The Electronic Procurement System at MBI (EPO) User Information for Normal Orders

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1. Overview

The database application "Electronic Procurement Order" (in short: EPO) is used for the efficient compilation and processing of procurement orders (POs) at MBI. With a standardised web interface, requisitioners can set up or change POs, or use them as an original for new POs. You are provided with ideal support in this, as with your requirements profile the number of details required has been drastically reduced.

The employees in the administration department have considerably less work because inhouse redundancies are taken advantage of and there is no longer any need to copy the details in SAP.

These brief instructions are intended for scientific working groups and "normal" order requisitioners. There are separate instructions for other user groups, for example for administrative offices or order requisitioners for stores.

With EPO a PO in paper form is created, which is signed by the individual responsible for the commitment funds centre. This is sent to the MBI administration department – if necessary together with the reasons for the award and offers.

The precondition for use is an account issued by the administration department or the administrative office. The requirements profile is filed here.

2. Access

The EPO can be accessed on the intranet via the URL http://www.db.mbi-berlin.de/budget/ba_login.php. The URL is also linked to the administration department via the in-house WWW page.

3. Login Screen

Login and PW are issued centrally.

4. Access Menu

Set up a PO Set up a PO with template, Change, delete, show a PO Overview Logout

Elektronischer Beschaffungsauftrag am MBI								
Bitte melden Sie sich an:								
	User							
	Passwort							
	login abbrechen							

MBI - elektronischer Beschaffungsauftrag

Bitte wählen Sie, was Sie tun wollen:

- → neuen Beschaffungsauftrag anlegen
- ightarrow neuen Beschaffungsauftrag unter Verwendung einer Vorlage eingeben
- ightarrow gespeicherten Beschaffungsauftrag ändern, löschen, anzeigen
- ightarrow Übersicht Beschaffungsaufträge

Logout löscht Ihre Anmeldung

4.1 Setting up a PO

4.1.1 Header Data

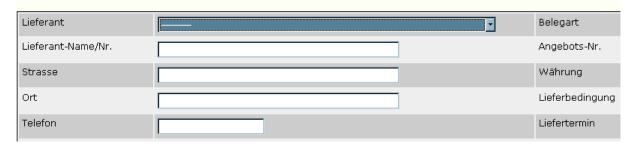
The PO consists of a header section which contains the supplier and general information on the consignment, as well as one or more order items.

4.1.1.1 Supplier

Eingabe Lieferant

Wird ein Lieferant aus der Liste ausgewählt, so ist kein Eintrag in den darunterliegenden Feldern zum Lieferanten erforderlich. Bitte hier den Anfangsbuchstaben für die Auswahl des gewünschten Lieferanten wählen:

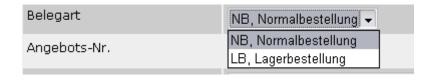
A|B|C|D|E|F|G|H|I|J|K|L|M|N|O|P|Q|R|S|T|U|V|W|X|Y|Z



The preselection is performed with a click on the first letters of the supplier, so that subsequently the supplier can be selected from the drop-down menu. The further details (address etc.) do not have to be entered, although they are not displayed until the data set has been stored. If – contrary to expectations – the suitable supplier cannot be found, the name and address have to be entered.

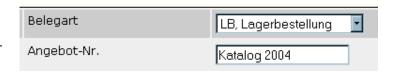
4.1.1.2 Check of Document Type

The standard cases "NO".



4.1.1.3 Offer Number

Obligatory entry according to the offer, catalogue designation etc.



4.1.1.4 Other Details

Details/changes as necessary

4.1.1.5 Conclusion: Storing Header Data

Conclusion of the entry of data for the purchase order header speichern, weiter zu Bestellpositionen

4.1.2 Order Items



If the order requisitioner has access to various types of finance (commitment funds centres), he or she first has to select the appropriate one. Only the commitment funds centres are shown which are allocated to the user.

4.1.3 Designation of the Consignment and Service

The entry here is obligatory.

4.1.4 Impersonal Account

Only the impersonal accounts are displayed which are allocated to the user via the user group. For all standard orders of the scientific departments the following profile has been set up¹:

The various impersonal accounts for general equipment, EDP devices (I+K) and software are

shown in the following table:

	Value Limits			
	Up to €50	€50-400	€400-5000	>€5000
General equipment	415 000	412 000	11 000	11 100
EDP devices (I+K)	415 600	412 600	11 600	11100
Software	412 800		34 000	34 100

In addition, there are impersonal accounts for consumable materials (403 000) and services (476 550). The designation LVA stands for "low value assets".

4.1.5 Quantity and Quantity Unit

Here the order quantity and quantity unit have to be selected.

4.1.6 Price/QU and Discount

The price per quantity unit is obligatory (so that the total price can be calculated), whereas the statement of the discount is optional for the requisitioner and is checked by the administration department.

¹ This is calculated from the in-house account-assignment rule and from the signature arrangements for procurements.

Complete the entries and set up any further orders. Either there are further order items to be added,

Beschaffungsauftrag - Auswahl der zu bearbeitenden Bestellposition Lieferant Anforderungsdatum Angebot-Nr. Bedarfs-Nr. Status Neutenkötter (u.a.), Britta Inmac Warehouse (Deutschland) GmbH 07.09.2004 11:14:00 Katalog 04 52171 gespeichert Auswahl Position und Mausklick auf 🖊 für bearbeiten, 🛈 für löschen oder 🖺 für kopieren. Menge VA ME VA Bezeichnung VA ArtikelNr VA Preis/ME V/ CD_ROM 10-er Pack (B) E520671 5 ST 5,80€ 🂋 🗻 🖺 DVD-RAM 10-er Pack (B) 676123875 4 10,56€ / 🕅 🖺 🛅 neue Bestellposition hinzufüger

or the overview functions are selected:

gesamten BA anzeigen | Auswahl BA
Zurück zur Startseite | Logout löscht Ihre Anmeldung

4.2 Checking the Order

The function "display the entire PO" creates a print-like view.

4.3 Setting the Status

The "stored" status stores the data for the PO, although the user would not yet like to release them for the next steps (for example processing by the administration department), for example because the details are not yet complete.



When the requisitioner has provided all the details, he or she sets the status "PO release". The entry field is contained in the form for the header data. If during entry of the order the status has not been appropriately set, this is changed by the function "change/delete stored order".

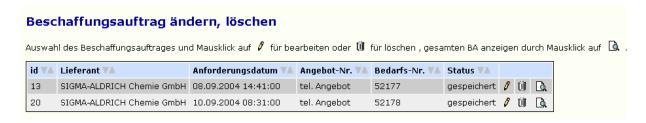
4.4 Setting up a PO with Template

If the ordering party has already stored an order, which he or she would like to use as a template for another order (e.g. because it is the same supplier), this is performed by means of a selection list.



With a click on the "Duplicate" symbol a new order with the same content is created. The menu then jumps to the header data and the order items, which can now be adapted.

4.5 Changing, Deleting a PO



The selection is performed by means of a click on the symbols.

5. Reporting System



With filters it is possible to selectively display procurement orders. For this it is necessary to click on the funnel in the headline and enter the criterion in the requirements field.