DREW & ROGERS PUNCH OUT CATALOG FOR STATIONERY PRODUCTS

Effective Sep 5, 2018, Drew & Rogers (Supplier ID: V000001614) has now been created as a punch-out catalog in PeopleSoft for printing services (business cards, letterhead, note pads, envelopes, and buck slips) products. All requisitions for Drew & Rogers must now be entered through the punch-out process (i.e. W.B. Mason, Grainger, Dell Marketing, MRA, Fisher Scientific, and HD Supply), using University Contracts (UNC#) as the purchasing methodology, contract number 1340.

To create a Drew & Rogers Punch-Out Requisition:

**NOTE** – Punch Out requests cannot be edited or canceled once submitted in the system. For customer support, contact Stella Corodemus-Lukas, via e-mail at stella@drew-rogers.com.

Internet Explorer is not compatible with this process. Please use Chrome or Firefox.

1. In PeopleSoft, go to Main Menu > eProcurement > Requisition and select Drew & Rogers in the Web section of the Create Requisition screen.

The Drew & Rogers screen displays the Home page with the current items available showing.

2. Select the thumbnail from the screen that represents the available product type to purchase.
The product category items display.

3. Select the **View Product** button for the targeted item.

Depending on the type of product (business cards, letterhead, note pads, envelopes, and one of the buck slips) being purchased, additional information may be needed.

4. Press **Next Step** once the form has been completed.

5. Review the displayed proof and select **Yes** beside ‘**I approve this proof**’ to confirm the information is correct.
6. If needed, change the quantity of the amount of product, edit the proof or click the **Add to Cart** button to proceed with the order.

7. A screen displays the product(s) successfully added to your cart. Select **Continue shopping** or **Proceed to checkout**.

8. On the **Shopping-Cart Summary** screen, line items can be edited or removed and the shopping cart can be updated. Click the **Submit Purchase Order** button to load this request into the PeopleSoft requisition form.
9. The system message displays indicating that a budget check must be performed on all requests. Click the OK button to proceed.

10. In the Requisition Name field, enter a unique description of the purchase (items or reason).
11. Click the drop down arrow in the Purchasing Methodology field and select University Contracts (UNC#).
12. Enter 1340 in the Contract/Waiver # field.

For each line item, you will need to indicate the Ship To and Accounting codes for the goods ordered.

13. Click the Show Ship To and Accounting button (the right pointing arrow to the far left of your line item) on your order line.
14. In the display, click the **Ship To Look Up** button (magnifying glass) and select the appropriate ship to location. Note: MSU01 is the default location corresponding to 1 Normal Avenue.

15. The “Attention To” field is required to be completed to include the Requestor’s Name/Building Code and Room Number/Extension. An example of this information is: **Sue Johnson/UNIV5100/1234**. Please note, there is a 30 space limit within the “Attention To”, which includes the slashes and spaces as well as characters. If this information is not completed within the requisition line, the request cannot be saved and processed within PeopleSoft.

16. Office supplies orders are next day delivery. For all other punch out catalog orders, indicate a due date.

17. Click the **Expand Section** button in the Accounting Lines section of the screen.

18. Click the **Chartfields2** tab.

The Accounting information will be pre-populated based on the CWID entered at sign in. Typically, these fields will not need to be changed unless you are ordering for your non-primary business area.

19. If you need to change any of the Chartfield codes, click the **Look Up** button (magnifying glass) of the corresponding field and search for your code.

In a punch out requisition, the Account field is populated based on the items you are purchasing, so you do not need to change the defaulted Account code(s).

Purchase requisitions cannot be submitted without a budget check performed.
20. Click **Save for Later** to store your purchase requisition information while you perform budget checking.

21. Click the **Check Budget** link. If your Budget Check produces an Error code instead of a Valid status, review your budget report to confirm there is enough money in the account and check the chartfield string to ensure the correct Fund, Department, Account combination are used before contacting the Budget Department.

22. Once a Valid status displays for your budget check, you can click the **Save & submit** button to submit the purchase requisition for approval.

The Purchase Requisition Confirmation screen will display with the purchase requisition name and number listed and the approval flow for the request.