

## Catalog Requesting in P2P: Quick Start Guide

**Application Services Customer Support:** 514-4100, Option 2, Option 2 (Mon-Fri 8-5)

1. Log into **PeopleSoft** from a UCSF computer or through VPN access:  
<https://peoplesoft.ucsf.edu/psp/fsp/d/?cmd=login>
2. Enter **User ID**. If unknown, contact your Access Administrator.  
Note: *P2P users will use the same User ID for RAS, Journals and WebLinks access.*
3. Enter **Password** and click **Sign In** button. Click "[Forgot Your Password?](#)" link if needed.

**Download P2P documents** from CPBC website, including information on P2P vendors and the P2P Requesting Manual: [http://cpbc.ucsf.edu/p2p/how\\_to\\_use\\_p2p](http://cpbc.ucsf.edu/p2p/how_to_use_p2p).


### Step 1: Navigate to find Vendor Catalogs

Navigate to **eProcurement>Create Requisition** to the **Add Items and Services** page.

### Step 2: Fill Shopping Cart

1. Select Catalog to start shopping. View Vendor offerings at: [http://cpbc.ucsf.edu/p2p/411\\_on\\_p2p\\_vendors](http://cpbc.ucsf.edu/p2p/411_on_p2p_vendors).
2. Fill shopping cart from catalogs (see steps and tips on reverse):
  - a. **Perfect Commerce** Catalog
  - b. **Agreement Items** Catalog
  - c. **OfficeMax** Catalog
  - d. **CDW** Catalog

### Step 3: Prepare to Checkout

1. Select "Yes" or "No" for **HIPAA**.
2. OPTIONAL: Type **Requisition Name** or **Comments** for entire Requisition.
3. OPTIONAL: Click  at line level to add **Comments** and **Attachments**.
4. OPTIONAL: Change **Attention** default to recipient of goods.



### Step 4: Provide Ship and Pay Information

*See Requesting Manual for details on splitting ship to locations and splitting charges to multiple chartfields. Below steps involve single ship to location and single chartfields for entire Requisition.*

1. Click [Select All / Deselect All](#), and click **Modify Line / Shipping / Accounting** to open page.
2. Type or lookup **Ship To** location.  
*TIP: Become familiar with your frequently used **Ship To** location codes and keep a list next to your computer.*
3. Type chartfields in **Fund, DPA, Program, FYR**.
4. Click **Apply** to return to **Review and Submit** page.
5. Click **Save & Submit**, and review **Confirmation** page.

## Step 5: Add Ad Hoc Approvers and Reviewers

*OPTIONAL: Add Ad Hoc Approvers and Reviewers according to Department's Business Process.*

1. From **Confirmation Page**, click  next to current Approver box to add in sequential order or click  [Start New Path](#) to add in parallel order. New window opens.
2. Select **Approver** or **Reviewer**, and type or lookup **User ID**. Click **Insert** to return to Confirmation page.
3. Click **Apply Approval Changes**.

## Shop from Perfect Commerce Catalog

1. Select **Vendor Catalogs** tab from **Add Items and Services** page.
2. Click [Search Manager](#) to begin. Page opens to **Advanced Search** tab.
3. Type item description in **Enter the Search Text**, and click **Search**. **Search Result** tab opens.

*TIPS: If you can't find what you need, try these search techniques:*

### Key word search:


- Replace characters, such as dashes, %, &, with the wildcard \* (asterisk)
- Use the wildcard \* (asterisk) before or after key words (i.e., search for O-Ring by typing **\*ring**)
- Add or delete spaces (i.e., 15 ml vs. 15ml)
- Begin with limited search criteria, adding more details to narrow search results
- Utilize to expand search for misspelled words, interchange of words, phonetic spelling, and semantics.

### Part number search:


- Replace spaces, dashes, or characters such as %, &, with the wildcard \* (asterisk)
- Add wild card \* (asterisk) as the last digit in a part number

Utilize **Fuzzy Search**, be creative, and don't give up!

Still can't find your item? Call 514-4100, Option 3 for help.

4. Update **Quantity** and click  next to item to add to cart.
  - Select **Advanced Search** tab to add other items from Perfect Commerce catalog.
5. Select **Cart** tab to view items in cart.
6. Click **Send to Requisition** when Perfect Commerce shopping is complete. **Create Requisition** page opens.
  - Select **Add Items and Services** tab to add items from Agreement Items or OfficeMax catalogs.
7. Click [Review and Submit](#) to proceed to P2P checkout process.

## Shop from Agreement Items Catalog

1. Select **Agreement Items** tab from **Add Items and Services** page.
2. Type **Vendor** or **Description** to search for items, and click **Search**. Search results appear.
3. Update **Quantity** and click  next to item to add to cart.
  - Select **Add Items and Services** tab to add Agreement Items or items from Perfect Commerce or OfficeMax catalogs.
4. Click [Review and Submit](#) to proceed to P2P checkout process.

## Shop from Punch Out Catalogs (Office Max)

1. Select **Vendor Catalogs** tab from **Add Items and Services** page.
2. Click [Office Max](#) to begin. OfficeMax **Manage Orders** page opens.
3. Click **Create New Office Product Order** to search for items.
4. Type item description in **Search**, and click **Go**.
5. Select category or brand to narrow search on **Search Results** page.
6. Type **QTY** (quantity) and click **Add to Cart** to add item to cart. **Shopping Cart** page opens.
  - Click **Continue Shopping** to add more items from OfficeMax catalog.
7. Click **Checkout** when OfficeMax shopping is complete.
  - Select **Add Items and Services** tab to add items from Perfect Commerce or Agreement Items catalogs.
8. Click [Review and Submit](#) to proceed to P2P checkout process.