



# **eProcurement at UZH**

## **“Purchase for You (P4U)”**

New ordering/purchasing platform  
for the institutes of UZH

## **Brief Instructions for Users**

Authors: Fitim Asipi / René Kunz / Jan Caricato / Beat Temperli

Date: 26.03.2024

Version: Benutzerhandbuch\_P4U\_UZH\_V1.40\_EN



## Table of Contents

<b>1</b>	<b>Introduction and Overview</b>	<b>4</b>
1.1	Names	4
1.2	Registration and Application	4
1.3	Login on the P4U Ordering Platform	4
1.4	System Menu in P4U	6
1.5	Title Bar	6
1.6	Logout	6
1.7	Profile	7
1.7.1	Changing Personal Settings and language	7
1.7.2	Change Password	7
1.7.3	Settings	8
1.7.4	Creating / Changing Representatives	9
1.7.5	Registration as representative	10
<b>2</b>	<b>Introduction and Overview</b>	<b>12</b>
2.1	Working with the System Menu	12
2.1.1	Lobby	12
2.1.2	Online Help	13
2.1.3	Closing the System Menu	13
2.1.4	Arranging the Windows in the Lobby	13
2.1.5	Displaying / Hiding and Updating Windows	14
2.1.6	General Information on the System Menu	14
2.2	Search Box/Full-Text Search (Product Search)	15
2.3	Working Area	15
<b>3</b>	<b>Purchasing with P4U</b>	<b>16</b>
3.1	My Purchase	16
3.1.1	Shopping Cart	16
3.1.2	Saved Carts	16
3.1.3	Product Comparison	16



3.1.4	My Free-Text Items .....	17
3.1.5	Creating Free-Text Items .....	17
3.1.6	Entering multiple free text articles as Excel.....	18
3.1.7	My Tasks .....	21
3.1.8	Messages.....	21
3.1.9	My Documents.....	21
3.1.10	Requisitions.....	21
3.1.11	Orders.....	21
3.1.12	Document Overview .....	22
3.1.13	Order Documents.....	22
3.2	Catalogs .....	23
3.3	My Tasks.....	24
3.3.1	Pending Tasks .....	24
3.3.2	Editing the Task .....	24
3.4	Ordering Process .....	25
3.4.1	Step 1: Fill the shopping cart.....	25
3.4.2	Step 2: Open the shopping cart .....	26
3.4.3	Step 3: Start the order process .....	26
3.4.4	Step 4: Edit the addresses .....	26
3.4.5	Step 5: Allocate the order request to an account.....	28
3.4.6	Step 6: Release the order request .....	28
3.5	Approval Process .....	28
3.5.1	Authorizing the Order Request .....	29
3.5.2	Rejecting the Order Request.....	29
3.6	Goods Receiving Process (Expert-Process only!) .....	29
3.6.1	Step 1: Create a Goods Receiving Process .....	29
3.6.2	Step 2: Enter the Goods Receiving Process.....	30
3.6.3	Step 3: Book the Goods Receiving .....	32



# 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](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](mailto:beat.temperli2@uzh.ch))
- Jan Caricato (044 635 40 56, [jan.caricato@uzh.ch](mailto:jan.caricato@uzh.ch))
- Stefan Holliger (044 635 40 67, [stefan.holliger@uzh.ch](mailto:stefan.holliger@uzh.ch))
- René Kunz (044 635 41 02, [rene.kunz@uzh.ch](mailto: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:

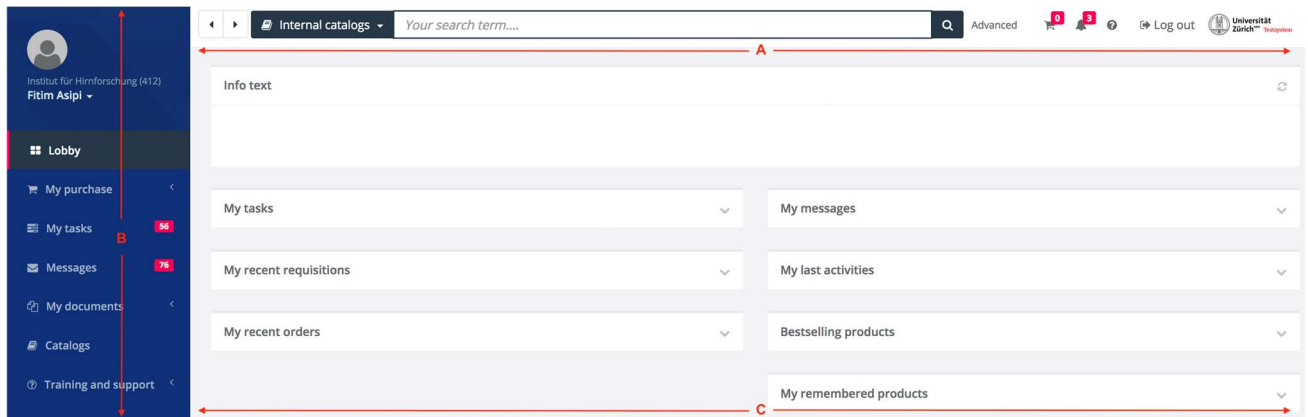
The password is requested by the user by clicking "Forgot password". The requested password is sent by e-mail and must be changed at the first login.

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



## 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

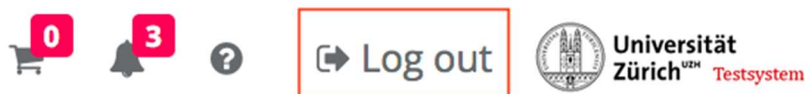
The title bar contains the following information:



- 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

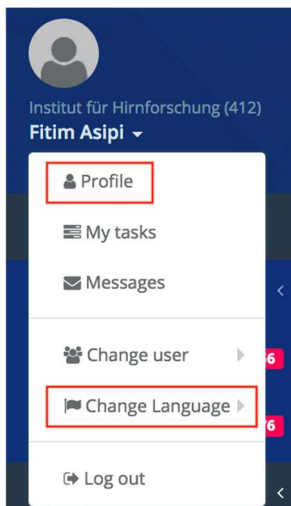
You will find the Profile menu item above the category. Here, you can manage your master data, create your new representative, or edit an existing representative under "Representatives".

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

**i 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:

Confirm password:

### 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

Cacheduration Lobby (s)

Show and refresh count of informations (tasks, messages...)

Format preferences

Number of rows in tables

Number of pages shown in pager

Number of subcategories shown in hierarchical view





### 1.7.4 Creating / Changing Representatives

This tab contains a list of your representatives.

General Profile Photo Settings Change password **Representatives**

+ Create

**i** No entries found

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.

Representative

User

Start date

End date

**Max Aldrich (sigma)**

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

Representative x

User

Start date

End date

Mail configuration

General message  Cart notification

Task creation  Freetext notification

Task escalation  Remark notification

Workflow message

Select all /  Deselect all

**Save** Close



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

General	Profile Photo	Settings	Change password	Representatives	Activity	Summary
<b>+ Create</b>						
Name	Company	E-Mail	Start date	End date		
Benjamin Junior 1	Institut für Hirnforschung	fitim.aspi@uzh.ch	25/02/2020	25/02/2020		

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

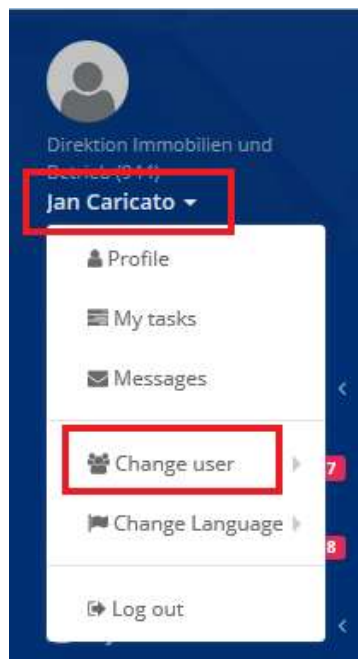
Start date	End date	
25/02/2020	25/02/2020	

Edit

Delete

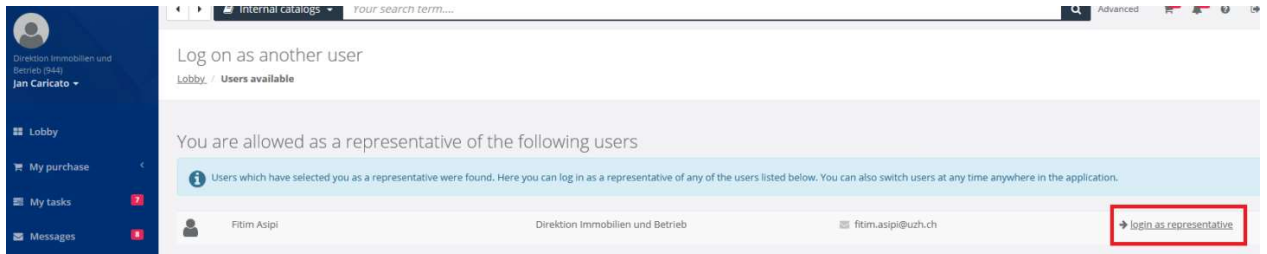
### 1.7.5 Registration as representative

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.

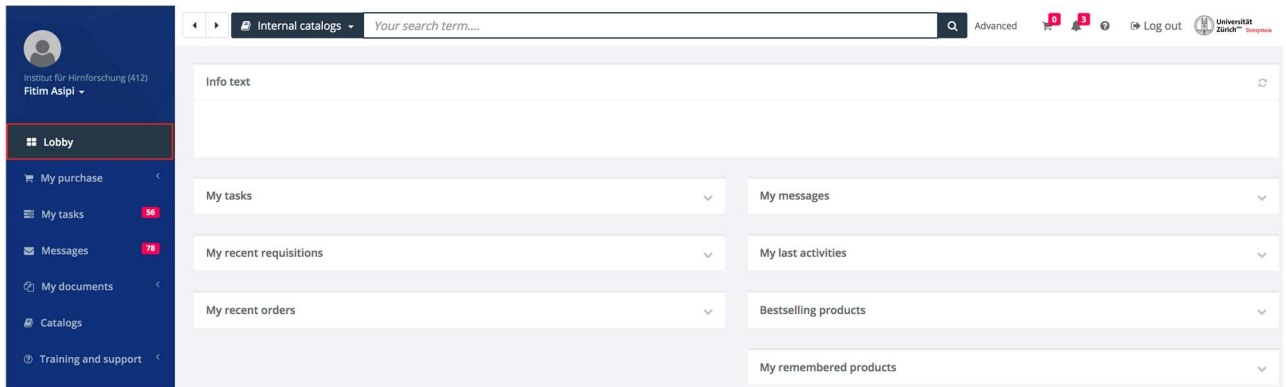




## 2 Introduction and Overview

### 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.

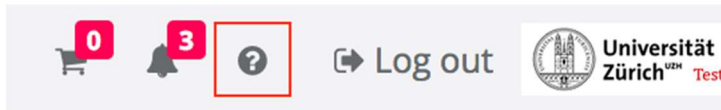
Depending on the configuration of your system and your rights, the following information boxes can be displayed:

- **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.



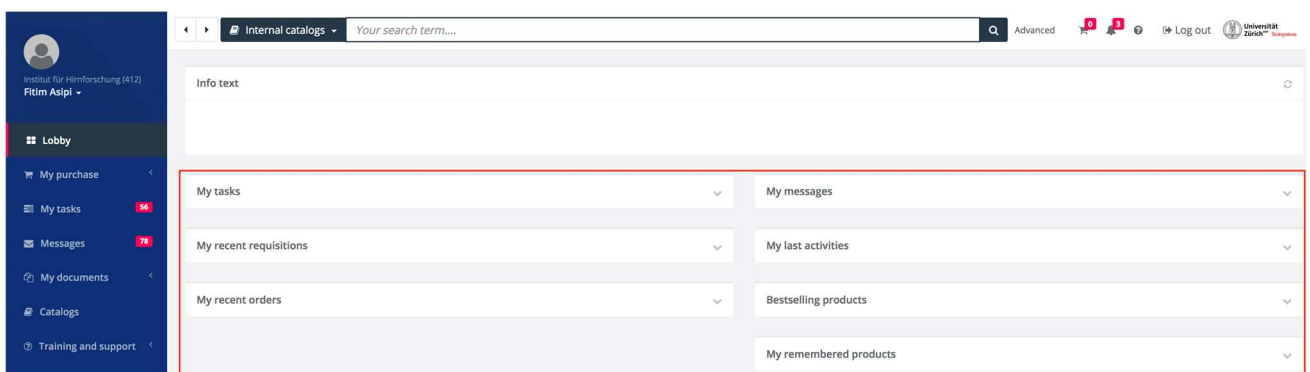
### 2.1.3 Closing the System Menu

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.





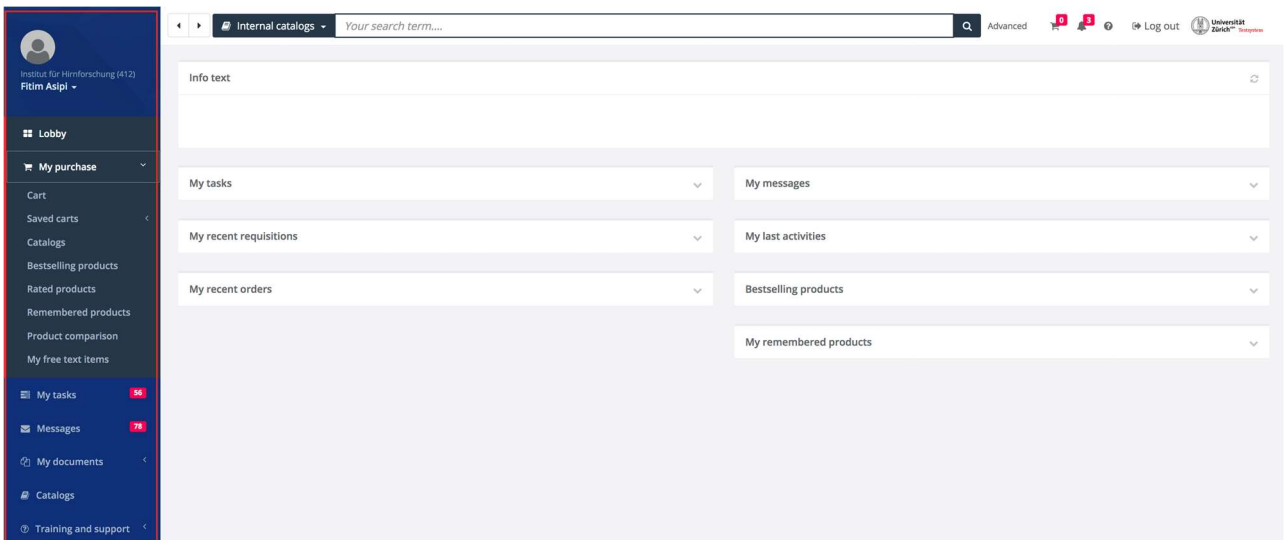


### 2.1.5 Displaying / Hiding and Updating Windows

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 term 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.

Order ID	Date	Supplier	Price	Status
4700087026	26/02/2020 15:55	Takara Bio Europe... Takara Bio Europe S.A.S. (Cat)	540.90 CHF	ordered at supplier
4700087025	26/02/2020 15:55	Takara Bio Europe... Takara Bio Europe S.A.S. (Cat)	1,365.30 CHF	ordered at supplier
4700087024	26/02/2020 15:54	Takara Bio Europe... Takara Bio Europe S.A.S. (Cat)	366.90 CHF	ordered at supplier
4700087023	26/02/2020 12:14	Illumina Switzerl... Illumina Switzerland GmbH (Cat)	1,073.00 \$	ordered at supplier
4700087022	26/02/2020 12:13	Illumina Switzerl... Illumina Switzerland GmbH (Cat)	1,073.00 \$	ordered at supplier



## 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  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.

	Product number	Description	Est. delivery date	Contract	Unit price
<input type="checkbox"/>	555432	Holzfluss für Ahorntisch Tisch geschliffen mit Orangenöl	02/03/2020	Default contract Digitec Galaxus AG (OCI)	136.70 CHF / 1 STK (Min.:1 STK)
<input type="checkbox"/>	0915	Test Artikel Testing	02/03/2020	Default contract allgemeiner Lieferant zur Freitexterfassung	15.55 CHF / 1 STK (Min.:1 STK)
<input type="checkbox"/>	234508-2.5KG	Potassium Phosphate xxx	02/03/2020	Default contract Sigma-Aldrich Chemie GmbH (OCI)	0.00 CHF / 1 STK (Min.:1 STK)

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".

Contract\*

Product number\*

Short text\*

Long text\*

Manufacturer pid / Name

Unit price\* / Order unit\*

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

My free text items

Lobby / My purchase / My free text items

My Freetext						
<input type="button" value="+ Create free text item"/> <input type="button" value="Remove selected products"/> <input type="button" value="Add to cart"/>						
	Product number	Description	Est. delivery date	Contract	Unit price	
<input checked="" type="checkbox"/>	555432	Holz fuss für Ahorn tisch Tisch geschliffen mit Orangenöl	02/03/2020	Default contract Digitec Galaxus AG (OCI)	136.70 CHF / 1 STK (Min:1 STK)	

### 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.

My free text items

Lobby / My purchase / My free text items

My Freetext						
<input type="button" value="+ Create free text item"/> <input type="button" value="Delete selected products"/> <input type="button" value="Add to cart"/>						
	Product number	Description	Est. delivery date	Contract	Unit price	
<input checked="" type="checkbox"/>	555432	OBI Schwerlast-Steckregal verzinkt Metall (HxBxT) 210 x 100 x 50 cm <a href="https://www.obich/regale-regalboeden/obi-schwerlast-steckregal-verzinkt-metall-hxbxt-210-x-100-x-50-cm/p/4527677">https://www.obich/regale-regalboeden/obi-schwerlast-steckregal-verzinkt-metall-hxbxt-210-x-100-x-50-cm/p/4527677</a>	16/04/2021	Default contract allgemeiner Lieferant zur Freetexterfassung	69.00 CHF / 1 STK (Min:1 STK)	



After that go to the shopping cart.




Export the shopping cart.

Cart

Lobby / My purchase / Cart

+ Add further positions Save cart **Excel** Export Import

Number	Contract
<input type="checkbox"/> 555432 	<b>1. OBI Schwerlast-Steckregal verzinkt Metall (HxBxT) 210 x 100 x 50 cm</b> <a href="https://www.obi.ch/regale-regalboeden/obi-schwerlast-steckregal-verzinkt-metall-hxbxt-210-x-100-x-50-cm/p/4527677">https://www.obi.ch/regale-regalboeden/obi-schwerlast-steckregal-verzinkt-metall-hxbxt-210-x-100-x-50-cm/p/4527677</a> Free text item

Default contract  
allgemeiner Lieferant zur Freitexterfassung

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	<a href="https://www.obi.ch/regale-regalboeden/obi-schwerlast-steckregal-verzinkt-metall-hxbxt-210-x-100-x-50-cm/p/4527677">https://www.obi.ch/regale-regalboeden/obi-schwerlast-steckregal-verzinkt-metall-hxbxt-210-x-100-x-50-cm/p/4527677</a>

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	<a href="https://www.obi.ch/regale-regalboeden/obi-schwerlast-steckregal-verzinkt-metall-hxbxt-210-x-100-x-50-cm/p/4527677">https://www.obi.ch/regale-regalboeden/obi-schwerlast-steckregal-verzinkt-metall-hxbxt-210-x-100-x-50-cm/p/4527677</a>
2	4468955	14.04.2021 13:47	Default contract	allgemeiner Lieferant zur Freitexterfassung	Free text item	OBI Schwerlast-Steckregal Metall Anthrazit (HxBxT) 180 x	<a href="https://www.obi.ch/regale-regalboeden/obi-schwerlast-steckregal-metall-anthrazit-180-x-100-x-50-cm/p/4527677">https://www.obi.ch/regale-regalboeden/obi-schwerlast-steckregal-metall-anthrazit-180-x-100-x-50-cm/p/4527677</a>
3	5112685	14.04.2021 13:48	Default contract	allgemeiner Lieferant zur Freitexterfassung	Free text item	Einhell Akku-Bohrschrauber TC-CD 18/35	<a href="https://www.obi.ch/akkuschraube-einhell-akku-bohrschrauber-tc-cd-18-35">https://www.obi.ch/akkuschraube-einhell-akku-bohrschrauber-tc-cd-18-35</a>
4	4911640	14.04.2021 13:51	Default contract	allgemeiner Lieferant zur Freitexterfassung	Free text item	Bosch Schrauberbit-Set 12-tlg.	<a href="https://www.obi.ch/bit-sets/bosch-schrauberbit-set-12-tlg">https://www.obi.ch/bit-sets/bosch-schrauberbit-set-12-tlg</a>

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



Import the file into the shopping cart.

## Cart

Lobby / My purchase / Cart

+ Add further positions ▾ Save cart Excel ▾

Export  
Import

	Number	Contract	Unit price	Quantity
<input type="checkbox"/>	555432	1. <b>Holzfuss für Ahorntisch</b> Tisch geschliffen mit Orangenöl <a href="#">Free text item</a>	Default contract allgemeiner Lieferant zur Freitexterfassung 136.70 CHF / 1 STK (Min:1 STK) VAT: 7.7 %	1

Kopie von Warenkorb.xlsx  
10.9 KiB  
Remove

Upload Remove all

Note: Only files with an "\*.xlsx" extension may be uploaded!

Start import Close

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

## Cart

Lobby / My purchase / Cart

+ Add further positions ▾ Save cart Excel ▾

	Number	Description	Contract	Unit price	Qu.
<input type="checkbox"/>	555432	1. <b>Holzfuss für Ahorntisch</b> Tisch geschliffen mit Orangenöl <a href="#">Free text item</a>	Default contract allgemeiner Lieferant zur Freitexterfassung	136.70 CHF / 1 STK (Min:0.0001 STK) VAT: 7.7 %	
<input type="checkbox"/>	555432	2. <b>Holzfuss für Ahorntisch</b> Tisch geschliffen mit Orangenöl <a href="#">Free text item</a>	Default contract allgemeiner Lieferant zur Freitexterfassung	136.70 CHF / 1 STK (Min:0.0001 STK) VAT: 7.7 %	
<input type="checkbox"/>	555432	3. <b>Holzfuss für Ahorntisch</b> Tisch geschliffen mit Orangenöl <a href="#">Free text item</a>	Default contract allgemeiner Lieferant zur Freitexterfassung	136.70 CHF / 1 STK (Min:0.0001 STK) VAT: 7.7 %	
<input type="checkbox"/>	555432	4. <b>Holzfuss für Ahorntisch</b> Tisch geschliffen mit Orangenöl <a href="#">Free text item</a>	Default contract allgemeiner Lieferant zur Freitexterfassung	136.70 CHF / 1 STK (Min:0.0001 STK) VAT: 7.7 %	



### 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.

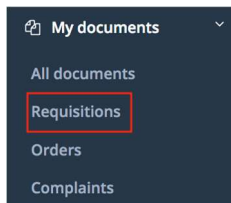
### 3.1.9 My Documents

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.

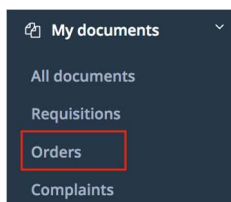
In this overview, you will find information such as the creation date or the current status of your request. Clicking "Requisitions" displays the corresponding overview in the working area.



### 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.





### 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."

The screenshot shows the 'Requisitions' page. On the left is a navigation menu with options like 'Lobby', 'My purchase', 'My tasks', 'Messages', 'My documents', 'Orders', 'Complaints', 'Delivery notes', 'Goods receipts', and 'Catalogs'. The main content area has a search bar at the top with 'Your search term...' and a 'Filter' button. Below the search bar is a table with columns: Document, Orders, Created on, Description, Status, and Price. The table lists several requisitions, all with a status of 'functionally approved'.

Document	Orders	Created on	Description	Status	Price
ANF00003316	4700087026	26/02/2020 15:53	Methusalem Senior	functionally approved	540.90 CHF
ANF00003315	4700087025	26/02/2020 15:51	Methusalem Senior	functionally approved	1,365.30 CHF
ANF00003314	4700087024	26/02/2020 15:50	Methusalem Senior	functionally approved	366.30 CHF
ANF00003313	4700087023	26/02/2020 12:13	Methusalem Senior	functionally approved	1,073.00 CHF
ANF00003312	4700087022	26/02/2020 12:12	Methusalem Senior	functionally approved	1,073.00 CHF
ANF00003311	4700087021	26/02/2020 12:11	Methusalem Senior	functionally approved	1,073.00 CHF
ANF00003310	4700087020	26/02/2020 12:09	Methusalem Senior	functionally approved	1,073.00 CHF
ANF00003309	4700087019	26/02/2020 12:06	Methusalem Senior	functionally approved	1,073.00 CHF
ANF00003308	4700087018	26/02/2020 11:15	Methusalem Senior	functionally approved	18.90 CHF

### 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.

The screenshot shows the 'Orders' page. The navigation menu is similar to the previous page. The main content area has a search bar and a 'Filter' button. Below is a table with columns: Document, Requisition, Created on, Description, Status, Contract, and Total price. The table lists several orders, all with a status of 'ordered at supplier'.

Document	Requisition	Created on	Description	Status	Contract	Total price
4700087026	ANF00003316	26/02/2020 15:55	Methusalem Senior	ordered at supplier	Takara Bio Europe... Takara Bio Europe S.A.S. (Cat)	540.90 CHF
4700087025	ANF00003315	26/02/2020 15:55	Methusalem Senior	ordered at supplier	Takara Bio Europe... Takara Bio Europe S.A.S. (Cat)	1,365.30 CHF
4700087024	ANF00003314	26/02/2020 15:54	Methusalem Senior	ordered at supplier	Takara Bio Europe... Takara Bio Europe S.A.S. (Cat)	366.30 CHF
4700087023	ANF00003313	26/02/2020 12:14	Methusalem Senior	ordered at supplier	Illumina Switzerl... Illumina Switzerland GmbH (Cat)	1,073.00 \$
4700087022	ANF00003312	26/02/2020 12:13	Methusalem Senior	ordered at supplier	Illumina Switzerl... Illumina Switzerland GmbH (Cat)	1,073.00 \$
4700087021	ANF00003311	26/02/2020 12:11	Methusalem Senior	ordered at supplier	Illumina Switzerl... Illumina Switzerland GmbH (Cat)	1,073.00 \$
4700087020	ANF00003310	26/02/2020 12:10	Methusalem Senior	ordered at supplier	Illumina Switzerl... Illumina Switzerland GmbH (Cat)	1,073.00 \$
4700087019	ANF00003309	26/02/2020 12:09	Methusalem Senior	ordered at supplier	Illumina Switzerl... Illumina Switzerland GmbH (Cat)	1,073.00 \$



## 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).





Lobby / Catalogs

The screenshot shows a web interface for 'Catalogs'. At the top, there is an 'Info text' section. Below it, the 'Catalog groups' section is displayed. The groups are organized into four columns:

- UZH interne Shops \***
  - Lagerkatalog der Zentralen Informatik ZI (intern) - Catalog (Green icon)
  - Lagerkatalog von MuL (intern) - Catalog (Green icon)
- Büromaterialien / Bürotechnik**
  - Aktiv Trading - Catalog (Green icon)
  - Askmi 04 AG - Catalog (Green icon)
  - IBA AG / Office World (OCI) - OCI (Green icon)
  - IBA AG, Kernsortiment - Catalog (Green icon)
  - Lyreco Switzerland AG (Cat) - Catalog (Green icon)
- Beamerlampen**
  - Tratech GmbH - Beamerlampen.ch - Catalog (Green icon)
- Diverse Produkte**
  - Mercateo Test - OCI (Green icon)
- Bücher / Fachliteratur**
  - A. Stein'sche Buchhandlung GmbH (OCI) - OCI (Green icon)
  - Buchhandlung Schweitzer Fachinformationen oHG (OCI) - OCI (Green icon)
- Elektro / Elektronik**
  - Conrad Electronic AG (OCI)-Test - OCI (Green icon)
  - Distrelec (OCI) - OCI (Yellow icon)
  - Elektro-Material AG (OCI) - OCI (Green icon)
  - Farnell Testkatalog - OCI (Green icon)
  - RS Components GmbH (OCI) - OCI (Green icon)

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.

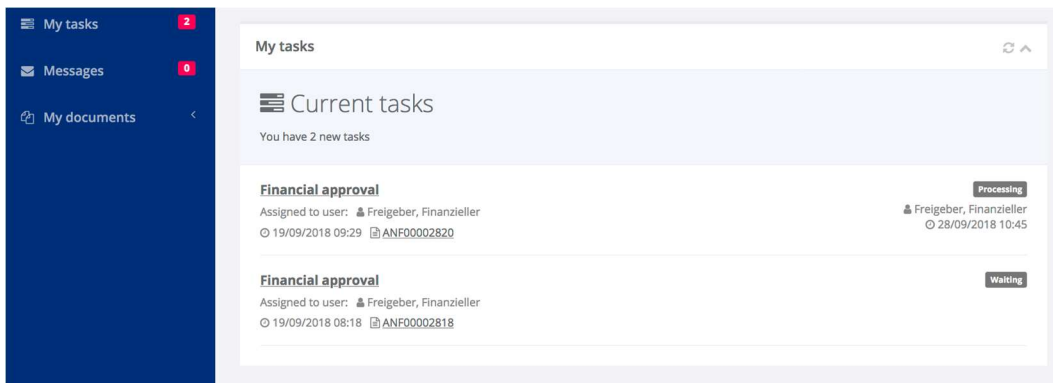
- Green icon  : Sustainability-Assessment fulfilled
- Yellow icon  : Sustainability assessment partially fulfilled, certificates may have expired
- Red icon  : Sustainability assessment not fulfilled, or forms not filled in correctly
- Gray icon  : Sustainability assessment pending, in progress

## 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.

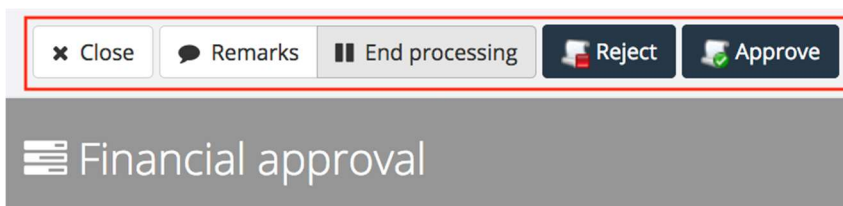
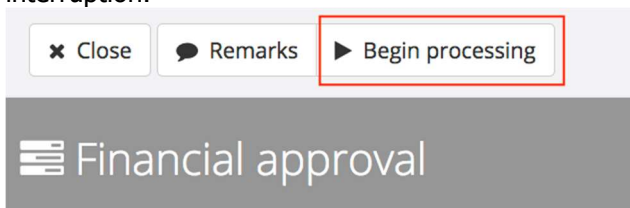


### 3.3.2 Editing the Task

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.

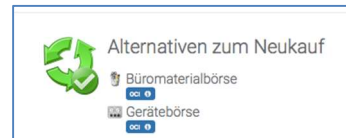
If the processing of the task is in progress, as in the case of the example, the tasks can be released with **authorization** and completed in this manner. If you reject a task/release, you must enter a remark (reason for rejection).

**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  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:

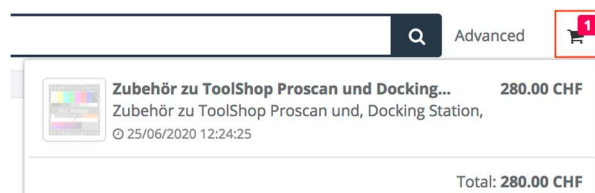
**Long description**

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](mailto:info@sustainability.uzh.ch).

### 3.4.2 Step 2: Open the shopping cart

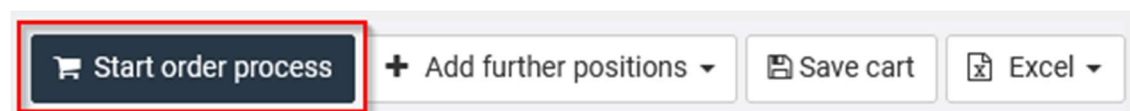
Open the shopping cart by clicking the shopping cart on the title bar.



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.

ANF00005469 Version: 0

Add document description

- There are 0 Attachment(s) available. [Add attachment](#)
- There are 0 Conditions available.

### Information about addresses

- The addresses on all positions have been automatically set by default. If you don't want to change these, you just can continue the process.
- For editing addresses on selected positions, select the positions at the beginning of a column and navigate to the [multiedit functions](#).

Select another delivery address Select another consignee

**1. HUBERLAB. Anti-Stressball ONEY** Shipping address Consignee

The delivery address must contain a location code so that the order can be forwarded.

Edit address

<p>Universitätsspital Zürich</p> <p>▲ Zentrum Chirurgie, Abt. Forschung Sternwartstrasse 14 8091 Zürich - Schweiz</p> <p>LAB E E 45</p> <p>267346</p> <p><input type="checkbox"/> Address used</p>	<p>Universitätsspital Zürich</p> <p>▲ Zentrum Chirurgie, Abt. Forschung Sternwartstrasse 14 8091 Zürich - Schweiz</p> <p>LAB E E 45</p> <p>267346</p> <p><input type="checkbox"/> Use address</p>	<p>Universität Zürich</p> <p>▲ Zentrum für Zahnmedizin Plattenstrasse 11 8032 Zürich - Schweiz</p> <p>LAB E E 45</p> <p>267940</p> <p><input checked="" type="checkbox"/> Use address</p>	<p>Universität Zürich</p> <p>▲ Institut für Rechtsmedizin Kurvenstrasse 31 8006 Zürich - Schweiz</p> <p>KUS E F 1</p> <p>348981</p> <p><input type="checkbox"/> Use address</p>	<p>Universität Zürich</p> <p>▲ Psychiatrische Universitätsklinik Langgstrasse 31 8032 Zürich - Schweiz</p> <p>BUR E G 205</p> <p>198544</p> <p><input type="checkbox"/> Use address</p>
<p>Universität Zürich</p> <p>▲ Geographisches Institut (GIUZ) Winterthurerstrasse 190 8057 Zürich - Schweiz</p> <p>Y25 E J 52</p> <p>217317</p> <p><input type="checkbox"/> Use address</p>	<p>Universität Zürich</p> <p>▲ Laboratory Animal Services Center August Forel Strasse 7 8008 Zürich - Schweiz</p> <p>FOS E U IVC-Anlage</p> <p>255738</p> <p><input type="checkbox"/> Use address</p>	<p>Universität Zürich</p> <p>▲ Anatomisches Institut Winterthurerstrasse 190 8057 Zürich - Schweiz</p> <p>Y43 E J 28</p> <p>172561</p> <p><input type="checkbox"/> Use address</p>	<p>Tierspital / Vetsuisse</p> <p>▲ Pferdeklinik Winterthurerstrasse 252 8057 Zürich-Irchel - Schweiz</p> <p>TDE E 00 13</p> <p>108518</p> <p><input type="checkbox"/> Use address</p>	<p>Universität Zürich</p> <p>▲ Institut für Hirnforschung Winterthurerstrasse 190 8057 Zürich - Schweiz</p> <p>Y55 E H 76</p> <p>108525</p> <p><input type="checkbox"/> Use address</p>

Save Close

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



### 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\*\*\*\*\*).

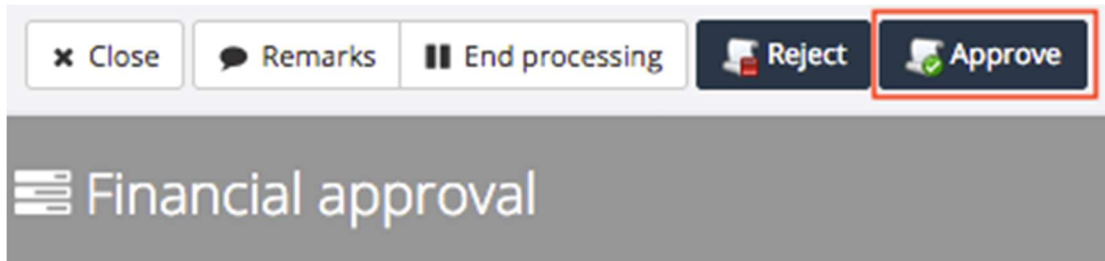
## 3.5 Approval Process

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.



### 3.5.1 Authorizing the Order Request

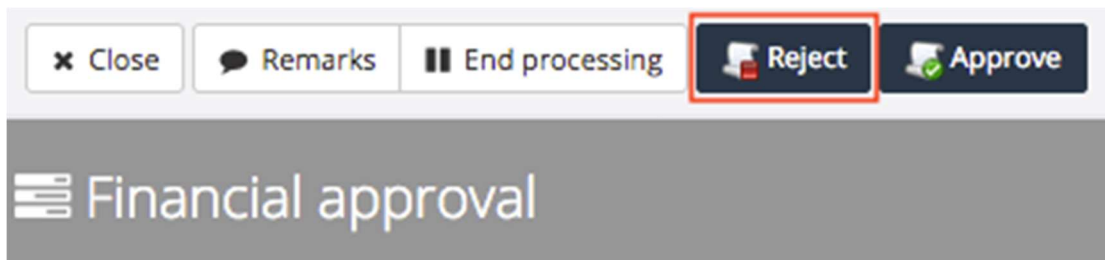
To authorize an order request with all items, click the "Approve" button. In this way, you can authorize all items with a single click.



### 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.)




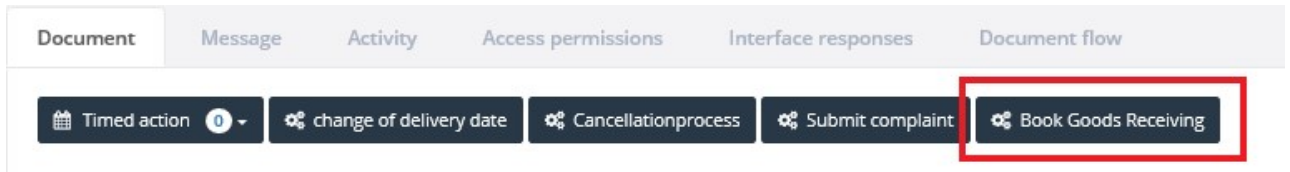
## 3.6 Goods Receiving Process (Expert-Process only!)

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:

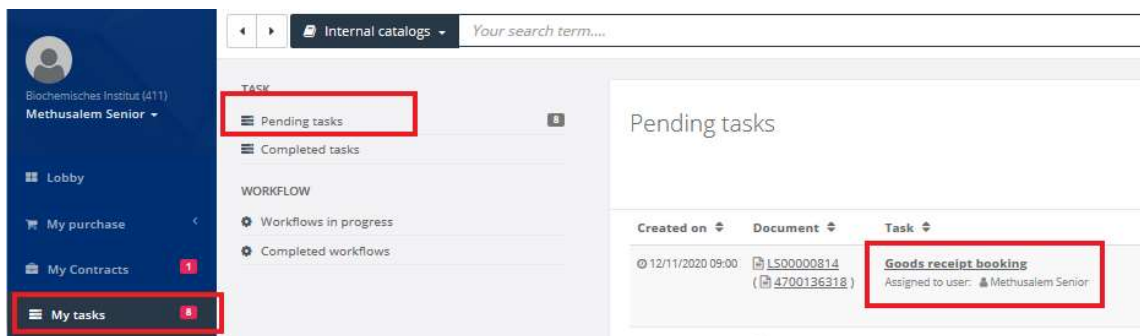
### 3.6.1 Step 1: Create a Goods Receiving Process

Through "My Documents > Orders", switch to the list of orders. Under the order for which you want to create a goods receiving process, click  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.

**4. Book**

5200006679 **4. Book**

There are 0 Attachment(s) available. [Add attachment](#)

Goods receipt for delivery note: [L500000791](#) ( [ID 4700136271](#) ) Contract: [ARP Schweiz AG](#)

Delivery note number:  **1. Delivery note number**

Goods receipt number: 5200006679

Booking date: 04/11/2020

Delivery note date: 04/11/2020

Short text:

**2. Save**

There are no positions in the goodsreceipt yet. Please either add individual items from the order below or accept all items.

**3. Booking all positions/quantities and finish it with one click**

Book all quantities and finalize

Add from order items:

<input type="checkbox"/>		1. OtterBox iPhone 11 Alpha Glass	Est. delivery date: 05/11/2020	Quantity ordered: 1 PCE Delivery note quantity: 1 PCE Quantities already booked: 0 PCE Quantity to book: 1 PCE
--------------------------	--	-----------------------------------	-----------------------------------	---

Book quantity ordered

### Partial delivery

A partial delivery must be completed as follows.

**4. Book**

5200006748 **4. Book**

Es sind 0 Anlage(n) vorhanden. [Anlage anhängen](#)

Wareneingang für Lieferschein: [L500000821](#) ( [ID 4700136331](#) ) Vertrag: [Digitec Galaxus AG \(OCI\)](#)

Lieferscheinnummer:  **1. Delivery note number**

Wareneingangsnummer: 5200006748

Buchungsdatum: 18.11.2020

Lieferscheindatum: 18.11.2020

Kurztext:

**2. Save**

Es sind noch keine Positionen in dem Wareneingang enthalten. Bitte fügen Sie entweder einzelne Positionen aus der unten aufgeführten Bestellung hinzu oder übernehmen sie alle Positionen.

Alle Mengen übernehmen und abschließen

Bestellpositionen auswählen:

<input type="checkbox"/>		1. OtterBox Alpha Glass (iPhone 11 Pro)	Voraus. Lieferdatum: 19.11.2020	Bestellte Menge: 10 PCE Lieferschein Menge: 10 PCE Bereits verbuchte Mengen: 5 PCE Zu buchende Menge: 5 PCE
--------------------------	--	---	------------------------------------	--

Bestellte Menge übernehmen

**3. Enter quantity**

**4. Save**



### 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.

