is prefilled, you must enter it. This is not required for the junior purchaser, but becomes mandatory if the senior purchaser has to perform a release.

Select "Add Allocation". If an account allocation is already prefilled, you must first delete this setting.

Under **Allocation Type**, you must first choose between "Kostenstelle" and "PSP element".

Entering the cost center / PSP element: If at least three digits are entered, all cost elements for which authorizations have been provided are displayed.

The general account is derived from the product through eClassification. It does not have to be edited. Once all account allocations are set, click the **Submit order** button.

3.4.6   Step 6: Release the order request

You can complete the request process using the "Submit order". A priority order release now follows depending on the selected process (expert / basic).

On the lobby screen, you can obtain information on which tasks follow and which user or user groups will assume them. An authorization may be required, for example. In this case, you will be informed as to who must authorize the order request.

You will find the order request with the current status under "My documents" > "Requisitions".

If no authorization or other task is required, one or more orders are generated and automatically sent to the supplier. You will find the order under "My documents" > "Orders" (No. 4700******) .

3.5   Approval Process

If an authorization is required for an order request, someone authorized to do so must approve it. If use the Basic-Process there is only an approval for the buyer Junior necessary. The Expert-Process requires a full approval (formal and financial). To approve an order request, enter the list of your tasks through "My Tasks" > "Pending Tasks". For more information, also see Chapter 3.3.

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### 3.5.1   Authorizing the Order Request

To authorize an order request with all items, click the "Approve" button. In this way, you can authorize all items with a single click.
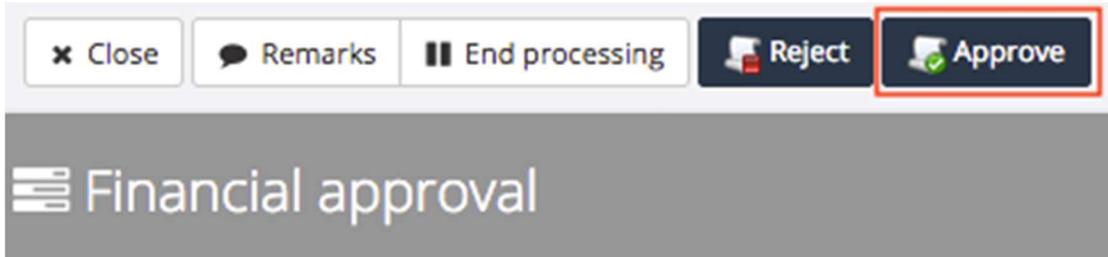
3.5.2   Rejecting the Order Request

To reject an order request with all items, click the "Reject" button. A rejected request returns to the purchaser.

Note: A rejection always requires a reason. You can enter the reason under "Remarks" (see Chapter 3.3.2.)
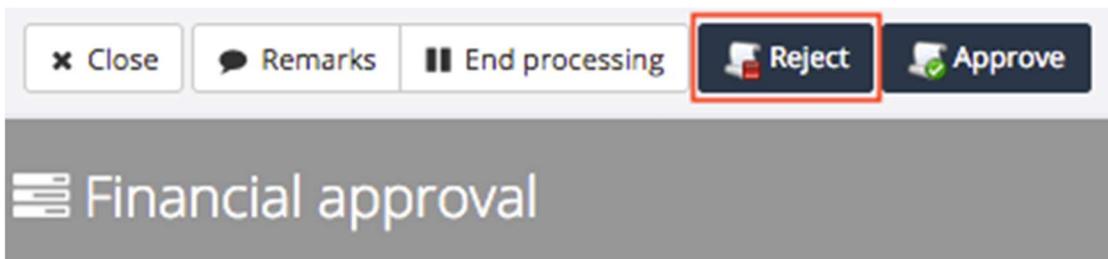

3.6   Goods Receiving Process (Expert-Process only!)

The goods receiving process is mandatory. You can book it only if you are in the expert process. The goods receiving process is divided into three steps:

3.6.1   Step 1: Create a Goods Receiving Process

Through "My Documents > Orders", switch to the list of orders. Under the order for which you want to create a goods receiving process, click [icon] and select the "Book Goods Receiving" menu item.

You can also create a goods receiving process directly from the order by clicking the "Book Goods Receiving" button.
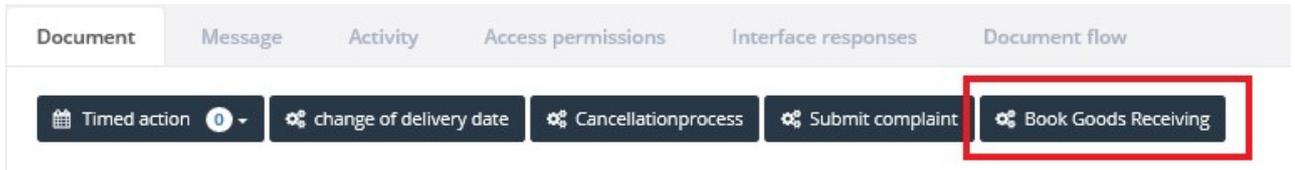
If you receive a reminder email for the goods receipt booking, the task can be found under "My Tasks; Pending Tasks" with the name "Goods receipt booking".
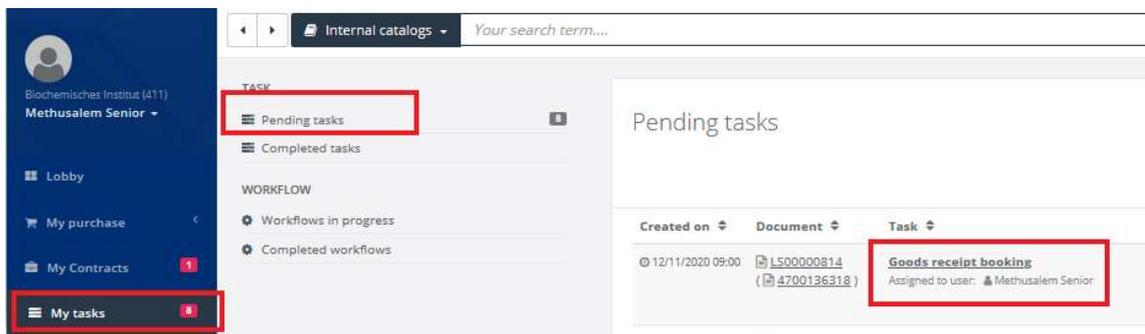
3.6.2 Step 2: Enter the Goods Receiving Process

You can enter a goods receiving process directly after creation. Alternatively, you can switch to the list of tasks through "My Tasks > Pending Tasks" and select the "Enter Goods Receiving" task for the appropriate order number.

A goods receiving process includes information on the delivery note number, inspection of the delivered goods, and entry of the quantity (only in the case of partial deliveries). In case of a complete delivery, you can assume the quantities with a single click. Goods receiving takes place according to your requirements entered in the corresponding boxes.

Complete delivery

A complete delivery must be completed as follows.

Partial delivery

A partial delivery must be completed as follows.

3.6.3 Step 3: Book the Goods Receiving

To book the goods receiving, click the "Book" button in the header of the "Goods Receiving" dialogue box. This action completes the task and correctly books it in the SAP system of UZH.