e-Portal Web Orders Instructions:

Login Page

Please save the [http://opa.uchc.edu/UCHC_ePortal_1.htm](http://opa.uchc.edu/UCHC_ePortal_1.htm) in your favorites. This is the page that you must Login from. Important information regarding the system will be displayed on this page. Once at this page go to Order Entry to login.

Login Security

**User Name:** Type in your Active Directory User ID (Login that you use for your PC/ MAC)  
**Password:** Type in your Active Directory Password  
**Submit:** Select the OK button to continue
The user is directed to this screen when the user successfully logs into the application. This screen consists of all possible options the user has in the application in the form of buttons. The Open Orders button will bring the user to the Open Orders screen. The Assign Orders screen will allow the user to assign order to accounts. The Log Off link returns the user to the Login screen. The Help button link will open a new window consisting of help information for the selected option. The account balances will come from the FRS tables. Each Supplier that this application supports is listed either under the Internal or Vendor Order information box.

**To Place an Order:**

1. **Click on the Supplier Name**
2. The Materials Management (Includes Central Warehouse and Pharmacy) are internal Health Center Services available through e-Portal. Dental and Molecular Core Lab are only links and not currently part of the e-Portal Web Orders System.
3. **Follow the Supplier’s Order or Shopping Cart Process** (this may be different for each Supplier)
4. **Follow the Supplier’s Checkout Process** (this may be different for each Supplier)
To Place an Order through the Materials Management System:

1. Type in the Warehouse Part Number then tab to the next field or place the cursor in the Quantity box. The product description and general information will be displayed (picture if available).

2. If the information is correct, enter the quantity that you want to order, paying special attention to the unit of measure. The unit of measure is displayed to the right of the Quantity box. Select the Add button to move the item to your shopping cart. The shopping cart items will be displayed as shown in the diagram above.

3. To add more items to your order, follow the same process.

4. When completed select the CONTINUE button.

5. Once you select the CONTINUE button you will be brought to the Assign Order Screen to submit your order.
To Place an Order through the Pharmacy e-Portal System:

1. The Pharmacy ordering program works basically the same way as the Materials Management program. There are a few differences. You will notice that the description fields are more detailed, as we want to give you as much information as possible to place your order correctly.

2. Type in the Drug ID Number then tab to the next field or place the cursor in the Quantity box. The product description and detailed information will be displayed.

3. If the information is correct, enter the quantity that you want to order, paying special attention to the unit of measure. The unit of measure is displayed to the right of the Quantity box. Select the Add button to move the item to your shopping cart. The shopping cart items will be displayed as shown in the diagram above.

4. To add more items to your order, follow the same process.

5. When completed select the CONTINUE button.

6. Once you select the CONTINUE button you will be brought to the Assign Order Screen to submit your order.

For questions or help, please call John Laboda, Pharmacy Systems Coordinator, at 679-2782.
Additional Ordering Information

Look Up Items Using Catalogs or Search:

1. If you do not know the Warehouse or Supplier Number, select the “Magnifier Glass” Icon to look up items.

2. Once you select the Icon a second window will appear with a search by Part # Description and All Categories. See Diagram on the on next page.

3. You can either type in a description or part number or use the All Categories search. Both search programs work primarily in the same way.

4. In the example below we have selected All Categories for our search. We have selected Adhesives, Bandages and Drains from the drop down menu. Now select the GO button to display the category/catalog listing.

5. Once you select GO the products in the category/catalog will be listed. Scroll up or down until you find the item that you are looking for. Once you find the item, use the Select feature on the left to add the item to your cart. To view a picture of the item select Image (not all items have pictures).
### Search Part Number - Microsoft Internet Explorer provided by UHC

#### Part # or Desc:

<table>
<thead>
<tr>
<th>Part #</th>
<th>Description</th>
<th>Stock</th>
<th>UOM</th>
<th>Price</th>
<th>View Image</th>
</tr>
</thead>
<tbody>
<tr>
<td>90034</td>
<td>BANDAGE ELASTIC 4 10pk SubCode: 3102 Where: D06A</td>
<td>151</td>
<td>EA</td>
<td>$0.33</td>
<td>[image]</td>
</tr>
<tr>
<td>900100</td>
<td>TAPE ADHESIVE H.D. 1/2 24RLSDKX SubCode: 3182 Where: D06C</td>
<td>95</td>
<td>RL</td>
<td>$0.3</td>
<td>[image]</td>
</tr>
<tr>
<td>905325</td>
<td>DRESSING SALINE 8x4 46W/CDS DRESSING WET PACK SubCode: 3182 Where: D06D</td>
<td>27</td>
<td>BX</td>
<td>$30.72</td>
<td>[image]</td>
</tr>
<tr>
<td>905330</td>
<td>COTTON ABSORBENT 1 LBN/CDS 25RL/CDS SubCode: 3181</td>
<td>23</td>
<td>RL</td>
<td>$4.28</td>
<td>[image]</td>
</tr>
<tr>
<td>905332</td>
<td>Gauze Strips Plain 1/4 12EA/CDS SubCode: 3182 Where: A35C</td>
<td>14</td>
<td>EA</td>
<td>$2.69</td>
<td>[image]</td>
</tr>
<tr>
<td>905334</td>
<td>Gauze Strips Plain 1/2 12EA/CDS SubCode: 3182 Where: A35C</td>
<td>23</td>
<td>EA</td>
<td>$2.68</td>
<td>[image]</td>
</tr>
<tr>
<td>905336</td>
<td>Gauze Strips Plain 1/2 12EA/CDS SubCode: 3182 Where: A35C</td>
<td>8</td>
<td>EA</td>
<td>$3.05</td>
<td>[image]</td>
</tr>
</tbody>
</table>
1. Click on ASSIGN ORDERS button to assign accounts to pending orders.
2. Select the Pull Down menu ORDER TYPE and select Materials Management or Vendor, depending how you placed the order.
3. Select the Pull Down menu ORDERS and select the order number/name that you placed. Your order will be displayed below in a few seconds.
4. Select the FRS account that will be charged from the ACCOUNTS pull down menu.
5. Select the appropriate Ship-To address from the ADDRESSES pull down menu.
6. Select the appropriate Subcode from the SUBCODE pull down menu.
7. If you need to select a different Subcode for each line item, then you must select the Subcode on the line item detail.
8. If you need to use more than one FRS Account, you may do so by selecting the Split Account by Percent box and select the account and percent. Please make sure that you total 100% when completed.
9. You may also assign a different FRS account to each line item by selecting the Accounts by Line box.
10. Click on the SUBMIT button to place the order. You must click the SUBMIT button to place your order! The item detail box at the bottom will be gone, and a Pop-Up Window will appear. This Window is your actual Invoice and Order Confirmation Notice. Simply select the Print option, and the form will print at your local printer.
11. To delete your order, click on the DELETE button. Your order will be deleted.
12. To reset the information provided, click on the RESET button. You may now enter new information.
13. You must now Log Off the system by selecting the LOG OFF button.
14. The next step will allow you to track any open orders in the system. These are orders that have been placed, but have not been received.
View Open Orders

The **Open Orders** button will allow the user to view all orders in the database that have yet to be fully received. The Order Number value in the grid will be a link to another popup window which will list the detailed order information for the selected order.

1. **Click the OPEN ORDERS button.**
2. **If there are any open orders, they will be displayed on this screen. If there are no orders displayed, then all orders have been received.**
3. **To view the detail of each order, click on the PO number.**
4. **When completed you may Log Off.**
The Queries button will allow the user to search and print out a few basic reports. A important report for the Hospital & Clinics is the **Search by Item and Since Date**, as it allows you to search for needed product in the case of a stock-out or emergency.

**Order Search**

1. **Click on Search by Ord Number** to find an order that you have placed.
2. **Click on Search by Account and Date Range.** If you forget your order number, this feature allows you to search for it by Account and Date Range.

**Item Search**

1. **The Search by Item Number** allows the user to search the Materials Management catalogs for a specific item(s). Pictures are available on many items.
2. **The Search by Item and Since Date** allows the user to find an Item and where it may be stocked. This feature is helpful in an emergency situation due to a stock-out.

**Example: Search by Item and Since Date**

<table>
<thead>
<tr>
<th>Part Number</th>
<th>Description 1</th>
<th>Description 2</th>
<th>Description 3</th>
<th>View</th>
<th>Date Ordered</th>
<th>Ship To Name</th>
<th>Ship To Addr</th>
</tr>
</thead>
<tbody>
<tr>
<td>900029</td>
<td>EYEGLASSES, PROTECTIVE</td>
<td>30EA/CS</td>
<td>PROTECTIVE EYEGLASSES</td>
<td>small</td>
<td>10/24/2005</td>
<td>ICU - LOCATION A</td>
<td>H2043</td>
</tr>
<tr>
<td>900029</td>
<td>EYEGLASSES, PROTECTIVE</td>
<td>30EA/CS</td>
<td>PROTECTIVE EYEGLASSES</td>
<td>large</td>
<td>10/18/2005</td>
<td>ICU - LOCATION A</td>
<td>H2043</td>
</tr>
<tr>
<td>900029</td>
<td>EYEGLASSES, PROTECTIVE</td>
<td>30EA/CS</td>
<td>PROTECTIVE EYEGLASSES</td>
<td>small</td>
<td>10/17/2005</td>
<td>ED: MATERIALS SUPPLY ROOM</td>
<td>CM313</td>
</tr>
<tr>
<td>900029</td>
<td>EYEGLASSES, PROTECTIVE</td>
<td>30EA/CS</td>
<td>PROTECTIVE EYEGLASSES</td>
<td>small</td>
<td>10/12/2005</td>
<td>ICU - LOCATION A</td>
<td>H2043</td>
</tr>
<tr>
<td>900029</td>
<td>EYEGLASSES, PROTECTIVE</td>
<td>30EA/CS</td>
<td>PROTECTIVE EYEGLASSES</td>
<td>small</td>
<td>10/08/2005</td>
<td>NEONATAL</td>
<td>H2043</td>
</tr>
<tr>
<td>900029</td>
<td>EYEGLASSES, PROTECTIVE</td>
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<td>PROTECTIVE EYEGLASSES</td>
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<td>H2043</td>
</tr>
<tr>
<td>900029</td>
<td>EYEGLASSES, PROTECTIVE</td>
<td>30EA/CS</td>
<td>PROTECTIVE EYEGLASSES</td>
<td>small</td>
<td>10/07/2005</td>
<td>MED/SUROS</td>
<td>H5001</td>
</tr>
</tbody>
</table>
If there are other Reports & Queries that you would like developed for e-Portal, please contact Materials Management at 679-1953.