TrackITS version 2

Request Order Tab for Requesting a Purchase

To request an order, complete the Purchase Requisition Form

Login

Use the following process to log into **TrackITS**:

1. Open an Internet application and go to the **TrackITS** homepage at: https://trackits.psu.edu

Security verification may appear. Select Continue.

2. The Penn State Web Access **Authentication** screen appears. Enter your *Penn State user ID* and password and click **OK**.

Penn State user ID should be "xyz5000" not "xyz5000@psu.edu".

Create New Order

Use the following process to create a new order form:

1. Click **Request Order**.

Select a Vendor

Use the following process to suggest a vendor:

1. Click on a vendor name under **Select Vendor**. **Vendor Info** is populated above the **Select Vendor** box.

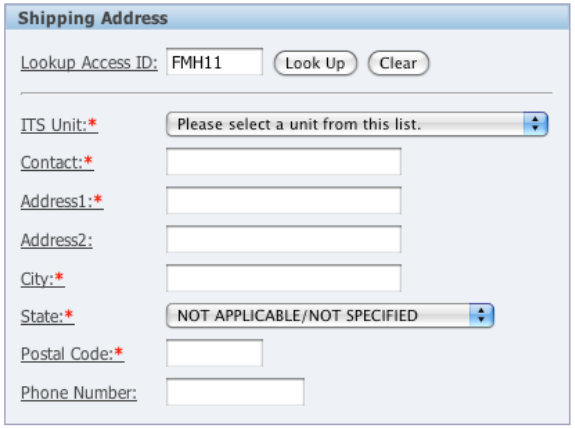
*Use **Search Vendors** to enter search criteria to narrow vendor list. Each character entered will further narrow the vendor list.*

*To add a new Vendor or new Contact, click **Add Vendor** or **Add Contact** button. To edit Vendor or Contact, select a vendor and click **Edit Vendor** or **Edit Contact** button. The **Add/Edit Vendor** screen overlay appears.*

Input Shipping Address

Use the following process to choose shipping address:

1. Enter a *Penn State user ID* in the Lookup Access ID field, and click **Look Up** to retrieve the user's information.



2. All fields in the **Shipping Address** area should automatically populate with the user's information.

*You may modify **Shipping Address** fields if the address needs to be changed.*

Select Special Delivery Method

Use the following process to select special delivery method:

1. Choose **Delivery Option**.

Standard delivery is the default selected delivery method.

***Special Delivery Instructions** field appears when the **Special Direct Delivery Required** radio button is selected.*

Enter Order Item Information

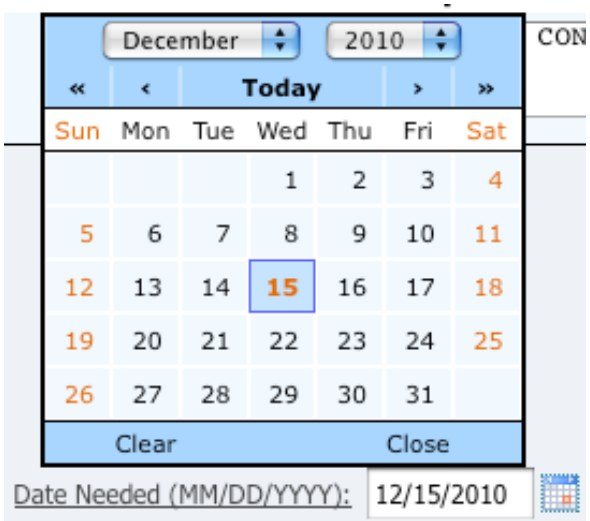
Use the following process to enter item:

1. Enter Quantity (Qty), Catalog #, Model #, Description, and Cost Each.
2. Click Add an Item to add item. A new item row appears.

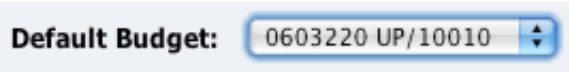
***Total Cost** per line and **Total Estimated Cost** will be automatically adjusted according to entered values for **Quantity** and **Cost Each**.*

*To delete an **Order Item**, click the red 'X.' The deleted row will have a pink background. To reinstate a deleted **Order Item**, click the 'red 'X' again.*

3. Click on the calendar icon, and select the Date Needed, or manually enter the date.



4. If an alternative budget is required for the entire order, then use the Default Budget drop down to select a different profile.



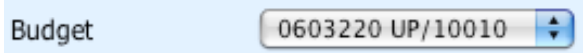
Optional Edit Line Item Budgets
(Not Required to Change for Requestors)

Use the following process to edit, split, or delete budget:

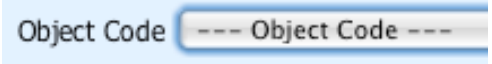
1. Click Edit Budgets. The **Edit Line Item Budgets** screen appears.

2. Select a Fiscal Year from dropdown.

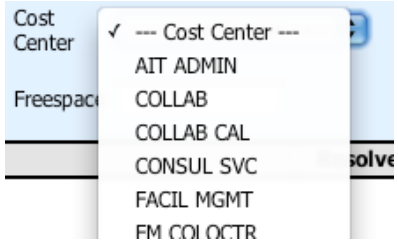
3. Select Budget from dropdown to change the budget.



4. Select an **Object Code** from **Object Code** dropdown.



5. Select a **Cost Center** from the **Cost Center** dropdown list.



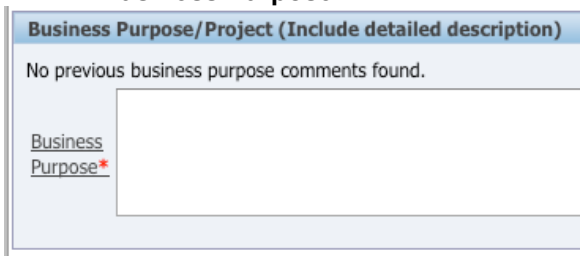
6. Select a **Sub-Object**, if given sub-object from **Cost Center**.

7. To add a Budget Split, click **Add Split**, and redistribute the **Estimated Amount $** for each budget/cost center/object code combination to be used. The **Item Cost Remaining $** will be automatically adjusted.
8. *Click **Update Budget Details / Save** to save the changes made, and to return to the **Purchase Requisition Form**.*

Enter Business Purpose/Project

Use the following process to specify a purpose for the order request:

1. Enter a detailed description in the **Business Purpose.**



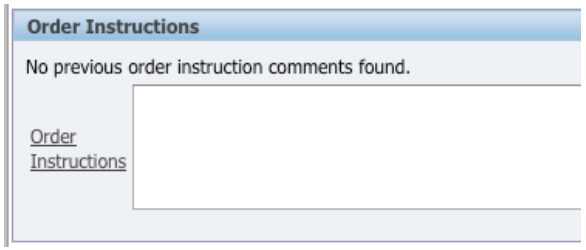
*This description will be automatically populated in the **PCard Support Form Description**.*

Requestor has the option to add more to the Description throughout the form routing.

Enter Order Instructions

Use the following process to specify order instructions:

1. Enter the order instructions in the text box.



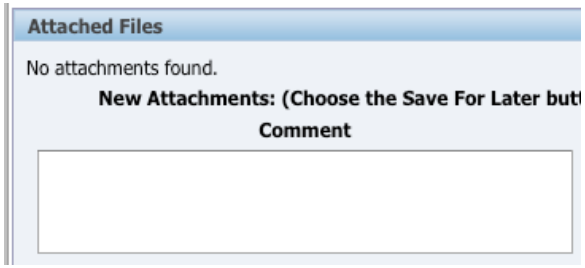
Order Instructions can relate to special pricing or budgets and cost centers to be charged, or a URL of a Web site.

Requestor has the option to add more to the Order Instructions throughout the form routing.

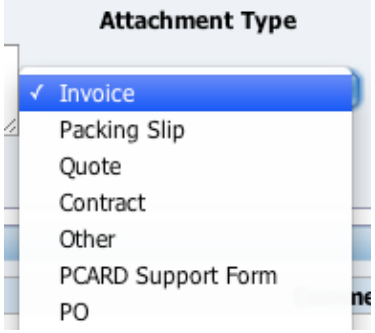
Upload an Attachment File

Use the following process to upload relevant files to a specific order request:

1. Add a comment regarding the attachment in the **Comment** area.



2. Select **Attachment Type** from dropdown.



3. Click **Browse…** to attach file. A Finder screen appears on a Mac, or a 'Choose File to Upload' Window appears on Windows.
4. Navigate to, and select the desired file, and click **Open**.

A new Attachment box will appear after one file has been attached.

Requestor has the option to add more Attachments throughout the form routing.

The maximum individual attachment file size permitted by TrackITS is 10MB .

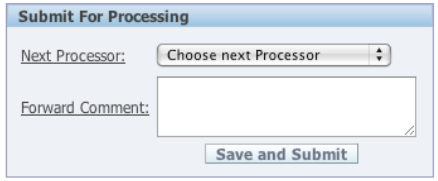
Common file types allowed are: .DOC, .DOCX, .GIF, .PDF, .TXT, .TIF.

*Click **Save for Later** if you need to add more than 5 attachments to the request.*

Select Next Processor

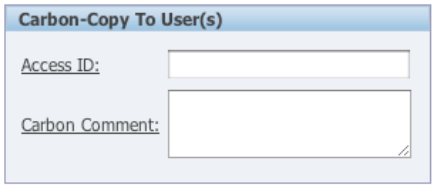
Use the following process to submit order to an Approver to approve the request:

1. Select the **Next Processor** from the dropdown.
2. Click Save and Submit.



Input Comment in Forward Comment box if needed.

*Requestor may also **Carbon Copy** additional user(s) by entering their User ID(s) (comma separated) into the Access ID field in the Carbon-Copy to User(s) form area.*



Save, Submit, or Cancel Request

Use the following process to Save for Later, Save for Tracking Only, Save and Submit, Duplicate Order, Cancel Order Request, or view a Printer-friendly Version of the Order:

1. Select one of the following options:

a. Save for Later

b. Save for Tracking Only

c. Save and Submit

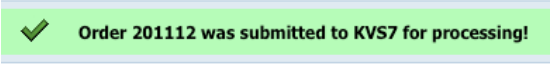
d. Duplicate Order

e. Cancel Order

f. Printer-friendly Version

*Fields marked with a red asterisk * are required and must be completed.*

Confirmation message appears, once order has been submitted for processing.



Navigate away to cancel order request without saving.

E-Mail Notifications for Forms Awaiting Action

TrackITS generates e-mail notifications for the following actions:

- **Approvals**—Requestor receives e-mail stating request has been approved.
- **Carbon Copy**—User receives email when he/she is copied on a request.
- **Submitted to Processors**—User receives email when request/order is waiting for action.
- **Financial Support** receives email when an order is marked **Received**, and/or when an invoice is **OKayed for Payment**.

View Requested Order

Use the following process to view requested order(s) in My Orders:

1. Click **My Orders** on the Main Menu Bar. **My Orders** screen appears.

*See **My Orders** Documentation for further instructions.*

Contact TrackITS

Contact for additional help:

- trackits@psu.edu