Ordering from a Template

From the home page, click **Templates** from the menu bar. You can either add all items from your template by clicking the **Add** button, or enter the list and select which lines you would like to add to your cart. This will then add the items from your template to the shopping cart where you can change quantities etc as normal. Additional items can be added to the cart or it can be simply submitted.

Quick Save

For security reasons you will be disconnected from PECOS after 1 hour of inactivity. Therefore, if you are in the middle of building a shopping cart and need to leave it temporarily, you have the option to save it. To do this you must be in the shopping cart view. You can then click the button marked **Quick Save**. When you log back into the system, PECOS will restore your shopping cart and allow you to complete it.

Submitting

Once you are happy that the requisition is correct, you must click the S**ubmit** button. This will send the request to the next stage for approval according to the system set-up for your organisation.

Approvals

If an order requires approval, the system will route the order to a predefined approver. The approver of an order will receive an email containing a link which will take the approver to the requisition that is to be reviewed. He/she has the option to either "approve", "reject" or (in some cases) "edit" the order by clicking on buttons at the top of the screen. In some cases, the approver can "approve" or "reject" the request directly from the email by clicking the relevant button embedded in the body of the email. Alternatively, the approver can enter the PECOS system directly and check their "To Do" list to see all the orders awaiting their review.

Depending on what you are purchasing, there may be multiple approval steps. Keep an eye on the audit trail and status of the document to see who the document is with for approval.

Checking Order Status

Click "Documents" on the menu bar of the home page. You must now identify which orders you would like to look at by entering details within the search criteria. You can be as specific or general as you like. Clicking "Search" will show you all orders you have raised today or within the date range you have specified.

Once the results appear, you can click on them individually to show a detailed order status summary.

PO Print Preview

If the PO has been sent to the supplier you can view and save or print a copy of it by clicking on the **View PO** button within the "Purchase Order Status" page.

Receipting

Locate the purchase order that requires receipt from the status screen. Click on the Receipt action button on the right hand side of the order. Enter the delivery note number, the date of delivery and any receipt comments. Click on the "receive all" button to receive all items at once. Alternatively, enter specific quantities at line level within the "quantity to receive" field for each item. Click "save new receipt". The status of the receipt should now read partially, fully or over received depending on the number of items received on PECOS.

Getting Help

PECOS has a powerful online help tool which can be accessed by clicking the **question mark** button in the top right of all the pages within the system.

PPS has published several one page guides, user manuals and online training courses which can be accessed at http://nhspps.uk.

You can also get help by logging an enquiry with the PPS help desk online at http://nhspps.uk, or by telephone on 020 3322 1935

PECOS

Reference Guide

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Logging in

Open your browser and navigate to https://pps.pecosipm.com. You can also access the site through the navigation menu of http://nhspps.uk

You will be taken to the PECOS log in page. Enter your username and password credentials that you have been provided with.

Forgotten Password

If you have forgotten your password details, you can click on the link on the login page and enter your username to request a password reset. You will receive an email within a few minutes with instructions on resetting your password..

Changing Password

If using PECOS for the first time you must change your password. To do this click "Password" on the home page menu bar. You must enter your new password twice in the fields provided and click submit to confirm the change. Remember, passwords are case sensitive.

Quick Search

In the quick search field on the home page and on the search screen you can enter a keyword or product code and the system will pull out all relevant catalogue entries. You can then refine the search results to give more detail by entering further criteria into the search field and clicking **Filter**. This will limit the catalogue entries shown from the first search.

Item search

The item search screen allows you to narrow down your search based on numerous criteria. e.g. you can search specifically on manufacturer name and/or item description and include parameters i.e. "Sony", "Projector"; or you can allow synonyms and spelling errors to be considered.

Sorting Search Results

Search results can be sorted by any column within the table of results by clicking on the white column name.

Requisition creation from catalogues

Once you have found the item you wish to order you must add a quantity to the appropriate field on the left and click the blue button marked **add** at the top of the screen. You can repeat this until you have added all that is required. These items can be from different suppliers. Items for each supplier will be put into separate orders. Several orders can be raised within one requisition.

Requisition creation from external marketplaces

Select the required supplier from the external marketplace section of the Items page. A shopping basket can now be filled within the punch-out site and once this is taken to the checkout the shopping list will be copied into the requisition on PECOS.

Adding Non-Catalogue Items to a Requisition

If the item you wish to order is not in the punch-out site or catalogue, click on the **Add Non-Catalogue Item** button within the shopping cart. This should only be raised for existing suppliers within the drop down list or marked as unknown supplier. You must then add all the known details about the item required including description, price and quantity. Once all of the information has been added you can either click on **Add and Return** which will take you back to the shopping basket or **Add and Stay** which will allow you to stay in the non-catalogue item page to add further line items to the order.

If you are requesting a new product or wish a new entry to be added to the catalogue, you will need to attach the relevant eForm to your requisition to justify the request. This will be subject to additional approval, so it is advisable to separate these items from standard catalogue purchases to avoid delay.

✕ Removing an Item

To remove an item from a shopping cart, first view the cart. Next click the **X** icon next to the item you wish to remove. You can also remove all items in an order (supplier), or requisition (all items) by clicking the **X** icon at the appropriate level.

Adding Attachments and Comments

Attachments and comments can be added at line, order (supplier) or requisition (document) level by clicking on the paper clip. Both attachments and comments can be added as Internal, meaning they will only be viewed by users within PECOS; and external, meaning they will be transmitted to the Supplier with the PO.

To add an attachment, browse for the file on your computer, provide a description and click the **Add New Attachment** button.

Changing Financial Tracking Codes

If, for any reason you need to change the accounting assignment from the default or dummy code you can click on the magnifying glass and open the book icon. You can then edit the account assignment and/or split the order across multiple financial tracking codes.

Submitting a Shopping Cart

Once ready to submit the order, the user is to go into the shopping cart and to click S**ubmit**.

Viewing a requisition

Click on the **Documents** menu item and search for your document to view its status and progress.

Changing Orders

To change the number of items you would like to buy after submitting your PO, click on **Documents**, find the PO, select the document using the hyperlink and then click **Change PO**. Change the quantities within the quantity field. Click outside of the box to ensure the change has taken effect. Ensure the appropriate radio button is selected at the top of the screen and click the **Submit PO change** button.

Creating a Template

If you order the same items regularly a template order can be set up for the future. To do this, compile a shopping cart and then click the button marked **Save as Template**. Select a name and folder where this is to be saved. The user can also select whether it will be "private" for the user only or "public" for an entire department to select.