

# **The Electronic Procurement System at MBI (EPO)**

## **User Information for Normal Orders**

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Author: JK

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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 in-house 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](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.

### Elektronischer Beschaffungsauftrag am MBI

Bitte melden Sie sich an:

User	<input type="text"/>
Passwort	<input type="password"/>
<input type="button" value="login"/> <input type="button" value="abbrechen"/>	

## 4. Access Menu

Set up a PO

Set up a PO with template,

Change, delete, show a PO

Overview

Logout

### MBI - elektronischer Beschaffungsauftrag

Bitte wählen Sie, was Sie tun wollen:

- neuen Beschaffungsauftrag anlegen
- neuen Beschaffungsauftrag unter Verwendung einer Vorlage eingeben
- gespeicherten Beschaffungsauftrag ändern, löschen, anzeigen
- 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

Lieferant	<input type="text"/>	Belegart
Lieferant-Name/Nr.	<input type="text"/>	Angebots-Nr.
Strasse	<input type="text"/>	Währung
Ort	<input type="text"/>	Lieferbedingung
Telefon	<input type="text"/>	Liefertermin

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".

Belegart	NB, Normalbestellung
Angebots-Nr.	NB, Normalbestellung LB, Lagerbestellung

#### 4.1.1.3 Offer Number

Obligatory entry according to the offer, catalogue designation etc.

Belegart	LB, Lagerbestellung
Angebot-Nr.	Katalog 2004

#### 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
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### 4.1.2 Order Items

Position	1	Finanzstelle	205695, Handlager EDV	Fonds		Kontier.-Typ	K
Warengruppe		Mat.Nr		Bez.d.Lief. u.Leistung	CD_ROM 10-er Pack	KTR/Kst	105691
Pos.Type		Artikel-Nr	(B) E520671	Sachkonto	403000, Verbr.Hilfs-Betr.St.	FiPos	52201
Menge	5	ME	ST, Stück	Preis/ME	5.8	Rabatt(%)	0
<input type="button" value="ok"/> <input type="button" value="abbrechen"/>							

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 up<sup>1</sup>:

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	
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.







<sup>1</sup> 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

Anforderer	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.

Pos ▼▲	Bezeichnung ▼▲	ArtikelNr ▼▲	Menge ▼▲	ME ▼▲	Preis/ME ▼▲	
1	CD_ROM 10-er Pack	(B) E520671	5	ST	5,80€	  
2	DVD-RAM 10-er Pack	(B) 676123875	4	ST	10,56€	  

 neue Bestellposition hinzufügen

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.



Status	<div> gespeichert </div> <div> gespeichert  Budget überschritten  Freigabe BA </div>
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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.

### Beschaffungsauftrag mit Vorlage




Die Auswahl der Vorlage erfolgt durch Mausklick auf  , gesamten BA anzeigen durch Mausklick auf  .

id ▼▲	Lieferant ▼▲	Anforderungsdatum ▼▲	Angebot-Nr. ▼▲	Bedarfs-Nr. ▼▲	Status ▼▲	
13	SIGMA-ALDRICH Chemie GmbH	08.09.2004 14:41:00	tel. Angebot	52177	gespeichert	  

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

## Beschaffungsauftrag ändern, löschen


Auswahl des Beschaffungsauftrages und Mausklick auf  für bearbeiten oder  für löschen , gesamten BA anzeigen durch Mausklick auf .

id ▼▲	Lieferant ▼▲	Anforderungsdatum ▼▲	Angebot-Nr. ▼▲	Bedarfs-Nr. ▼▲	Status ▼▲	
13	SIGMA-ALDRICH Chemie GmbH	08.09.2004 14:41:00	tel. Angebot	52177	gespeichert	  
20	SIGMA-ALDRICH Chemie GmbH	10.09.2004 08:31:00	tel. Angebot	52178	gespeichert	  

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

## 5. Reporting System

### Übersicht Beschaffungsaufträge

Sie können nach allen Spalten filtern ausser 'Anforderungsdatum' und 'Wert'.  
Filter aktivieren durch Klick auf .

Bedarfs-Nr. ▼▲	Lieferant ▼▲	Anforderungsdat. ▼▲	Status ▼▲	Pos-Nr. ▼▲	Fist ▼▲	Wert ▼▲
52171	Inmac Warehouse (Deutschland) GmbH	07.09.2004 11:14:00	gespeichert	1	205695	29,00€
52171	Inmac Warehouse (Deutschland) GmbH	07.09.2004 11:14:00	gespeichert	2	205695	42,24€

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.