



# Proactis Press-work order process

Version 1.0 24.03.2021

## 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.

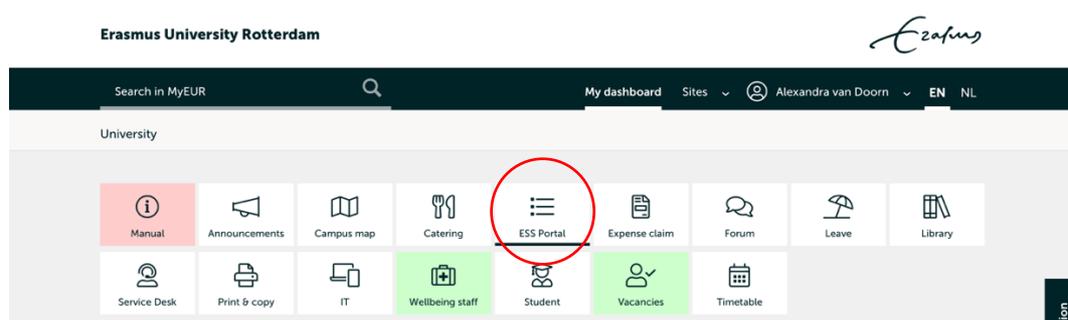
You can only be an orderer if you are **not a budget holder**.

### 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

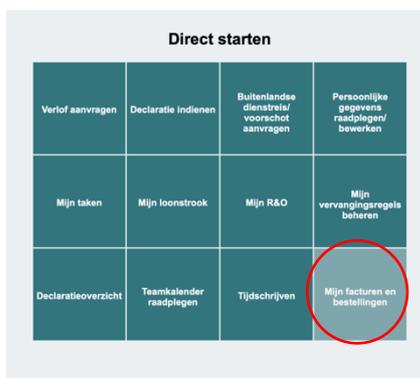
or via an EduVPN connection.



### 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.

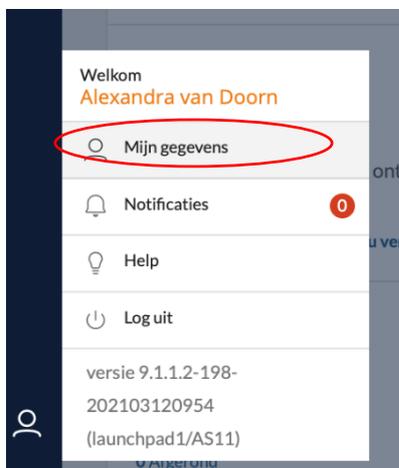
- Are you receiving an error message? → then you are not authorised to place orders → contact your financial controller/faculty.
- If you have an active account but are not authorised to order printed materials, you will not see an order tile of OBT De Bink in Proactis. → is this the case? Contact the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

Alexandra van Doorn Algemeen

Algemeen Gedelegeerden Budgetten Instellingen

Velden met een rood sterretje (\*) zijn verplicht.

Titel:	<input type="text"/>	Locatie:	<input type="text"/>
Voornaam*:	Alexandra	Kamer nummer:	<input type="text"/>
Tussenvoegsel	van	Telefoon werk:	<input type="text"/>
Achternaam*:	Doorn	Mobiel:	<input type="text"/>
Initialen:	<input type="text"/>	Telefoon Thuis:	<input type="text"/>
Email:	testmail@roactis.com	Fax:	<input type="text"/>
Taalinstelling:	Engels (Verenigde Staten)	Afleverinformatie:	<input type="checkbox"/>
Login*:	74840avd@eur.nl		
Huidig wachtwoord*:	<input type="password"/>		
Nieuw wachtwoord:	<input type="password"/>		
Bevestig Wachtwoord	<input type="password"/>		

Leegmaken Bevestigen

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

Alexandra van Doorn Algemeen

Algemeen Gedelegeerden Budgetten Instellingen

Velden met een rood sterretje (\*) zijn verplicht.

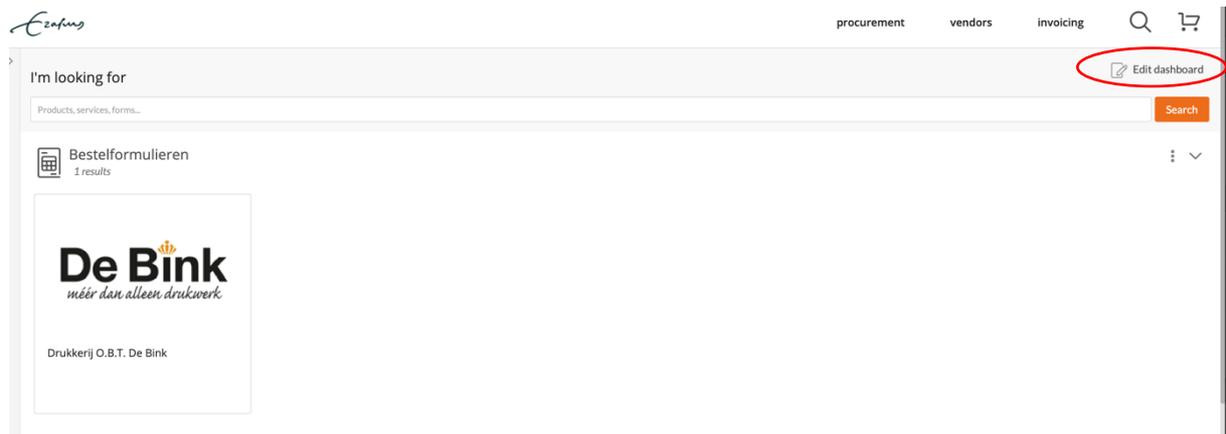
Titel:	<input type="text"/>
Voornaam*:	Alexandra
Tussenvoegsel	<input type="text"/>
Achternaam*:	<input type="text"/>
Initialen:	<input type="text"/>
Email:	<input type="text"/>
Taalinstelling:	<div style="border: 1px solid gray; padding: 5px;"><ul style="list-style-type: none"><li>Geen (Organisatie standaard)</li><li>Spaans (Spanje)</li><li>Frans (Frankrijk)</li><li>Italiaans (Italië)</li><li><b>Engels (Verenigde Staten)</b></li><li>Duits (Duitsland)</li><li>✓ Nederlands (Nederland)</li></ul></div>
Login*:	74840avd@eur.nl
Huidig wachtwoord*:	<input type="password"/>
Nieuw wachtwoord:	<input type="password"/>
Bevestig Wachtwoord	<input type="password"/>

**Step: 5 – Are you logging in for the first time?**

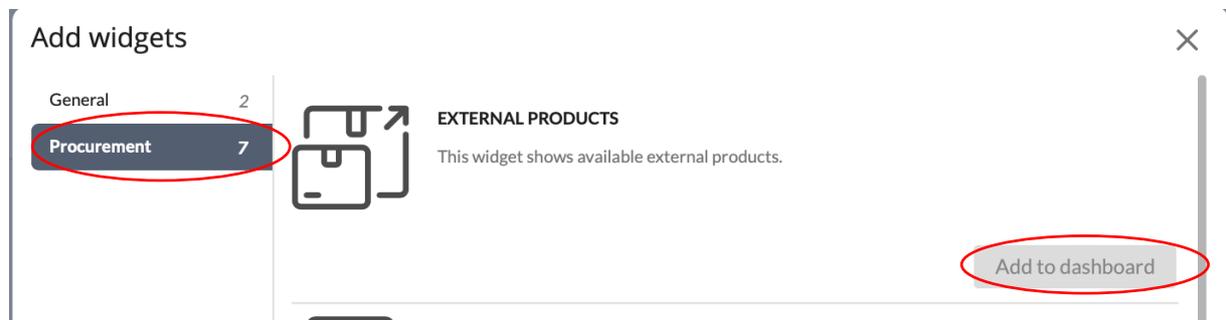
First, add the 'order forms' widget to your dashboard.

This also applies if you are already using Proactis (e.g. to order from Lyreco) but are ordering printed materials for the first time.

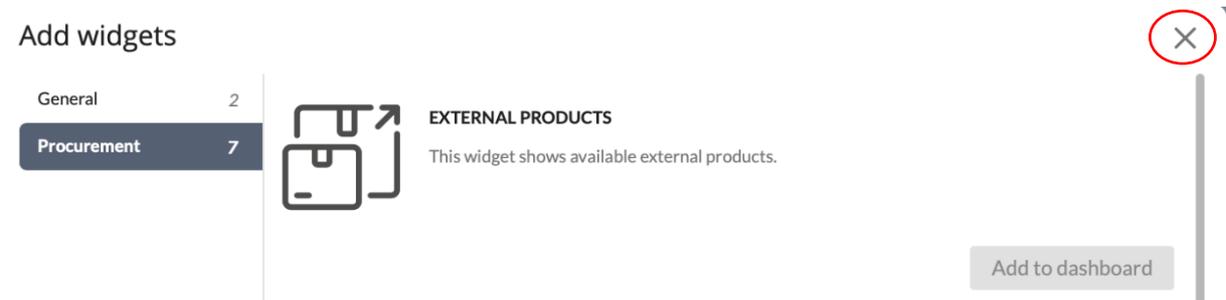
**Step: 6 – Click on 'Edit Dashboard' at the top right.**



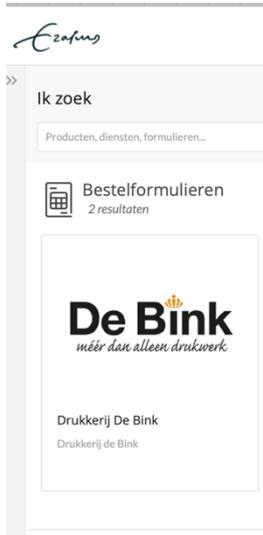
**Step: 7 – In the pop-up screen, select 'Add widgets' and in this open menu select 'Procurement' → at the right below 'ORDER FORMS', click on 'Add to dashboard'**



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'.

Cost Center\*



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.



### Cost Center Search

Cost Center Type:

Name:

Description:

ID:

Close

Reset

Search

Name

Description

ID

Type

Select

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

### Cost Center Search

Cost Center Type:

Name:

Description:

ID:

Close

Reset

Search

Name

Description

ID

Type

Select

Advies & ontwikkeling huisstijl

5

3001



Creatie & beheer huisstijltools

01

3001



Select OBТ De Bink in the 'Supplier' field.

Supplier\*

609475 - OBТ Opmeer de Bink TDS BV



**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 OBТ De Bink.  
The quote number is stated below the date.



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

**OBТ BV**  
Kerketuinenweg 8  
Postbus 43508  
2504 AM Den Haag

Leiden, 4 maart 2021  
Offertenummer: 148706

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.

Article No.\*

148706

Article Name\*

148706

**Description:** this field is not mandatory.

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

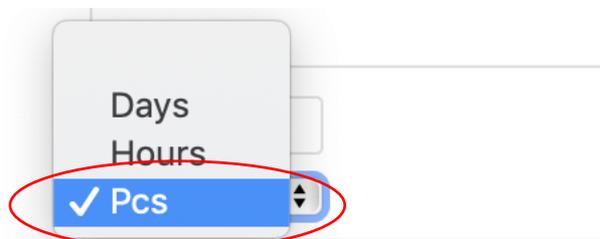
Quantity\*

1

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

Quantity\*

Unit of Measurement\*



**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.



Cost Account\*   

Currency  

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.

Base Unit Price\*

**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'.

Spending Pool   

Commodity Code   

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

Spending Pool   

Commodity Code

The following screen will open:

ID	Name	Description	Online	Select
				<input type="button" value="Close"/> <input type="button" value="Reset"/> <input type="button" value="Search"/>

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

## Spending Pool Search

ID:  Description:   
Name:

ID	Name	Description	Online	Select
01		<input type="button" value="Select"/>	Yes	<input type="button" value="↔"/>
02			Yes	<input type="button" value="↔"/>

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

Commodity Code



The completed screen will then look like this:

*Erasmus* procurement vendors invoicing

### Bestelformulier drukkerij De Bink : Add Free Format Product to the Requisition

Cost Center*	<input type="text" value="30010100.001.005 - Advies &amp; ontwikkeling huistijl"/>	Spending Pool	<input type="text" value="02 - Kantoorinrichting en benodigdheden"/>
Supplier*	<input type="text" value="609475 - OBT Opmeer de Bink TDS BV"/>	Commodity Code	<input type="text" value="206 - Drukwerk, reproductie (niet in eigen beheer)"/>
Article No.*	<input type="text" value="148706"/>		
Article Name*	<input type="text" value="148706"/>		
Description	<input type="text"/>		
Quantity*	<input type="text" value="1"/>		
Unit of Measurement*	<input type="text" value="Pcs"/>		
Cost Account*	<input type="text" value="430130"/>		
Currency	<input type="text" value="EUR"/>		
Base Unit Price*	<input type="text"/>		
Tax Rate	<input type="text" value="V7 Inkoop me"/>		

Click on: 'add and close'

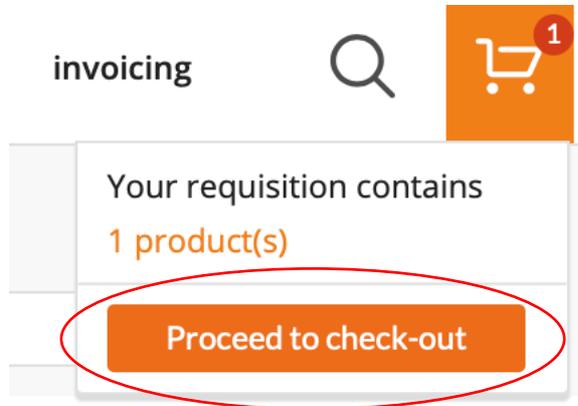
**Step: 10** – you have returned to your dashboard. You will see a 1 appearing at the top right and your product is ready in your shopping cart.

*Erasmus* procurement vendors invoicing

I'm looking for

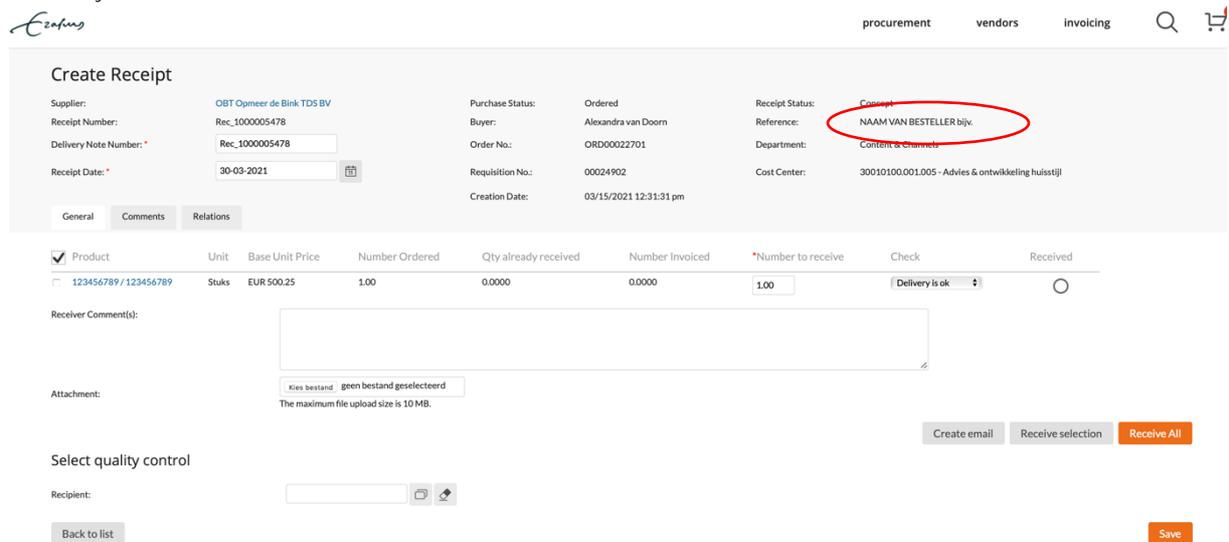
Step: 11 – select the 'shopping cart'.

The following will be displayed and you should click on 'Proceed to check-out'.



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

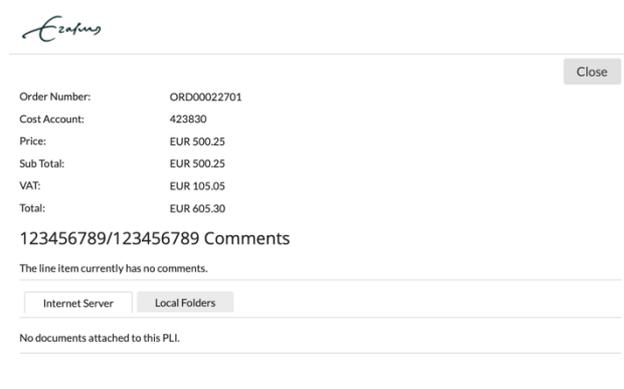
Check your order.



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.



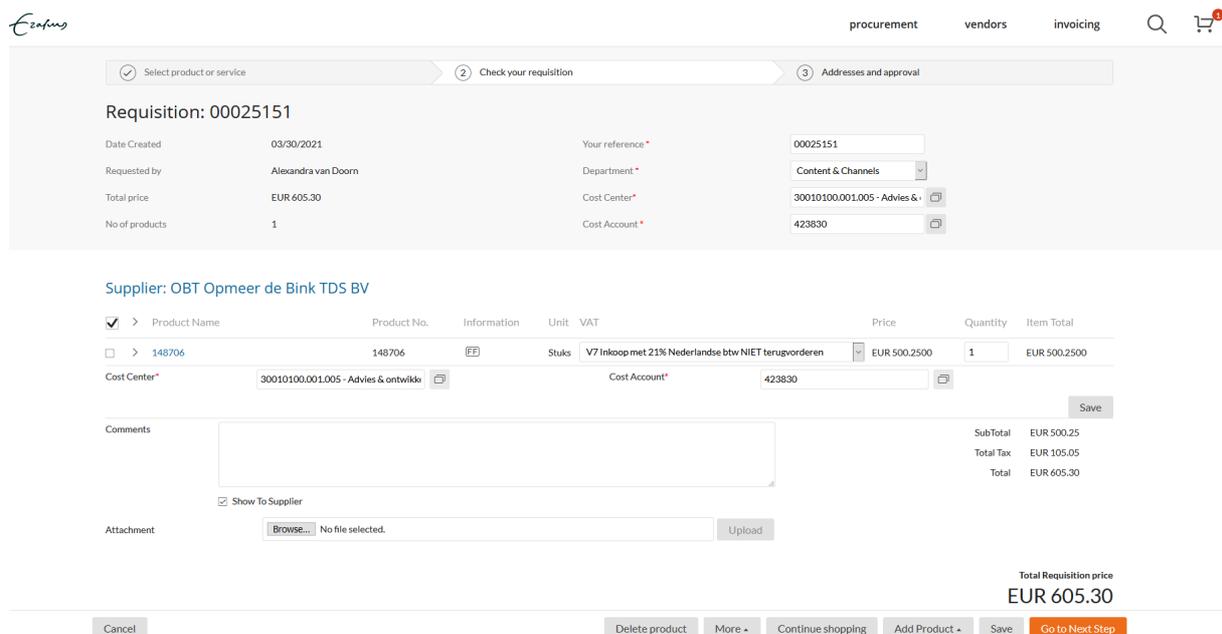
Order Number: ORD00022701  
Cost Account: 423830  
Price: EUR 500.25  
Sub Total: EUR 500.25  
VAT: EUR 105.05  
Total: EUR 605.30

123456789/123456789 Comments

The line item currently has no comments.

Internet Server Local Folders

No documents attached to this PLI.



procurement vendors invoicing

Select product or service Check your requisition Addresses and approval

Requisition: 00025151

Date Created: 03/30/2021 Your reference: 00025151  
Requested by: Alexandra van Doorn Department: Content & Channels  
Total price: EUR 605.30 Cost Center: 30010100.001.005 - Advies &  
No of products: 1 Cost Account: 423830

Supplier: **OBT Opmeer de Bink TDS BV**

Product Name	Product No.	Information	Unit	VAT	Price	Quantity	Item Total
148706	148706	EE	Stuks	V7 Inkoop met 21% Nederlandse btw NIET terugvorderen	EUR 500.2500	1	EUR 500.2500

Cost Center: 30010100.001.005 - Advies & ontwikl Cost Account: 423830

Comments

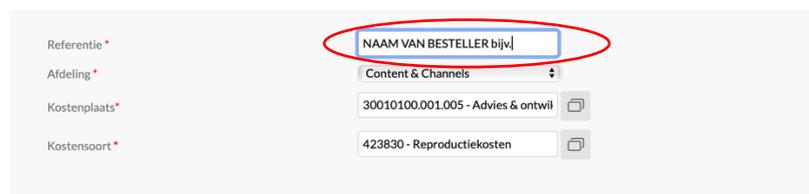
SubTotal: EUR 500.25  
Total Tax: EUR 105.05  
Total: EUR 605.30

Attachment: Browse... No file selected. Upload

Total Requisition price: EUR 605.30

Cancel Delete product More Continue shopping Add Product Save Go to Next Step

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.



Referentie: NAAM VAN BESTELLER bijv

Afdeling: Content & Channels

Kostenplaats: 30010100.001.005 - Advies & ontwil

Kostensoort: 423830 - Reproductiekosten

Does it look different in your case than ?

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

Attachment:

Kies bestand	Offerte_OBT_148706.pdf
Kies bestand	geen bestand geselecteerd
Kies bestand	geen bestand geselecteerd

The maximum file upload size is 10 MB.

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

Attachment

Browse... Offerte\_OBT\_de\_Bink 8706.pdf

Upload

Then click on **'upload'**

Attachment	Browse... No file selected.	Upload
Show To Supplier	<input checked="" type="checkbox"/> Offerte_OBT_de_Bink 8706.pdf	Delete

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.

**Total Requisition price**

**EUR 605.30**

**Go to Next Step**

### 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)

The screenshot shows the Proactis web interface with the following details:

- Navigation:** procurement, vendors, invoicing, search, and shopping cart icons.
- Progress:** Select product or service, Check your requisition, Addresses and approval.
- Delivery Information:**
  - Address Book: Department - Content & Channels
  - Delivery Address: Aflieveradres
  - Delivery Date: [Empty field]
  - Addressee: Alexandra van Doorn
  - Delivery Info: None
  - Delivery Time: [Empty field]
  - Delivery Room No: [Empty field]
- Delivery Address:**

Erasmus Universiteit Rotterdam  
Locatie goederenontvangst: Collegelaan, Theil Building (CT-170)  
Attn: Alexandra van Doorn  
Burgemeester Oudlaan 50  
3062 PA Rotterdam  
Netherlands
- Invoice Information:**
  - Address Book: Department - Content & Channels
  - Invoice Address: Factuuradres
- Invoice Address:**

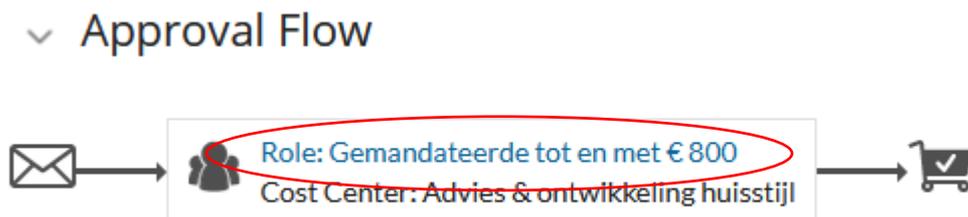
Erasmus Universiteit Rotterdam  
Accounts Payable / Crediteurenadministratie Campus Woudestein  
Burgemeester Oudlaan 50  
3062 PA Rotterdam  
Netherlands  
Digital invoice address:  
invoice.fs@eur.nl
- Approval Flow:** [Dropdown arrow]

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

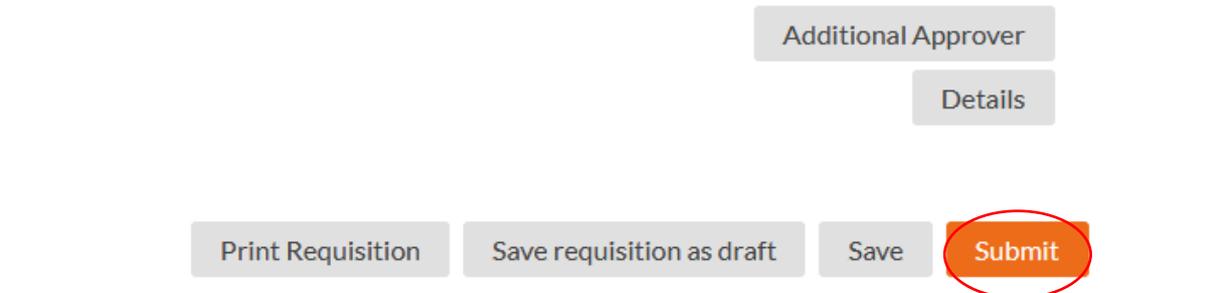
**Step: 15** – if you did not yet know who the budget holder is who should approve your order, you can see this by clicking on the arrow to the left of **'approval flow'**.

### Approval Flow

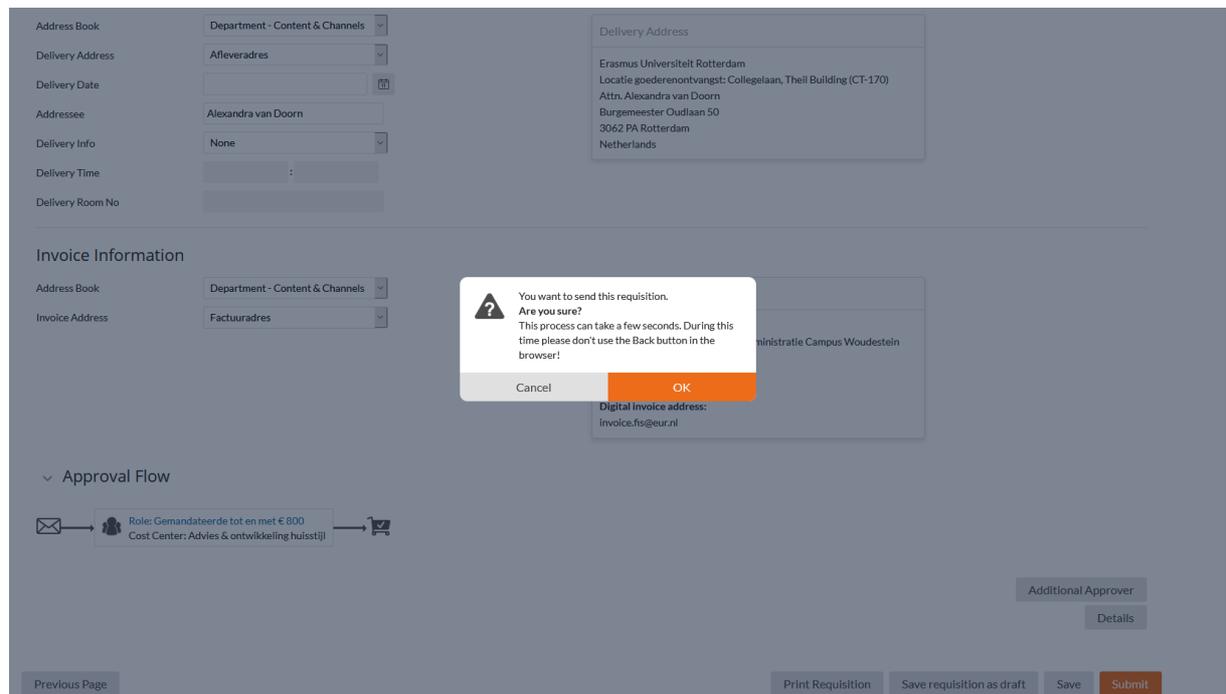
Then click on role: **'mandated up to ...'**; after this, you can see here who the budget holder of this cost centre is for your department.



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':



**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!**

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

 Bestel status

0 Pre-concept

As long as your order status says 'submitted', the order has not yet been approved.

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## Todo list

Last refreshed at 12:14 hours - [Refresh now](#)

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## Requisition status

0 Pre Concept	0 Draft	<b>2 Submitted</b>
0 Partially Approved	0 Approved	0 Not Approved
1 Canceled	0 Partially Completed	1 Completed
0 Rejected	0 Discarded	

Last refreshed at 12:14 hours - [Refresh now](#)

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### Step: 16 – order has been approved

Your order has been **approved** if it appears as approved under 'order status'.

## Requisition status

0 Pre Concept	0 Draft	0 Submitted
0 Partially Approved	<b>2 Approved</b>	0 Not Approved
1 Canceled	0 Partially Completed	1 Completed
0 Rejected	0 Discarded	

Last refreshed at 12:19 hours - [Refresh now](#)

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Upon approval by the budget holder, 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.'

## Todo list

**2** Purchase order(s) for receiving

Last refreshed at **12:19** hours - [Refresh now](#)

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.

Order Search								Open Q
Purchase Order List		Delegated Purchase Order List						
<input checked="" type="checkbox"/>	Order No. ▾	Your Reference	Status	Items	Creation Date	Supplier	Buyer	Total excl. VAT
<input type="checkbox"/>	ORD00022852	een testbestelling.	Ordered	1	03/30/2021 12:19:13 pm	OBT Opmeer de Bink TDS BV	Alexandra van Doorn	EUR 500.25
<input type="checkbox"/>	ORD00022851	NAAM VAN BESTELLER bijv.	Ordered	1	03/30/2021 12:18:49 pm	OBT Opmeer de Bink TDS BV	Alexandra van Doorn	EUR 500.25

1 - 2 of 2 items 10

[Print selected orders](#)

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:

**Create Receipt**

Supplier: **OBT Opmeer de Bink TDS BV**      Purchase Status: **Ordered**      Receipt Status: **Concept**  
 Receipt Number: **Rec\_1000005479**      Buyer: **Alexandra van Doorn**      Reference: **NAAM VAN BESTELLER bijv.**  
 Delivery Note Number: **Rec\_1000005479**      Order No.: **ORD00022851**      Department: **Content & Channels**  
 Receipt Date: **30-03-2021**      Requisition No.: **00025151**      Cost Center: **30010100.001.005 - Advies & ontwikkeling huisstijl**  
 Creation Date: **03/30/2021 12:18:49 pm**

General    Comments    Relations

<input checked="" type="checkbox"/> Product	Unit	Base Unit Price	Number Ordered	Qty already received	Number Invoiced	*Number to receive	Check	Received
<input type="checkbox"/> 148706 / 148706	Stuks	EUR 500.25	1.00	0.0000	0.0000	1.00	Delivery is ok	<input type="radio"/>

Receiver Comment(s):

Attachment:  No file selected.  
The maximum file upload size is 10 MB.

Select quality control

Recipient:

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:

**Create Receipt**

Supplier: **OBT Opmeer de Bink TDS BV**      Purchase Status: **Ordered**      Receipt Status: **Concept**  
 Receipt Number: **Rec\_1000005479**      Buyer: **Alexandra van Doorn**      Reference: **NAAM VAN BESTELLER bijv.**  
 Delivery Note Number: **Rec\_1000005479**      Order No.: **ORD00022851**      Department: **Content & Channels**  
 Receipt Date: **30-03-2021**      Requisition No.: **00025151**      Cost Center: **30010100.001.005 - Advies & ontwikkeling huisstijl**  
 Creation Date: **03/30/2021 12:18:49 pm**

General    Comments    Relations

<input checked="" type="checkbox"/> Product	Unit	Base Unit Price	Number Ordered	Qty already received	Number Invoiced	*Number to receive	Check	Received
<input type="checkbox"/> 148706 / 148706	Stuks	EUR 500.25	1.00	0.0000	0.0000	1.00	Delivery is ok	<input type="radio"/>

Receiver Comment(s):

Attachment:  No file selected.  
The maximum file upload size is 10 MB.

Select quality control

Recipient:

**?** Are you sure you want to receive the whole order with original numbers?  
The order will be closed for receipt automatically.

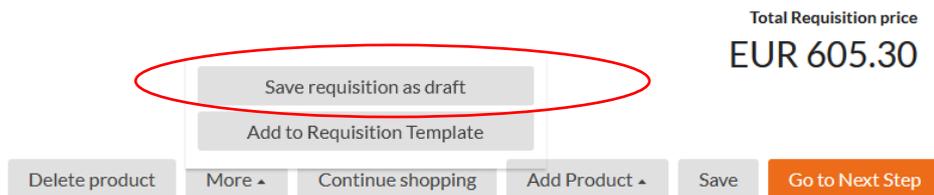
Click on **OK** and the receipt is registered. The cycle from ordering to payment is completed on your side as a print orderer!

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'

### Requisition status

0 Pre Concept	1 Draft	0 Submitted
0 Partially Approved	1 Approved	0 Not Approved
1 Canceled	0 Partially Completed	2 Completed
0 Rejected	0 Discarded	

Last refreshed at 12:29 hours - [Refresh now](#)