Accessing E-Way

1. Launch Web Browser
2. Go to the Duke Procurement Services Web Page at www.procurement.duke.edu
3. Press the Enter key
4. Click on Corporate Express
5. Choose the Order on EWAY icon
6. Press Enter key
7. The EWAY Sign On Page will appear

Logging into E-Way

1. Type your User ID
2. Press Tab key
3. Type Password

*Note – User ID and Password are case sensitive (i.e. SYSPASS is not the same as syspass).

4. Press the Enter key or click on the Sign-In link button.

Forgotten Passwords

* Important – Use the link on the sign-in page labeled “Forgot your password?”

User Profile Screen

This screen is used to set the Order Header page defaults. To access click on the Profile link button.

• The first time you click on this button you will get a Pop up window, click OK

Change the defaults to suit your specific needs.

Click on “UPDATE PROFILE”
The screen will blink/refresh You may now click “Create Order”

Navigating around E-Way

Do not use Browser Back Button

• The first time you log in, you will be prompted to change your password. Follow the instructions given. (the “current password” matches your ID)
• Browse Catalog – allows you search, view, and order items from an online catalog.
• Create Order – brings you to the Order Header page.
• Current Order – shows any items that have been requested for the current order.
• Express Order – allows you to work with previously saved forms (handy for regular orders)

Smart Search

1. Select Browse Catalog from current page location.
2. Click on Smart Search link button (shown above).
3. Enter information you want to search by. This will normally be Product Description. *Note – You must enter a value in at least one of the available fields. Also Product Descriptions should not be plural (i.e. Pens).
4. Enter Filter By criteria, if desired. Click in the box next to the desired item to place a checkmark in the box. This will activate this criteria and only look for items meeting these criteria.
5. NOTE: To view entire contract catalog put a check next the green dollar sign
6. Click on Search button to initiate search based on criteria and filters chosen.
7. To clear settings, click Reset.

Ordering Supplies

Items can be ordered two ways:
• Using the online Catalog
• Directly into the Current Order form
Using the Catalog

1. Using procedures for Browsing the Catalog on previous page, locate the item to order.
2. Click in the Quantity box next to the item.
3. Enter desired amount
4. Press Tab Key – Current Order form will be updated.
5. Continue on to next item.

To delete ordered items while browsing the catalog:

*Note – this can only be done if the order has not previously been submitted for approval.

1. Locate desired item.
2. Click in the Quantity box.
3. Delete the value entered.
4. Press the Tab key.

*Note – Unlike the same procedure when using the Catalog, this action will remove the line item from the Current Order Form.

1. Click the Current Order link button.
2. Click in the next available line
3. Enter Quantity desired.
4. Enter the Item Number
5. Press Tab – remaining fields will be filled in.

To delete items:

1. Click in Quantity field
2. Delete the value entered.
3. Press the Tab key.

*Note – This process will not remove the item from the Current Order form, but will remove the dollar amount from the order total. When the Current Order Form is viewed, the quantity field will show a zero (0)

Current Order Form

The Current Order Form shows the details of the current order. Also known as the Shopping Cart.

Order Icons

When viewing items in the catalog, and while viewing the Current Order Form, any of five icons can appear. The following icons provide information about the product...

- $ - Contract Item – “We Save Money!”
- MWBE – Minority/Women Business Logo
- Tree – Recycled materials
- Magnifying Glass – click to view complete details about the item.
- Book – Click to see the catalog page where this item appears.

Order Status

In the upper right-hand corner of each screen is the Current Order Status. Information displayed is:

- Saved Status
- # of items ordered
- Current total of order

Submit Order for Approval

1. View Current Order Form to verify all desired items have been selected.
2. Click on Submit Order link button along the bottom of the screen.
3. Order will be saved and an Order Number assigned. You will need this number to reference this order in the future. If you assigned an Order Name in the Header this is not as important.
4. Order will go to CEXP

Saving an Order

An order can be saved without submitting it for 60 days. After 60 days it is purged from the system.

1. From the Current Order Form, click on the Save Order link button along the bottom of the screen.
2. Order will be saved and an Order Number assigned. You can access it later to finish the order, using the Order Search Button, or submit it.
Express Orders

This feature is handy for regular bulk orders, or if you have a preference for a particular brand / type of item.

You will create a form listing all of the items you are likely to order regularly. The form is saved and then accessed when needed.

Unlike other items, it does not get purged from the system after 90 days.

Setting up a Form

1. Click on the Express Orders link button.
2. Click on Create Express Order button.
3. Enter an Order Name. This will be helpful for referencing the form for future orders. For example, you might need standard supplies for each new employee. Therefore, you would create a form called New Employee.
4. Express notes field is for your own information
5. Items are entered in the Express Order Form the same way as if you were filling out the Current Order Form. You may Browse the Catalog to create this form.
6. To view the Express Order Form while Browsing the Catalog, click on Current Order link button.
7. For each item in the form, it is recommended that the Quantity field be zero (0). This will guard against accidental orders if this form is submitted by mistake
8. Each form may include up to 150 different line items.
9. After completing the form, click on Save Order link button. An Order Number will be assigned.

Viewing and Modifying an Express Order Form

1. Click on the Express Orders link button.
2. Click on the Search button. This will display all Express Order forms you currently have set-up.
3. Select the saved form you wish to modify.
4. Click on the Modify Order link button.
5. Make the desired changes.
6. Click on the Save Order link button.

Placing an Express Order

1. Use the procedures to view an Express Order Form.
2. Select the form and click on the Requisition Form link button.
3. Key in the quantity required.
4. Press Tab
5. Click on Current Order link button. The system will update the Current Order Form.
6. Click on the Submit Order link button.

Getting Help

While working in the E-Way system, there are two link buttons for getting assistance.

- Tutorial – on-screen demonstrations on how to work in the system.

Tutorial

Very similar to Step-By-Step Help accept the instructions appear in the blue area on the left-hand side. On the right side is where the demo for the help topic that you selected will appear. To see a demo, click on the Show Me link button.
Order Searches

When an order is Saved or Submitted for Approval, you have the ability to recall it to continue working on it.

*Note* – The options you have for Saved orders are very different than orders that have been submitted for approval.

Saved Orders

These are orders that you saved, but have not gone into the system for approval. These orders can be modified, deleted, or submitted for approval.

1. To locate a saved order, click on the Order Search link button.

2. This will bring you to a screen where you can enter parameters for the order search. The default is to retrieve All orders. This will include Express Order Forms, Pending Approval orders, Denied Orders, and Saved Orders.

3. If desired, enter in specific search criteria.

4. To view only certain order types (i.e. Saved) click on the drop-down arrow for Status and choose desired type.

5. Click on Search. Orders matching the criteria set will be displayed on the right-hand side of the screen.

6. Click in the radio button (example shown above) next to the desired order to select it.

7. Select the appropriate link button along the bottom of the screen.

Submitted Orders

Orders that have been Submitted for Approval are retrieved similar to Saved Orders. To view only Submitted Orders do the following:

1. Access the Orders Search Results screen (shown at left), click on the drop-down arrow for Status and select Pending Approval.

2. Click on Search.

3. Any orders that have not been released to Corporate Express will be displayed.

*Important* – Once an order has been submitted for approval, you are not able to modify that order. You can only view it or delete it. Changes to the order will need to be done by your manager during the approval process.

Very Important Points

- To view entire contract, when in the Smart Search, put a check next to the green $ and click search. Wait a few seconds and the entire contract will appear.

- Remember to fill out your profile correctly. See the "User Profile Screen" section of this manual.

- If you have any questions please refer to either the Help button or the Tutorial Button.

- You may also call: 1-800-353-3375