Proactis Press-work

order process

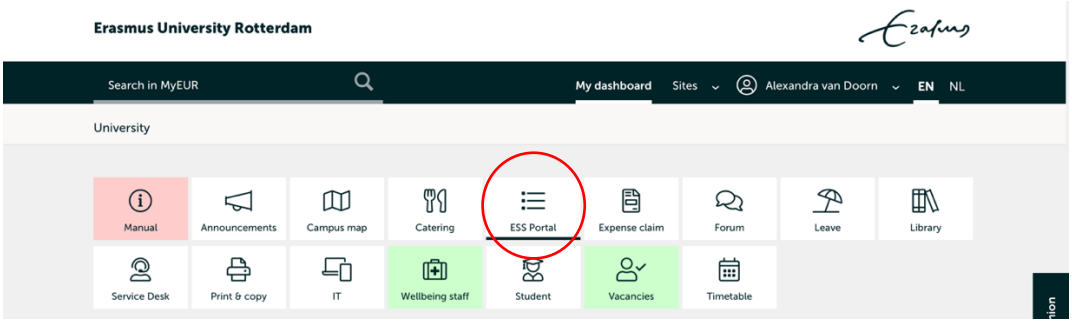
Version 1.0 24.03.2021

Erasmus University Rotterdam
Making Minds Matter

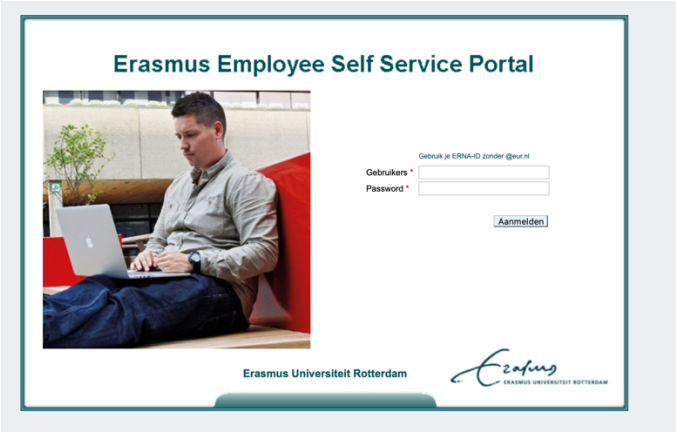
Ordering and placing a print order in Proactis.

Important: you must be logged into Proactis as an orderer to gain access.
Are you not yet registered as an orderer in Proactis?
Then you can request access by contacting the financial controller of your department or faculty.
You can only be an orderer if you are **not a budget holder**.

Step: 1 – Go to my.eur.nl and select the ESS Portal
Please note that the ESS Portal can only be accessed if you are connected to the campus network.
Working from home? Then you can access the ESS Portal via the Remote Desktop/MyApps
or via an EduVPN connection.



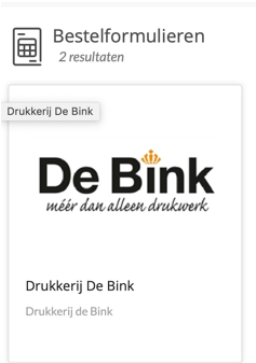
Step: 2 – Log in using your ERNA-ID to gain access to the ESS Portal



Step: 3 – In the ESS Portal, select: 'My invoices and orders'

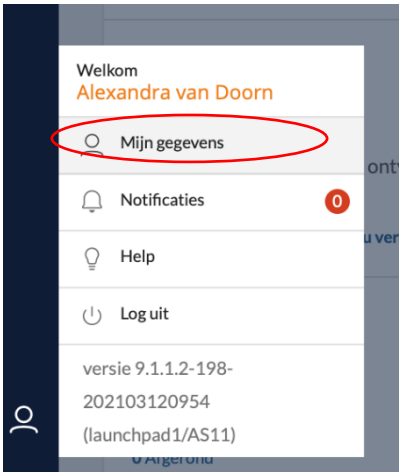
Step: 4 – If you are authorised to place orders in Proactis, you will now be automatically directed to Proactis.

- Are you receiving an error message? → then you are not authorised to place orders → contact your financial controller/faculty.
- If you have an active account but are not authorised to order printed materials, you will not see an order tile of OBT De Bink in Proactis. → is this the case?
  Contact the financial controller of your department/faculty.

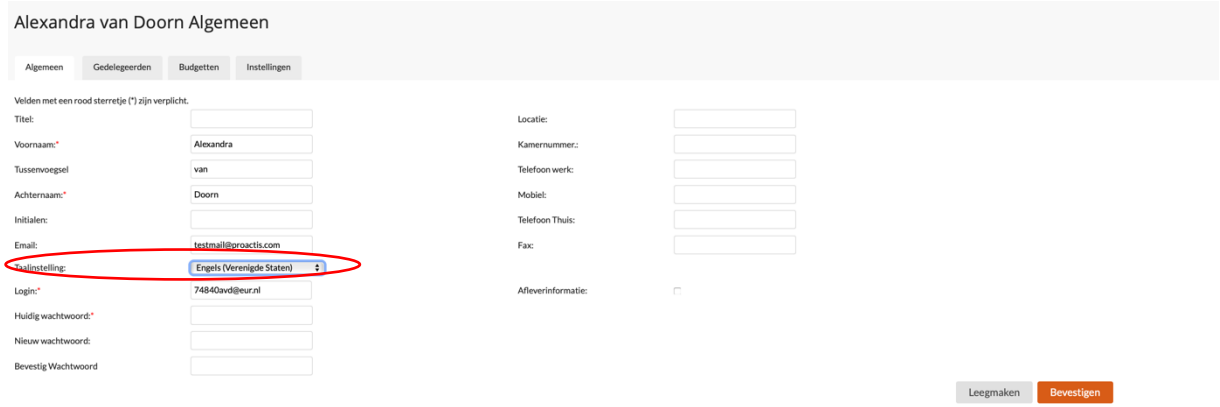


The language in Proactis can be changed as follows:
Click on the figure icon at the bottom left.

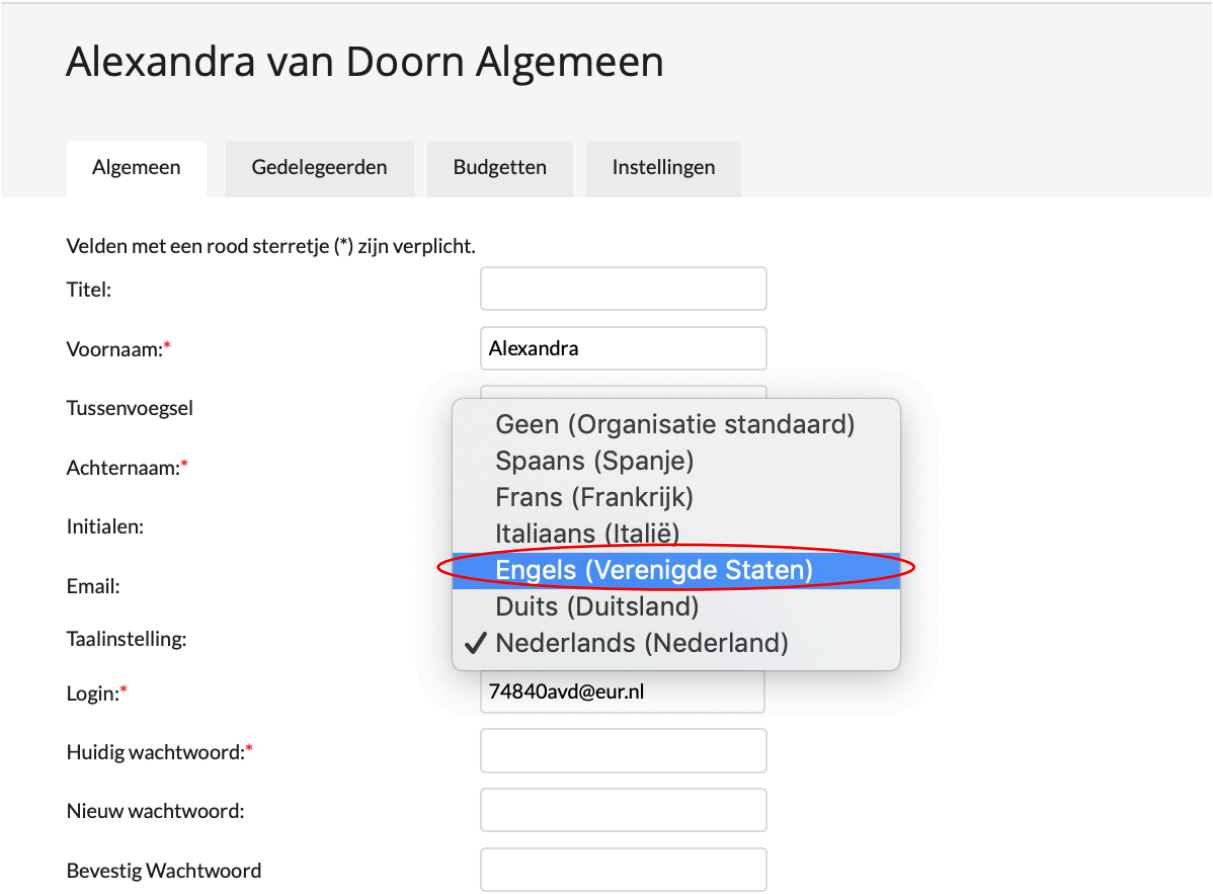
Click on: 'my data'



Click on ‘language setting’

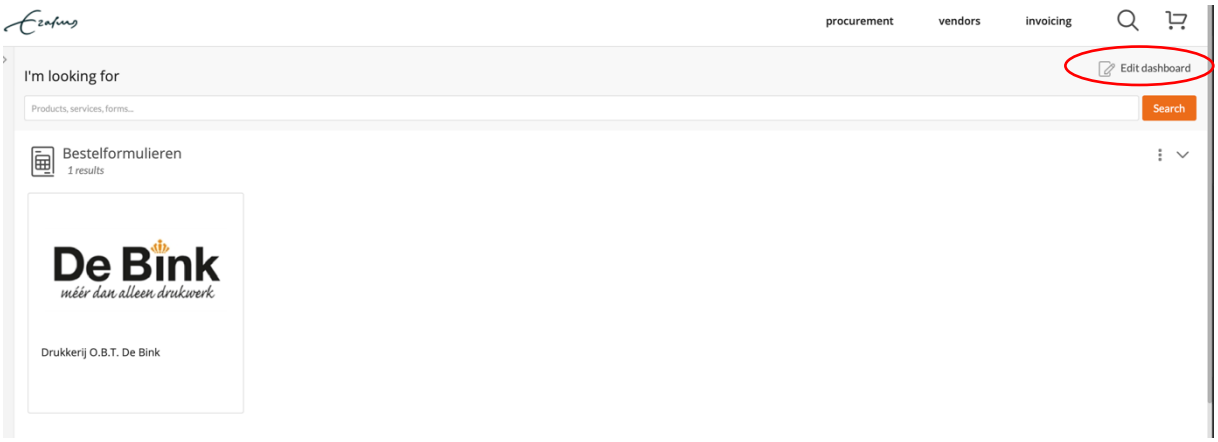


Select ‘English’ and then click on the orange ‘confirm’ button at the bottom right to close the screen.

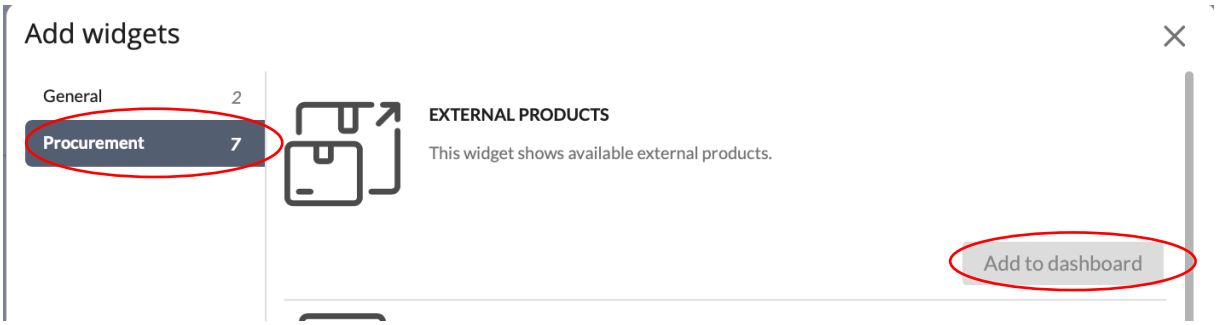


Step: 5 – Are you logging in for the first time?
First, add the **'order forms'** widget to your dashboard.
This also applies if you are already using Proactis (e.g. to order from Lyreco) but are ordering printed materials for the first time.

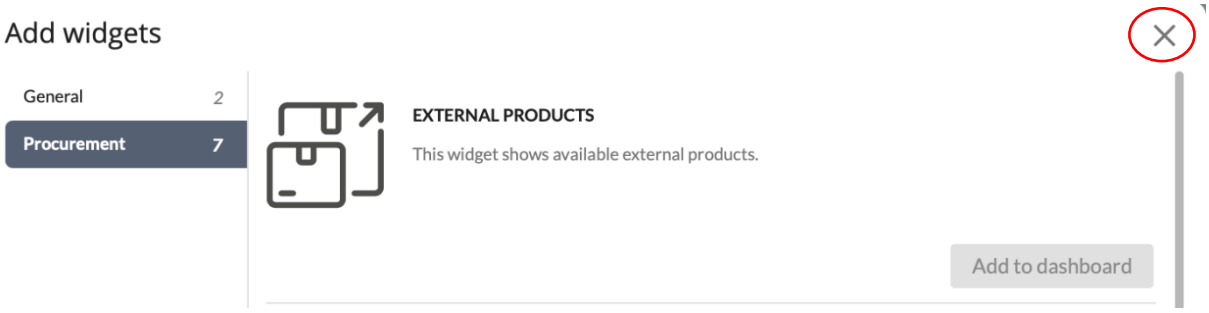
Step: 6 – Click on 'Edit Dashboard' at the top right.



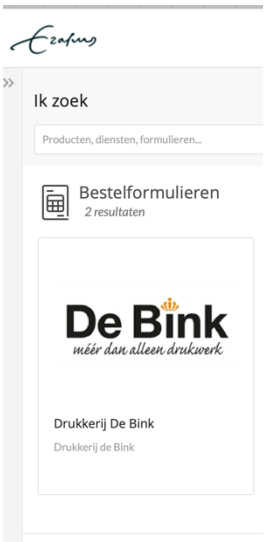
Step: 7 – In the pop-up screen, select 'Add widgets' and in this open menu select 'Procurement' → at the right below 'ORDER FORMS', click on 'Add to dashboard'



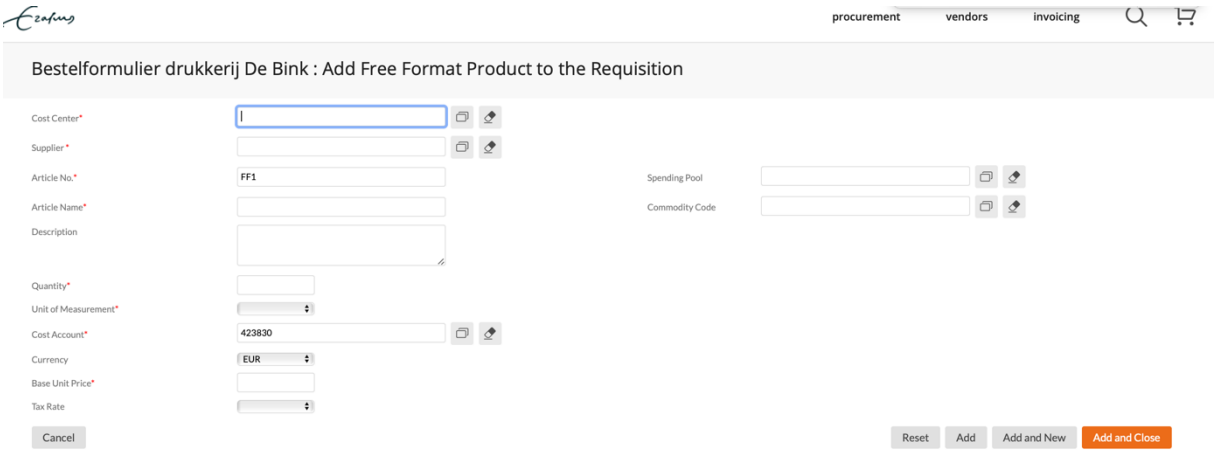
The order form for O.B.T De Bink has now been added to the dashboard.
The 'Add widgets' screen can be closed.



Step: 8 – Select ‘print order form’ to order a printed product.

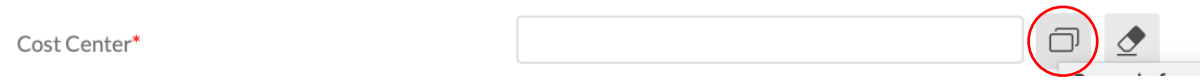


You will be shown the order form, which looks as follows:

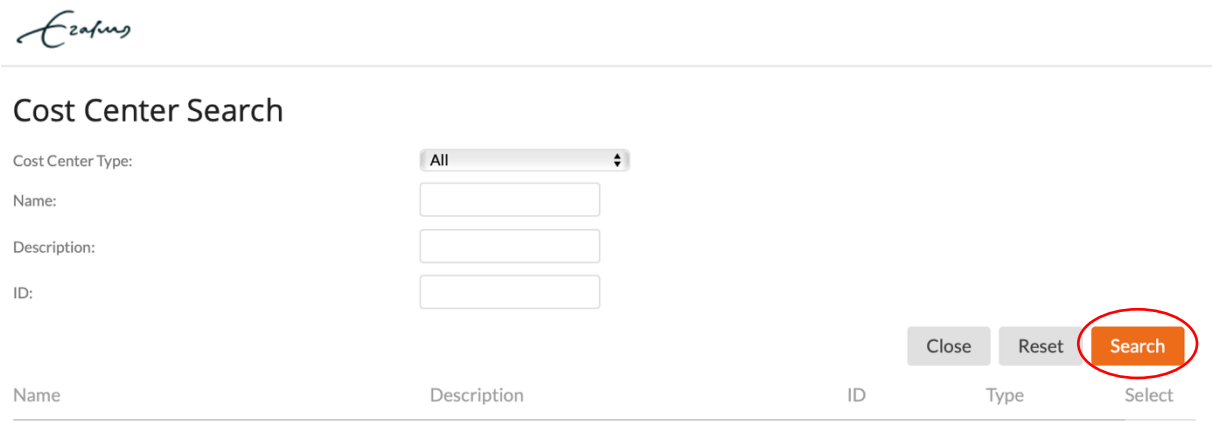


The next step explains per field what you need to fill in to place an order.

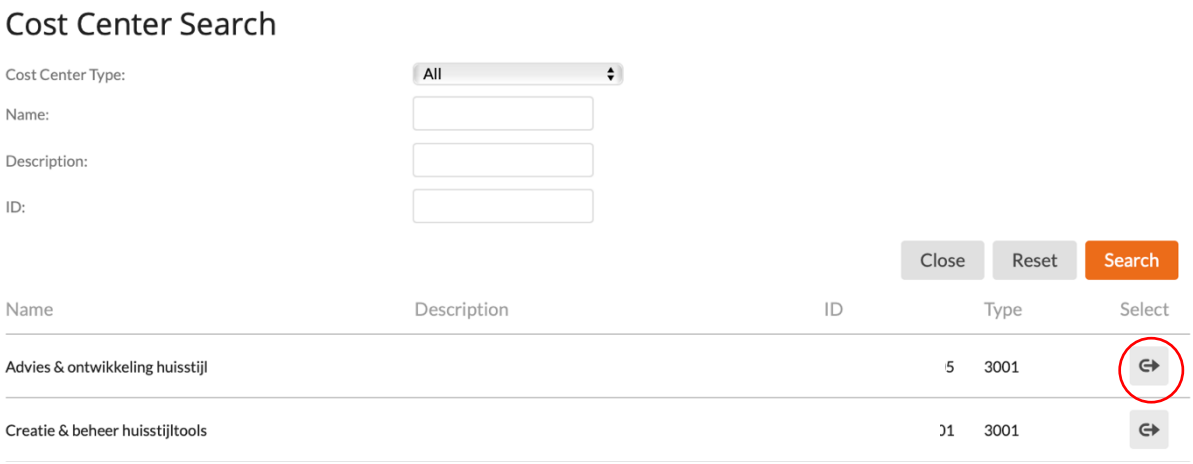
Step: 9 – Explanation of input fields
Cost centre input field: click on the 'two squares'.



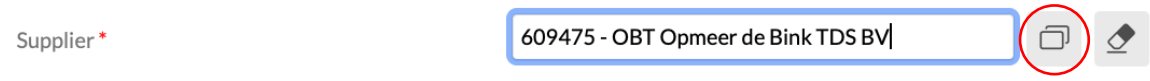
The next screen will open. Clicking on '**search**' will open a list of budget numbers (cost centres) for which you are authorised to order printed material. If this list is very long, it is better to enter a search criterion; for instance, part of the budget number (ID) or name.



You can select the **cost centre** by clicking on the symbol below the word '**select**'.



Select OBT De Bink in the '**Supplier**' field.



Article number: enter the quote number stated on your offer.
You can find the quote number on the offer you received by e-mail from OBT De Bink.
The quote number is stated below the date.

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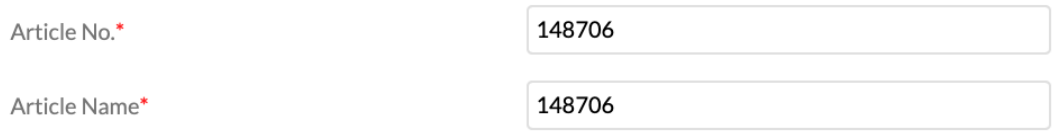
t.a.v. Mevrouw A. van Doorn
Postbus 1738
3000 DR ROTTERDAM

Leiden, 4 maart 2021
Offertenummer: 148706

OBT BV
Kerketuinenweg 8
Postbus 43508
2504 AM Den Haag

T 070 2800 850
E info@obt.eu
www.obt.eu

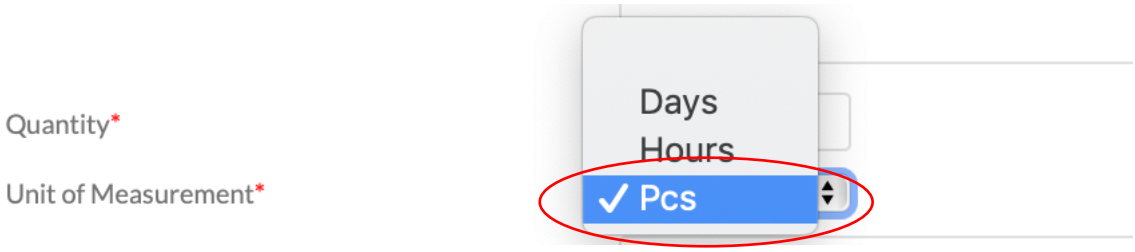
Article name: this is shown as: FF1. You can remove this and enter the quote number again. The article number and article name fields are therefore identical.



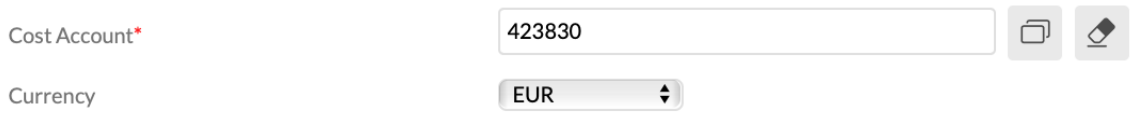
Description: this field is not mandatory.

Quantity: always enter the number 1 here. Your order specification is stated in the quote.

Unit of measurement: always enter **'pieces'** (Pcs).



Cost account: in principle, this is automatically set to **'423830 – Reproduction costs'**.
This can be changed if necessary. You can change the cost item by clicking on the 'two squares' on the right-hand side.



This shows cost accounts used by finance for the whole university.

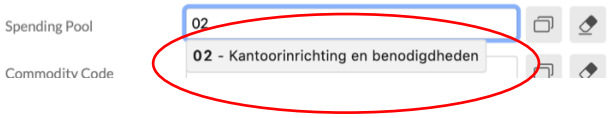
Currency: this is set to EURO by default. You can leave this the way it is.

Base unit price: here you enter the amount charged on the quote you received.
Enter the amount excluding VAT.
Suppose the amount is 500 euros and 25 cents, then you enter the following in the base unit price field:
500.25. Use a decimal point rather than a comma.

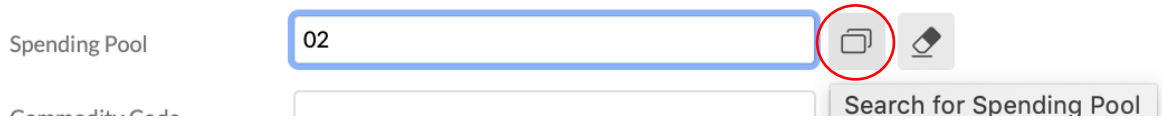
VAT percentage: the correct VAT percentage is pre-entered.
'V7 – procurement VAT 21% percentage'

Spending Pool: '02 - Office equipment and supplies' should be selected here.
This can be done in two ways.

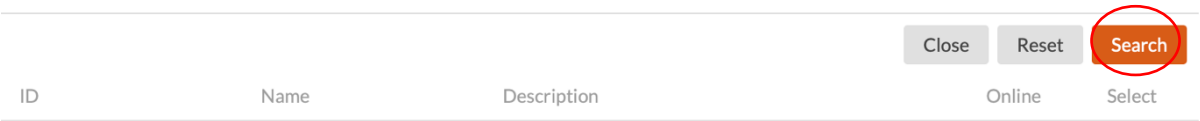
Option: 1 by placing the cursor in the field and typing '02'.



Option: 2 by selecting the 'two squares' symbol on the right.



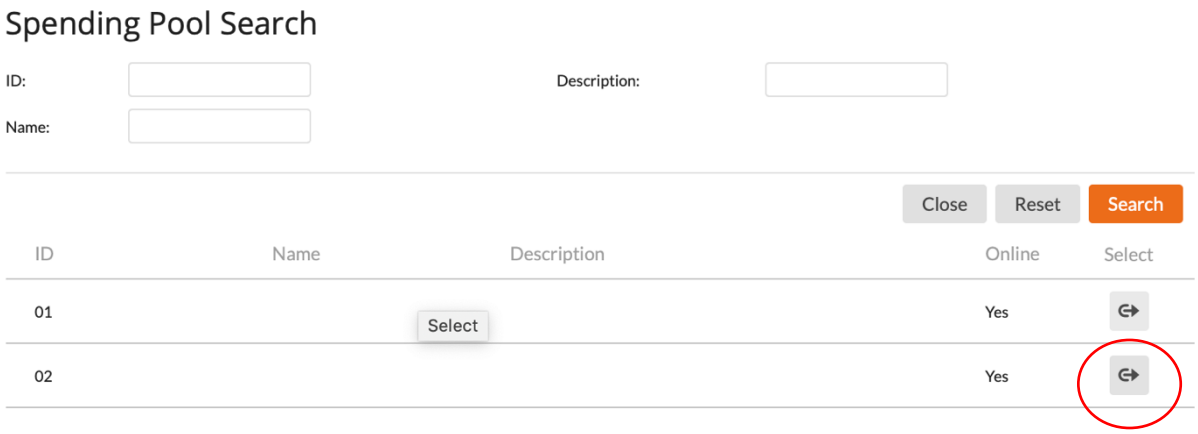
The following screen will open:



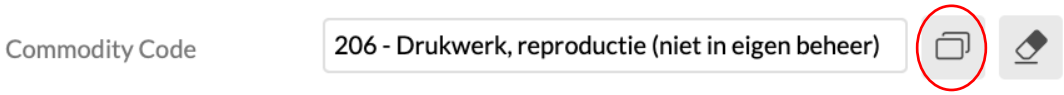
select 'search'

Select the cost item: '02 office equipment and supplies' and click on the symbol shown below the word 'select'.

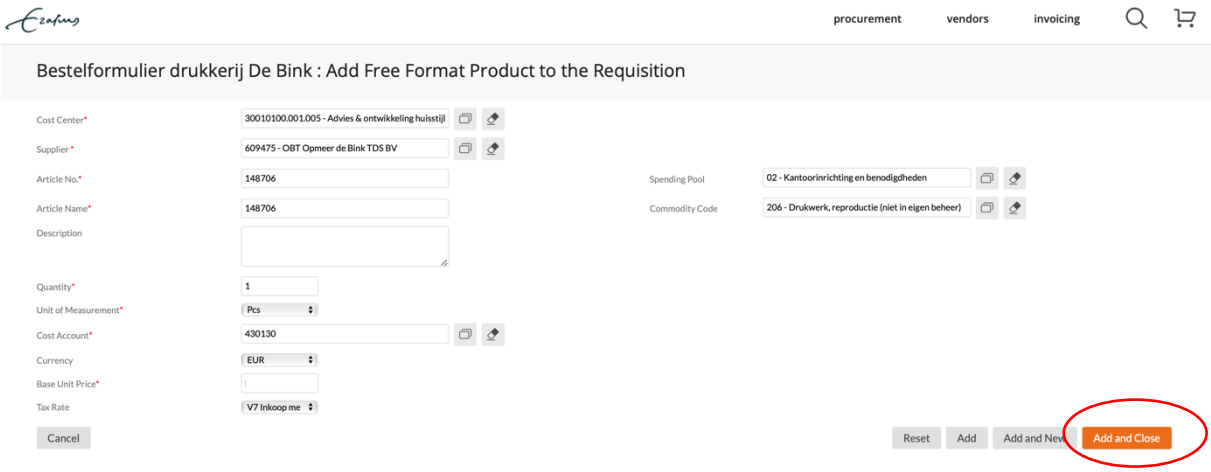
Commodity Code: this should say '206 - Printing, reproduction (not in-house)'.
This value can be inserted either by typing 206 or by selecting the 'Commodity



Code' in the same way as described for the 'spending pool' field (the step above)

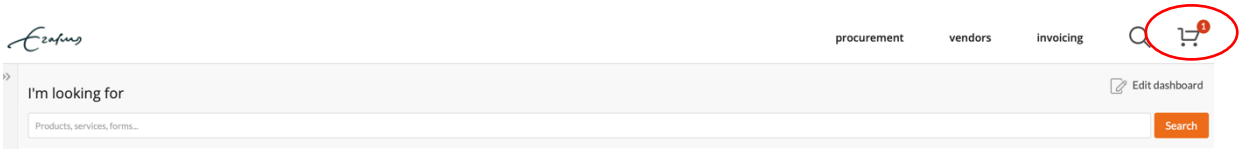


The completed screen will then look like this:

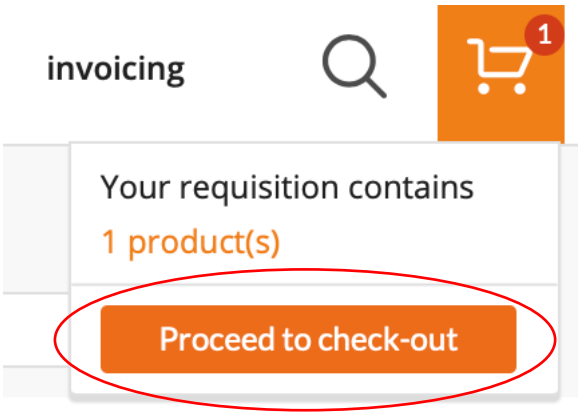


Click on: 'add and close'

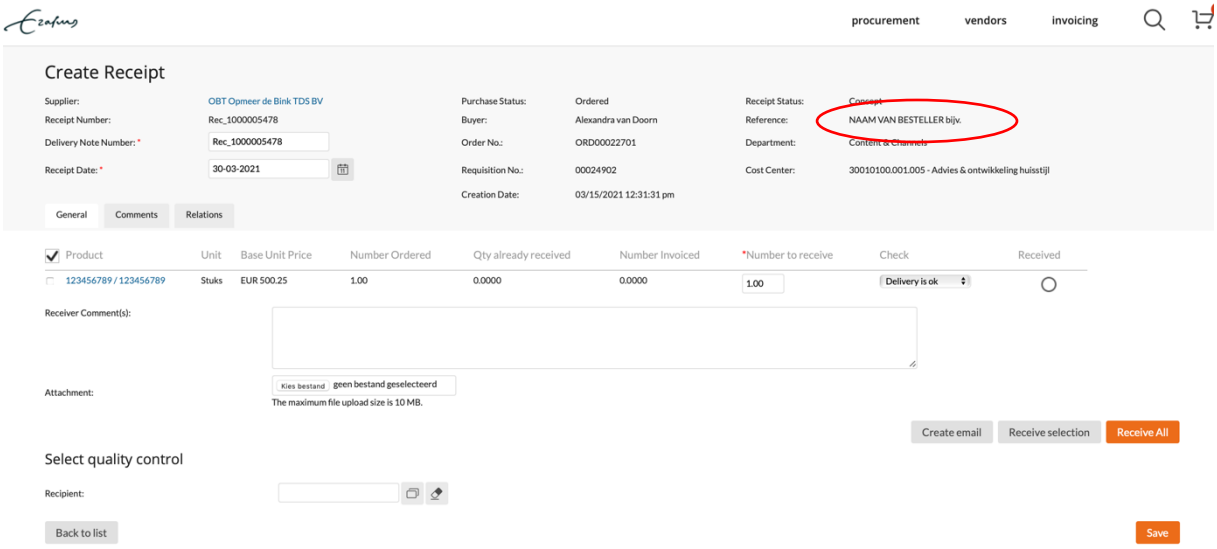
Step: 10 – you have returned to your dashboard. You will see a 1 appearing at the top right and your product is ready in your shopping cart.



Step: 11 – select the **'shopping cart'**.
The following will be displayed and you should click on **'Proceed to check-out'**.

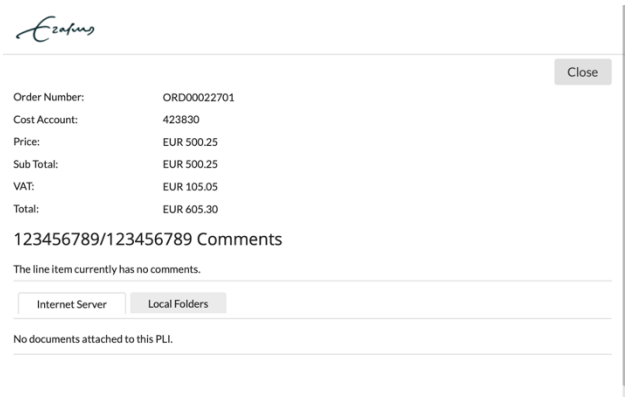


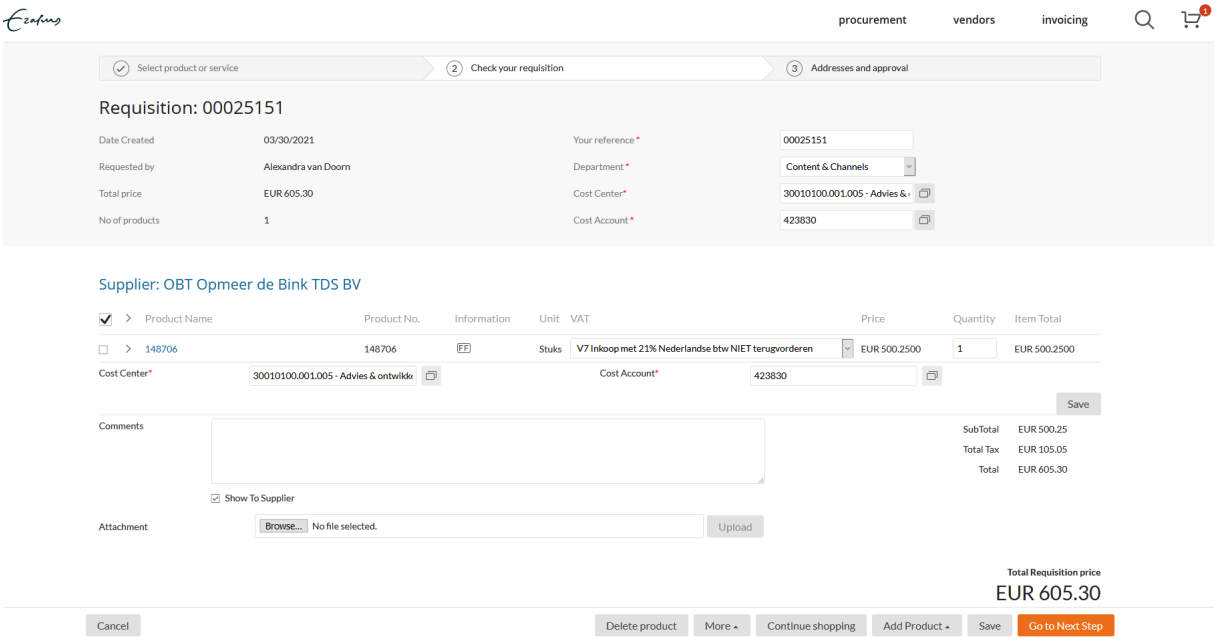
Step: 12 – an overview of your order will be shown.
Check your order.



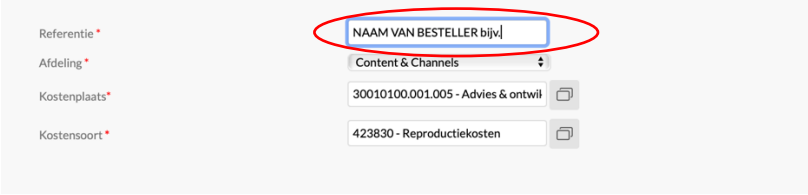
If you want to check whether the VAT percentage is correct, click on the blue order number you see under **'product'** on the left.

The following screen will open and show the tax under 'VAT'.
The standard VAT rate for printed materials is 21%, and in this example you can see that this is included.





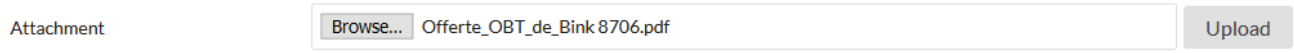
The order number is duplicated under **'reference'**.
You can leave this as it is or you can, for instance, enter the name of the person for whom the order is or the name of the project. This may be helpful if you are looking for a certain order later but cannot remember the order number. Then you can search by reference.



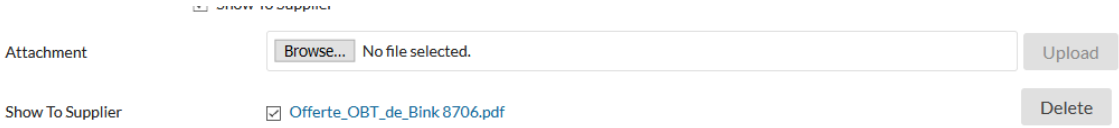
Does it look different in your case than ?

In the field: **'attachment'**, upload the quote you received from O.B.T. De Bink.

Under Browse, select the quote you received from O.B.T. De Bink.



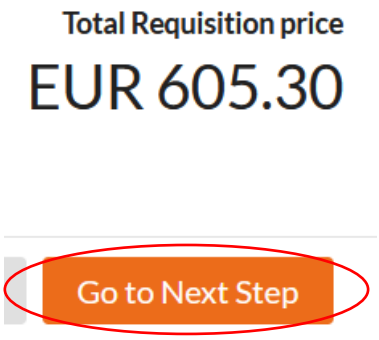
Then click on **'upload'**



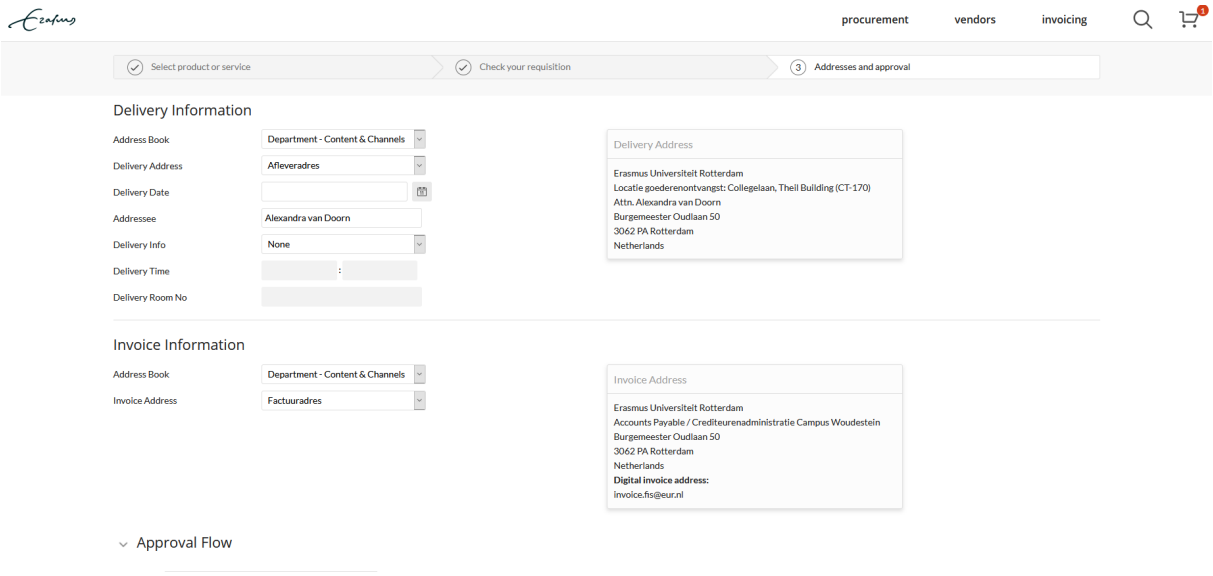
If your quote was successfully added, you will see an extra bar appear under the attachment: **'show to supplier'** → this is the quote you have added to your print order.
NOTE: this box is ticked by default and indicates that the quote will be sent to O.B.T. De Bink together with the order. It is therefore important to leave the box ticked.

Step 13 – completing the order
Have you checked everything carefully? (Make sure the **total amount** you see now **corresponds exactly to the quote** you have uploaded).

Click on **'Go to next step'** at the bottom right.



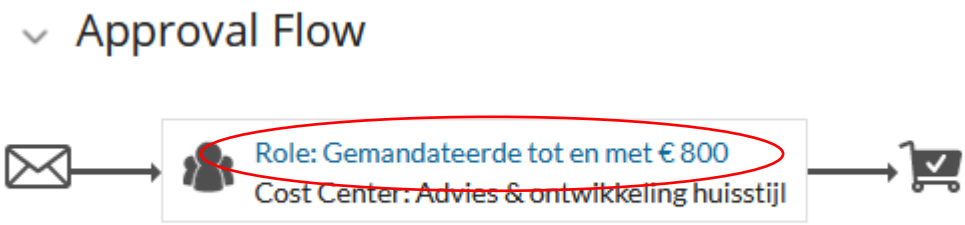
Step: 14 – Checking the address details
Proactis automatically enters the address details known from the university
(these are the address details linked to your department; for most departments this is Burgemeester Oudlaan; for the departments of ISS it is Kortenaerkade, The Hague)



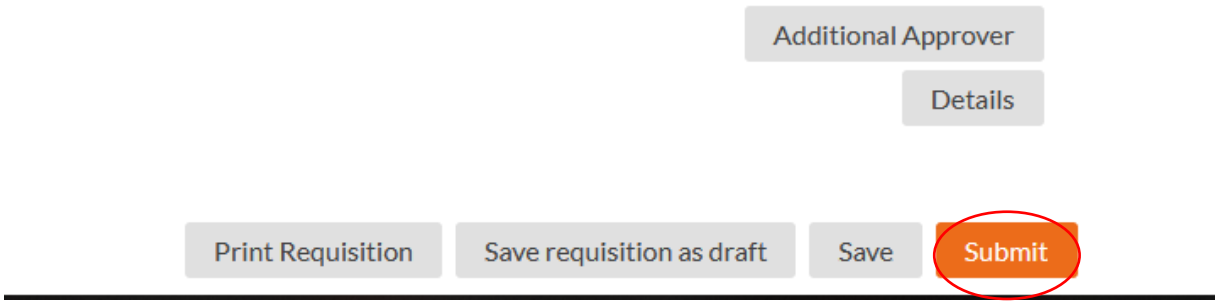
At **delivery date:** select the date agreed with OBT De Bink.

Step: 15 – if you did not yet know who the budget holder is who should approve your order, you can see this by clicking on the arrow to the left of **'approval flow'**.

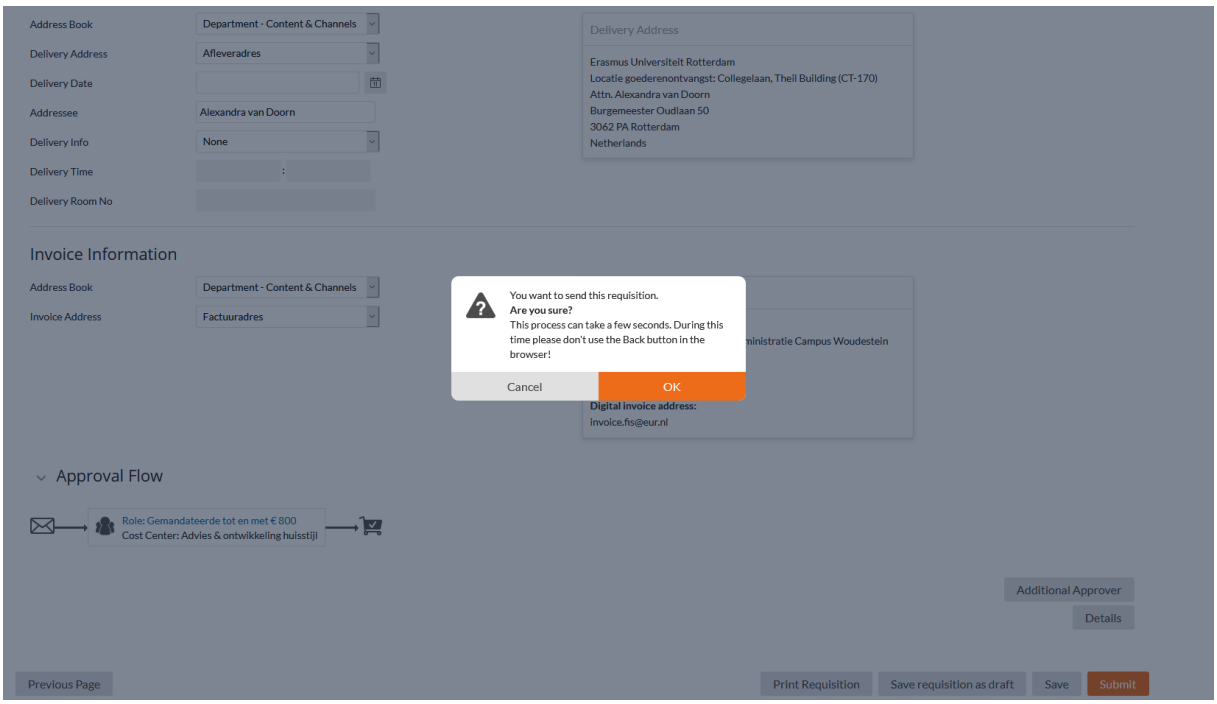
Then click on role: **'mandated up to …'**; after this, you can see here who the budget holder of this cost centre is for your department.



To transfer the order to the budget holder, press **'Submit'** at the bottom right.



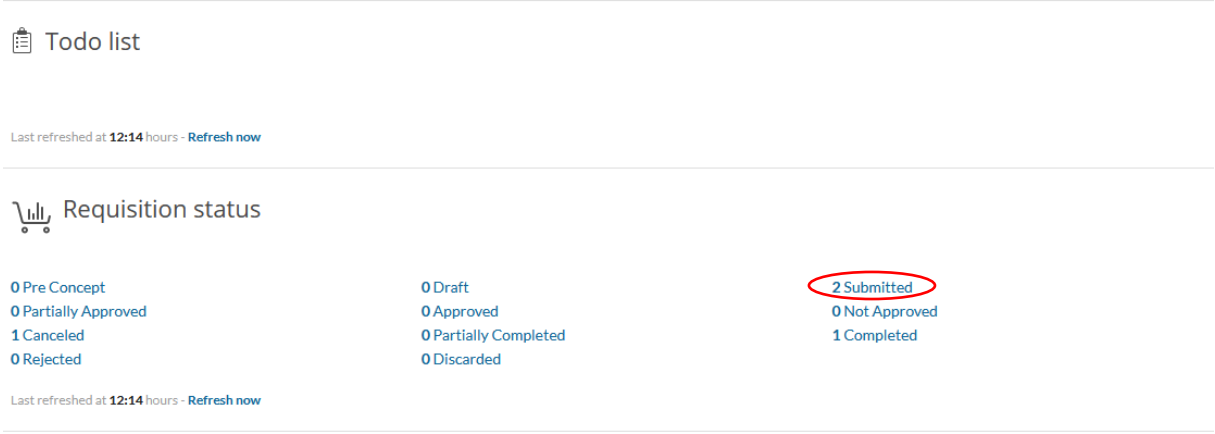
After this screen, the next screen will open, on which you click on **'OK'**:



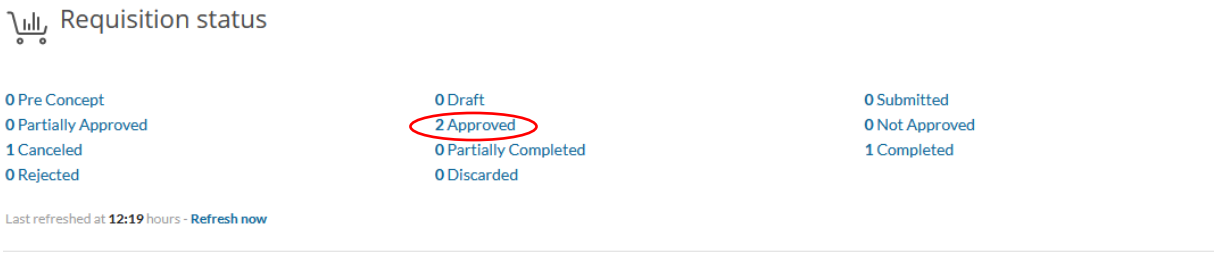
<u>NOTE: Your order has now been transferred to the budget holder. The budget holder must approve the order and only then will your order be placed at OBT De Bink!</u>

You can check whether your order has been approved in the dashboard under **'order status'**.

As long as your order status says **'submitted'**, the order has <u>not yet</u> been approved.



Step: 16 – order has been approved
Your order has been **approved** if it appears as approved under **'order status'**.



Upon <u>approval by the budget holder</u>, a purchase order is **placed** and you as the **orderer** as well as **OBT De Bink** will receive a purchase order by e-mail.

The orderer receives a message in the mailbox that the order with number = xxxxx has been approved and converted into a purchase order with number ORDxxxxx
The relevant purchase order (pdf document), which has been sent to De Bink, is not included in this mail but can be looked up by the Orderer in the list of Orders/Purchase Orders under 'Approved'.

So to clarify:
As long as the orderer is still working on the order and it has not been approved yet,
we refer to it as an Order.
Once an order has been approved, a Purchase Order has been created, and we therefore refer to an Order **AND** a Purchase Order (Order numbers consist of digits only and Purchase Order numbers always start with ORD)

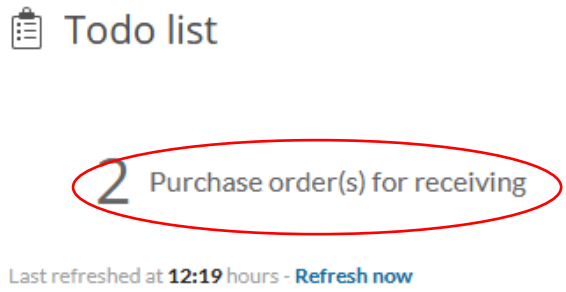
Your order/purchase order will be processed!
Now you have to wait for your print order to arrive.

The last step, step 17, is only carried out once **the printed material has been received in good order!**

THE ORDERING PROCESS IS NOT YET COMPLETE!

Step: 17 –
The total cycle of ordering and invoicing is not complete yet.
As soon as you have physically received the print order, you can complete the todo list in your Proactis account.

'todo list' → click on the down arrow to expand the menu. →
the message: '1 purchase order for receiving.'

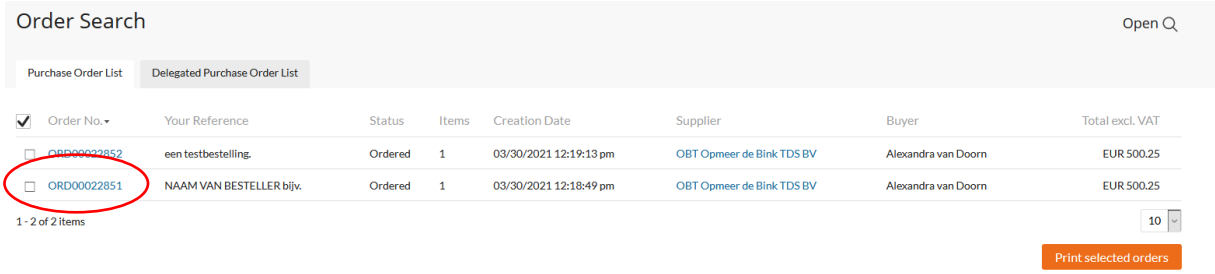


In order for OBT De Bink to be paid, you need to complete 'the todo list'.

If De Bink has delivered the order and the delivery is complete and satisfactory, this order must be registered as received.

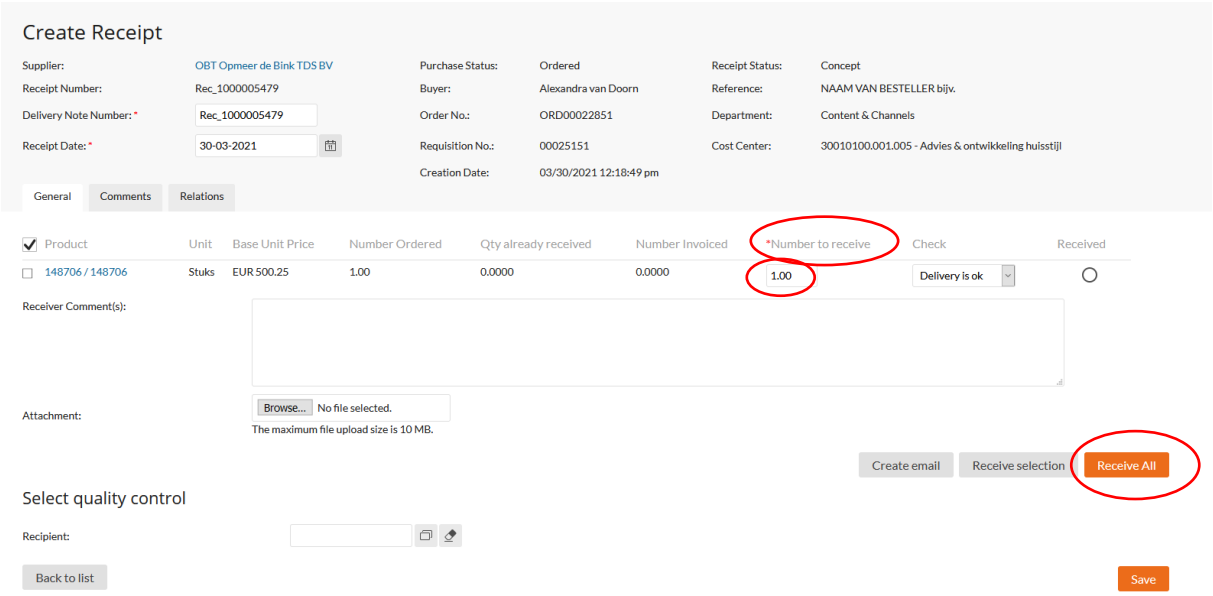
Under 'Purchase Order List', click on receipt registration

The following screen shows all the orders you have placed but the receipt of which has not yet been registered.



Look up the order of which you wish to register the receipt and click on the Order Number ORDxxxx.

The Create Receipt screen will be opened:

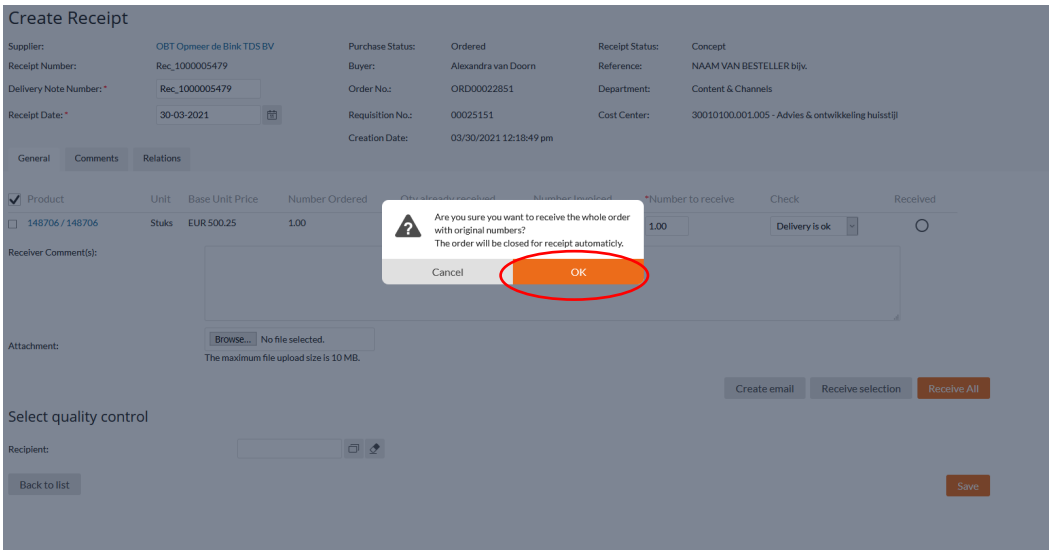


The details of your **Order** are displayed at the top of the screen.
You cannot change these details, but you can use it to verify that you have selected the intended order.

Details from the **Order Line** are shown in the **centre** of the screen.
Again, these details cannot be changed, except for the **'*Number to receive'**.
Proactis suggests that if you have ordered 1 Piece, you **register the receipt of 1 Piece**.

Do not change the 1.00 and click on [Receive All]

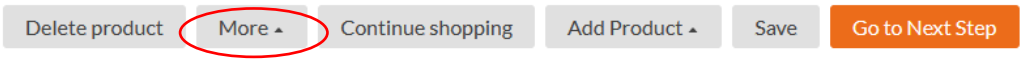
Proactis will ask for confirmation:



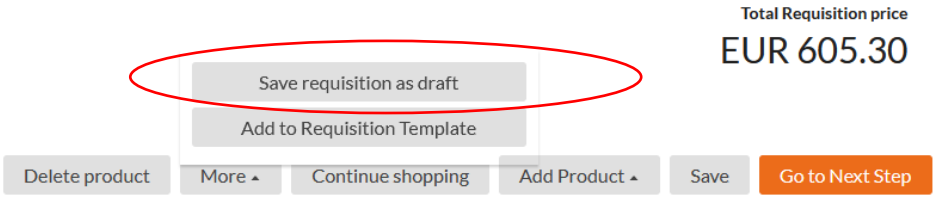
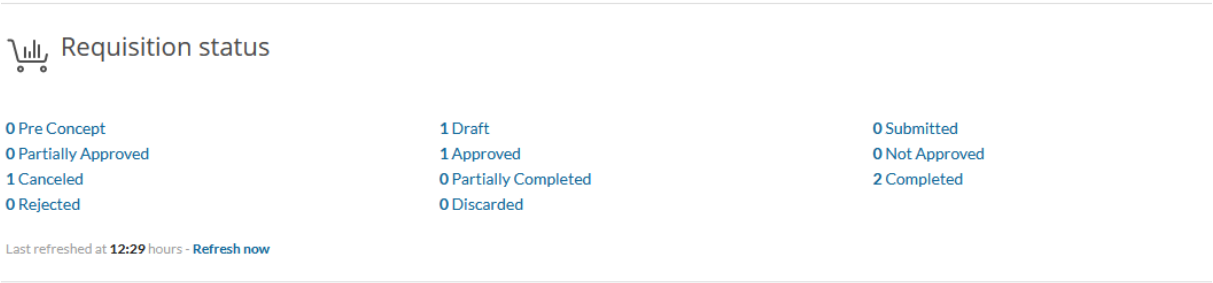
Click on **OK** and the receipt is registered.
The cycle from ordering to payment is completed on your side as a print orderer!

Temporarily save the order

NOTE: Do you need to do other things in the meantime or do you need to look something up?
Then save your order on this screen as a draft.
This can be done as follows: select the 'more' button



Select 'save as draft'



You can retrieve the draft of your order by clicking in your 'dashboard' → on 'draft'