

# Online Order Request (Staff)

Visit: [www.hved.org](http://www.hved.org)

Click on “Employee’s Section”

Log into “Employee’s Section”

Click on “Leave, Time Off, and Online Ordering”

On the Smart Systems – SMART eR page, fill in your username and password.

Warning: If you are using a public computer, certain web browsers may automatically save your PDF documents that have been opened. These may be viewed by other people. To keep your information secure, please log out of SMART eR and delete your files out of this computer's 'Downloads' folder.

Browsers/Software Supported

- Internet Explorer 10.x, 11.x, Edge -or-
- Safari 5.1, 6.x, 7.x, 8.x, 9.x -or-
- Firefox 38.x, 39.x, 40.x, 41.x -or-
- Google Chrome 45.x, 46.x
- Adobe Acrobat Reader 9.x, 10.x, 11.x

## Login to Online Ordering

1. Log onto the SMART eR website.
2. Enter your User ID and password.
3. Click on Login.
4. From the SMART eResources menu, click on **Requests & Approvals**.

Pay and Personal Information Requests and Approvals Reports Other

Purchasing Vehicles Responsibilities

5. Then click on **Purchasing**.
6. If you desire to order from a vendor’s webstore, see the next section “**Ordering with Online Vendors**”. If you desire to enter a request for items to be ordered, see “**Online Order Request**” on page 5 .





# Ordering with Online Vendors

(Preapproved vendors through the Express Ordering online system)

The screenshot shows a web application menu. At the top, there are tabs: 'Announcements', 'Requests and Approvals' (selected), 'Reports', and 'Other'. Below these are sub-tabs: 'Pay and Personal Information', 'Requests and Approvals' (selected), 'Reports', and 'Other'. Under the 'Requests and Approvals' sub-tab, there are links: 'Purchasing', 'Vehicles', and 'Responsibilities'. The 'Purchasing' link is expanded, showing a list of options: 'Order Request Form', 'Ordering' (highlighted in blue), and 'Place Order'.

1. Click on **Requests and Approvals|Purchasing|Ordering**. The online vendors a district can choose from today include: Corporate Express (Staples), Innovative Office Solutions, Office Max, School Specialty, Frey Scientific, Classroom Direct, Broadhead Garrett, Hammond & Stephens, Follett, Office Depot, Lakeshore Learning and Express.
2. Click on the Shop button next to the Vendor you want from the list. (Regions will automatically set up all vendors in the list that the district chooses.)

## Ordering

	Vendor Name
	INNOVATIVE OFFICE SOLUTIONS
	OFFICE MAX
	SCHOOL SPECIALTY/
	STAPLES CUSTOMER SERVICE

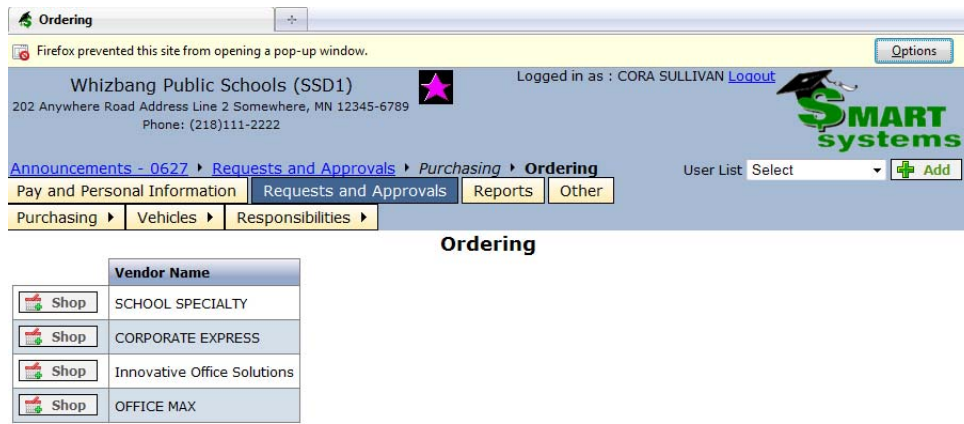
3. The new website will open in a new window (Internet Explorer) or tab (Firefox).

The screenshot shows a web browser window with the OfficeMax website. The browser's address bar shows the URL: <https://maxbuyer.officemax.com/integration/shopmvc.selectDefaultShoppingMethod.web>. The page title is 'Order By Product Code - Internet Explorer provided by Dell'. The page content includes a 'Shopping Cart' section with 'Number of Items: 0' and 'Subtotal: \$0.00'. There are buttons for 'View Cart' and 'Checkout'. Below the cart is a search bar with 'Keyword/Product #' and a 'Go' button. To the right of the search bar is a table with columns 'Product Code\*', 'Qty\*', and 'UOM'. The page also features a 'Live Online Assistance' button and a 'Breakroom Savings' banner.

## Firefox

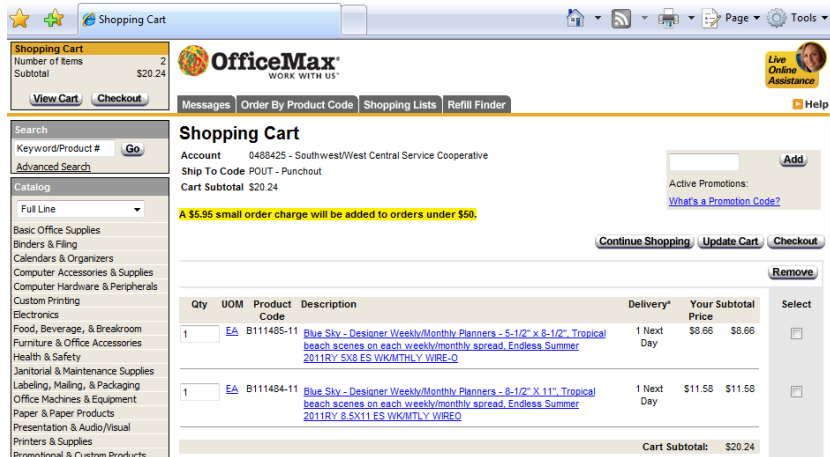
The screenshot shows a web browser window with the OfficeMax website. The browser's address bar shows the URL: <https://maxbuyer.officemax.com/integration/shopmvc.selectDefaultShoppingMethod.web>. The page title is 'Order By Product Code'. The page content includes a 'Shopping Cart' section with 'Number of Items: 0' and 'Subtotal: \$0.00'. There are buttons for 'View Cart' and 'Checkout'. Below the cart is a search bar with 'Keyword/Product #' and a 'Go' button. To the right of the search bar is a table with columns 'Product Code\*', 'Qty\*', and 'UOM'. The page also features a 'Live Online Assistance' button and a 'Breakroom Savings' banner.

**NOTE:** You may get a warning depending on your browser and security settings. For example:



Click on the options button and allow pop-ups. Re-click on the shop button for the vendor you want.

4. Shop for items needed and click on Add to Cart. (The following steps may differ depending on the vendors' website setup.)
5. When everything is in the cart and you are done, **check to see if you are still logged into SMART eR and haven't timed out.**
  - a. If you are - click Checkout.



- b. **If you have timed out, re-login into SMART eR.** (This was changed in so that users placing large orders could shop as long as they need and then not have to worry about losing their order. It would look like the following:



Re-login on the SMART eR window and then click on the check-out link in your ordering window.

6. You will then receive a summary window in SMART eR showing the items ordered.

## Ordering Checkout

Description	Quantity	Unit Price	Unit Type
PLASTIC CLIPBOARD BLUE	5	4.21	EA
0 BUBB MAILER 6X10 200PK KRAFT	1	61.06	CT

Requested Fiscal Year  Ship to Location

Ledger Type  Account Code

Vendor Notes/Prints on PO

Comments

7. The following fields can be entered prior to Transfer.

- Fiscal Year – default in
- Ship to Location-required; defaults in
- Account Code – Optional if account code is known
- Vendor notes/prints on PO area-Optional for entry
- Comment area – Optional for entry. This field is for any additional information that may be needed to process the order. Such as a specific grant that is to be used for coding or perhaps a specific site should be charged for the items, etc.

f. Add Attachment – Optional. This allows one file attachment that may assist with processing the order.

8. Click on Transfer button. This will transfer the order to SMART Finance. **NOTE:** *Your order will not be viewable in SF unless you do this step!*
9. If the transfer is successful, it **will** close the page and return you back to the original window. If there is a problem with your order, the window **WILL NOT** close. It will provide a list of errors for you to see and correct.
10. If you are finished, click on the logout link in the header.

## Online Order Request

(Vendors listed in HVED's vendor database)

(Vendors

The Online Order Request allows the user to create an electronic order request form for any active vendor in your district's SMART Finance vendor listing.

1. Follow **Login to Online Ordering** procedures for SMART eR
2. Click the **Requests and Approvals|Purchasing|Order Request Form** selection in the menus.

The screenshot shows the SMART eR navigation menu. The top bar includes 'Announcements' and 'Requests and Approvals'. Under 'Requests and Approvals', there are tabs for 'Pay and Personal Information', 'Requests and Approvals', 'Reports', and 'Other'. The 'Requests and Approvals' tab is active, showing a sub-menu with 'Purchasing', 'Vehicles', and 'Responsibilities'. The 'Purchasing' sub-menu is expanded, showing 'Order Request Form', 'Ordering', 'Place Order', 'Purchase Order Detail', 'Purchase Order Detail by Vendor Name', and 'Requisition Detail Summary'. To the right, there is a 'Requests and Approvals' section with 'District Forms' and 'Employee Forms'.

3. To start a new order, click on the "Start Cart" button. To retrieve a cart, click on the "Retrieve Cart" button.

### Order Request Form

Two buttons are shown: 'Start Cart' and 'Retrieve Cart'. Both buttons have a small red icon with a green arrow pointing right.

Previously saved carts are automatically deleted by the system after two weeks.

### Start Cart

The screenshot shows the 'Start Cart' form in the SMART eR system. The top navigation bar includes 'Announcements', 'Requests and Approvals', 'Purchasing', and 'Order Request Form'. The 'Order Request Form' is the active page. Below the navigation bar, there are 'Start Cart' and 'Retrieve Cart' buttons. The main form area contains several fields: 'Requested Fiscal Year' (2015), 'Ship to Location' (1 - Area School-1 - Location-1), 'Ledger Type' (E), 'Account Code' (with a 'Find' button), 'Comments' (with a 'Comment noted here' text area), 'Vendor Notes/Prints on PO' (with a 'Note to the vendor' text area), 'Vendor Code' (03245 with a 'Find' button), 'Vendor Group' (1), and 'Alt Address' (with a 'Find' button). There are also buttons for 'Add Attachment' and 'Click Save to Enter Items'. At the bottom, the 'Vendor Name' is listed as 'H.W. WILSON COMPANY' with address '123 Sunny Street, Somewhere, IL 12345' and 'Vendor Fax# 218-214-5689'.

4. The **Requested Fiscal Year** will auto fill in, change if necessary.
5. Select a **Ship to Location** from the drop down list. This is a required field and something needs to be entered there.
6. Enter an **Account Code** if known. This is an optional field for entry. Do not enter anything other than numbers or else the window will give you an invalid format error.
7. Enter any comments necessary. The **Comments** field would be used for any information that the user would like the Business Office to know such as; a specific grant is to be used for coding or perhaps a specific site should be charged for the items, etc. It can be left blank also.

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**Note:** The headings in red have a hover feature available. Place your cursor on the wording and it will provide more information.

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8. Enter any comments for the vendor that may be necessary. The **Vendor Notes/Prints on PO** field would be used for any information that the user would like printed on a Purchase Order in SMART Finance.
9. **Vendor Code** is a required field (\*). Enter a Vendor Number or click on “Find” to display all vendors.
  - a. Click on Find - Select a vendor from the list. If the vendor is not listed, please contact the Business Office to create a vendor for you.
10. If there is an alternate vendor address, enter the Address Code into the **Alternate Address** field or click on Find for an available list.
11. Add Attachment – Optional. This allows one file attachment that may assist with processing the request.
12. Click on the “Save” button to save the vendor information.

Employee Name: Aaron Adams  
Order Date: 04/22/2015

Fiscal Year	Location	Comment	Vendor Code	Vendor Group	Alt Address	Vendor Notes/Prints on PO	Ledger Type	Acct Code
2015	1 - Area School-1 - Location 1	Comment noted here	03245	1		Note to the vendor	E	

Vendor Name: H.W. WILSON COMPANY  
133 Sunny Street  
Somewhere, IL 12345  
Vendor Fax#: 218-214-5689

Request Total: \$187.80

Item/Description	Units	U.Type	Rate	Discount	Total Cost
Item XYZ	12.00	EA	15.65	0.00 %	187.80

13. In the **Item/Description** field, enter the catalog number and the item description.
14. Enter the number of **Units**.
15. The UnitType (**U. Type**) will default to EA. Change it if necessary.
16. Enter the **Rate**. For more information about what is allowed in this field, place your cursor over the Rate column heading.
17. Enter a **Discount** if needed. The field allows up to 7 digits such as 00.0000% or 000.000% if needed.
18. Click the “Save” button to save your row.

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**Note:** When adding a new row, or editing a row, the window changes to edit mode and the rest of your order is not visible; however, it is there. Once save is clicked all of the rows entered will be listed.

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19. It will automatically calculate the **Total Cost** per row and the Request Total.
20. Click the “Add New” button to add another row.
21. Repeat the above steps until finished.
22. Otherwise, when finished with all rows, click on the “Transfer” button at the top of the screen.

23. The system will transfer the request to SMART Finance and a message will be returned, "Your Order Request has been transferred to SMART Finance".
24. If you wish to place another order, repeat the above steps. Otherwise Logout (see **Logout** procedures).

### To retrieve items from a Saved Cart

1. Click on the "Retrieve Cart" button at the top of the page.

The screenshot shows the 'Order Request Form' interface. At the top, there is a navigation bar with links: [Announcements](#), [Requests and Approvals](#), [Purchasing](#), and [Order Request Form](#). Below this, there are tabs: [Pay and Personal Information](#), [Requests and Approvals](#), [Reports](#), and [Other](#). Under the 'Requests and Approvals' tab, there are sub-links: [Purchasing](#), [Vehicles](#), and [Responsibilities](#). The title 'Order Request Form' is displayed on the right. Below the navigation, there are two buttons: 'Start Cart' and 'Retrieve Cart'. Under the 'Retrieve Cart' button, there is a section titled 'Choose a cart to open' with the text 'Vendor Code:'. Below this, there are two dropdown menus: 'Vendor' and 'Cart Values'. The 'Vendor' dropdown shows '----- Vendor -----' and the 'Cart Values' dropdown shows '----- Cart Values -----'.

2. Enter values in each of the drop down lists and then it will display the request that was selected.
3. Continue following the previous steps to add/remove items as needed.

**YOU MUST ALERT YOUR CLUSTER ASSISTANT AND SUPERVISOR THAT YOU HAVE AN ORDER WAITING TO BE TRANSFERRED. IF YOU DO NOT, THE ORDER WILL DISAPPEAR AFTER 14 DAYS.**

**THANK YOU.**