

### 3.4.6 eSeries User Training Guide

Issue Date July 2010, page 1 of 4

Responsible Person(s): Systems Trainer, Supply Chain Assistant/Systems Advisor

Related Documents:

### Integra eSeries WHHT Online Ordering System

Open the application 'Internet Explorer' by double clicking the icon with your mouse  
Type the following web address into the address bar and hit enter:



<http://159.170.251.168:8001/eseries/>

This will load up the Integra eSeries home page  
Enter your Username and Password to login.  
Your Username will begin with **swv**

Please login with your username and password below

Username   
Password

To make a requisition, click on **Web Basket** in the box **Solutions Explorer** on the left of the screen.

This will load up the **Solutions** box in the centre of the screen. Click on **Basket Entry** to create an order.

Please note in some cases the system may require you to lookup & enter your requester code & Req. point at this stage using the magnifying glass icon -  
Click the icon to open a pop up and then double click on your req point to select it.  
If you have multiple req points you can search each column by typing into the white box and hitting enter, then double click to select. Then click **Proceed** to enter the web basket.

In the **Search** box as above select **Item Codes and Descriptions** from the drop down menu and then enter the item description, code or supplier if you know it, and click on the **Search** button. This will bring up a list of results as below.

Item	UOI	Supplier	Qty	Unit Price	VAT Excl Value	Action
5395A - SCD Lithotomy Extension Set for Compression Sleeve xl COVIDIEN (was TYCO) - 003162 COU - 5395A CAT	EACH	003162 COVIDIEN (UK) COMMERCIAL LTD Item Ref: 5395A Contract: Preferred	1.00	16.9200	16.92	<input type="button" value="Add"/>
S-EBA Sizer-Set Contract Ref: 2008/S 172-22988 COVIDIEN (was TYCO) - 003162 COU - 020250 CAT	PACK 1	003162 COVIDIEN (UK) COMMERCIAL LTD Item Ref: 020250 Contract: Preferred	1.00	239.0000	239.00	<input type="button" value="Add"/>

Each item is listed on alternate blue or yellow lines. To add an item to your order simply type the quantity you require into the quantity column of the item row that you wish to order, and click on the **Add** button at the end of the line.

This will add the item to your cart and may open a pop up giving you the opportunity to add any notes if required.

If you can't find the item you wish to order from the search list, then you will need to place a non-catalogue requisition. In order to do this you choose an expenditure category.

Click the Home icon on the left of your screen to return to the Web Basket welcome screen.




You can locate expenditure categories from the **Search** box by selecting the **Category Codes and Descriptions** from the drop down menu. Then enter the expenditure code or budget description and click **Search**.

Search: 24420 options 0 line(s) total 0.00

Item	UOI	Supplier	Qty	Unit Price	VAT Excl Value	Action
24420-Laryngoscopes F/B/A CAT		Item Ref: Contract:	1.00	0.0000	0.00	Add
24420-Stapling Devices F/B/D CAT		Item Ref: Contract:	1.00	0.0000	0.00	Add
24420-General Medical Surgical Equipment F/B/R CAT		Item Ref: Contract:	1.00	0.0000	0.00	Add

Choose the appropriate category and click on **Add** to create a non-catalogue item. This will launch a pop-up box.

Enter the supplier, contact details, price, item code, item description, and anything else that may assist the buyer into the **Notes** field.

To search for the supplier click on the magnifying glass icon  to launch a pop-up.

Type the company name into **Supplier Name** and hit enter to search.

Then double click to add. If you can't find the correct Supplier - simply leave the field blank.

Then enter the quantity and unit price of the item ex. VAT and click **Ok** to add the item to your cart.

You can also search for category codes by selecting the Categories icon from the Options on the left hand side of the screen. This will open up an A to Z of categories in the sidebar.

You can open up each subcategory by clicking on it. This will then open up a list of all catalogue items under this expenditure code the last item will be the category code and can be used to create a non-catalogue item as above.

**Options**


- Home
- View Cart
- Categories
- Exit

**History**

- Categories
- W - Office Telecoms Computers & Stationery
- WA - Computer Hardware & Software

**Items**

- 56030-Printer MFD / Copier Hire / Lease

Once you have added all the products you wish to order click on the cart symbol  This will take you to your shopping cart, and will list all the items in your order.

Robin Bartlett (000610), HSMC OPERATIONAL BUYING-GATE HOUSE (QH0061)

Rowe 1..1 of 1 Results							
Item	UOI	Supplier	Qty	Unit Price	VAT Excl Value	Action	
24420-Laryngoscopes <i>R/B/A CAT</i>		Item Ref: Contract:	1.00	1500.0000	1500.00	<input type="button" value="Remove"/>	<input type="button" value="Edit..."/>

Rowe 1..1 of 1 Results			
Order Lines	Products	Category Items	Total Value
1	0	1	1500.00

You can view and edit non-catalogue items by clicking on **Edit**. Once you have checked they are correct, click on **Order Summary** to proceed.

At this stage you can also select **Continue Ordering** to continue shopping or **Save Basket** to save your items till next time and **Save Template** in order to set up a request template.

The following Requisitions will be created...

Supplier Name	Total	Additional Information	Options
	1500.00		<input type="button" value="Attachments"/>
			<input type="button" value="Click here to Complete Order"/> <input type="button" value="Complete Order"/>

To place your order click on **Complete Order**.

### Checking the Progress of your Request

To check on your requisition's progress when you log in, click on 'Web Basket' in the box 'Solutions Explorer' on the left of the screen, then click on 'Requisition Enquiry' in the 'Solutions' box in the centre of the screen.

You can then search by a variety of terms, as depicted below:

Requisition Number	Web Reference Number
PO Number	Supplier Code
Requisitioner Code	Requisition Point Code
Location Code	Delivery Location Code
From Date	To Date
Category Code	Catalogue Code
Header Description	Line Description
Sort Sequence	Authorise Requisitioner Code
Sort Direction	Status
	Search for rejected Only

Solutions	
	<b>Requisition Entry</b> Enter new requisition for goods or services
	<b>Requisition Amend/Cancel</b> Requisition Amend / Cancel
	<b>Requisition Intervention</b> Approve requested spend
	<b>Requisition Approval</b> Approve spend and authorise supplier / contract details
	<b>Requisition Enquiry</b> Enquire on the status of raised requisitions

Once you've entered the information you wish to search by. Click on the 'Search' button to proceed. This will load up a list of orders that conform to your search criteria. Select view to see the order details, and check the order status. Click on 'Back' to return.

Once your order has been approved and processed, it will automatically be sent to the supplier. When the delivery has been made to your receipt & delivery point, they will confirm it as received, and you will receive an email notification that it has been received.

## eSeries Basket / Template Usage

You may wish to take advantage of the eSeries **Basket** and **Template** tools, these are especially useful with repeat orders and non-catalogue items.

Once you have added items to your shopping cart to create a request, go into your shopping basket as usual to in order to complete the request. Below your order lines you will see four buttons:



**Back to ordering** - will return you to your last shopping category/search screen.

**Save Template** - will save your requested items as a named request template available to anyone who orders for the same requisition point.

**Save Basket** - will save your requested items for you to reload basket and request at a later date.

**Complete Request** - will process your request as usual.

Description	Item Code	Price	Units	Notes	Quantity	Ind. Total	Remove
Medigenic USB Keyboard and Mouse Combo-CO	MEDI COMBO-UK	194.00	EACH		1.00	194.00	
Cumulative Total						194.00	

In order to load a saved basket or to make a template order, simply go to the **Search/Load Options** screen and select **Basket** or **Template** from the **Load Basket/Template** option.

**Search**

Search Item Codes and Descriptions

To reload a saved basket, click on **Basket** and you will see a list of Requisitioner Baskets that you have saved. Click **Load** to reload the basket and continue with your request, or **Delete** to delete the saved basket.

**Previous Orders**

**Load Basket/Template**

Requisitioner Baskets			
File Name	Date Created	Action	
Keyboard Order	11/13/2008 10:44:38	<input type="button" value="Load"/>	<input type="button" value="Delete"/>

To load a template click on **Template** and you will see a list of Requisitioning Point templates that have been saved by requesters against your Req. point. Click **Load** to load the template and make a request, or **Delete** to delete the template - please do not delete other requesters templates.

Requisitioning Point Templates			
File Name	Date Created	Action	
Medical_keyboard	11/13/2008 10:15:41	<input type="button" value="Load"/>	<input type="button" value="Delete"/>

Then complete your request as normal - further details on pages 1-2 of the user guide.