HELPFUL TIPS FOR DIRECT CONNECT REQUISITIONS FOR McKesson

The following tips have been developed to help UTHSCSA users become quickly familiar with creating a Direct Connect requisition for McKesson in PeopleSoft Financials.

<table>
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<tr>
<th>About Direct Connect</th>
<th>Direct Connect is more than just a requisition type in PeopleSoft Financials. It also describes technology that allows us to directly connect to a vendor’s website. Vendors with whom we have established a Direct Connect relationship are typically preferred suppliers of the U T System Supply Chain Alliance or have another type of agreement with the Health Science Center. This means that the pricing listed on the Direct Connect vendor’s website has been established through the appropriate procurement method and requires no additional competition or justification.</th>
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<tbody>
<tr>
<td>About the Vendor</td>
<td>McKesson is a leading medical supply company that distributes medical-surgical supplies and homecare supplies. McKesson’s pharmaceutical distribution network supplies more than 40,000 pharmacy locations across North America.</td>
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</table>
| How to Create a Direct Connect Requisition for this Vendor | 1. Create a Direct Connect requisition.  
2. You can select the vendor by clicking the ![Vendor ID button](image1) for the Vendor ID field. Select Vendor ID 0000150110.  
3. Complete the rest of the Requisition Defaults page.  
4. Either click the ![Continue button](image2) or click on ![2. Add Items and Services button](image3) .  
5. On the **Add Items and Services** page, click on ![McKesson Medical-Surgical](image4) to “punch out” to the vendor’s website. |

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Once you punch out of PeopleSoft, the first page you will see is McKesson’s **Working Cart** page. Here you can enter catalog numbers if you know them; however, most users will want to shop for catalog items using one of the many different ways McKesson has provided to search their catalog.

You can return to the Working Cart page at any time by first clicking **Home** on the menu. From the sidebar menu that appears, click **Start New Order**.
McKesson lets you search their extensive catalog of products and services in a variety of ways. Here are some of the most popular methods.

1. **Use the Search Box.** Enter a catalog number or item description. Add precision to your search by clicking on this button on the Search box.

2. **Select a Product Category.**

3. **Select a Product Catalog.**
Shopping Cart and Checkout

- When you have completed ordering items, click on your shopping cart.

- Click the Punchout button.

- Click the Submit button.

- The contents of your shopping cart appears in your PeopleSoft requisition.
Within minutes after your requisition has been approved, a scheduled process will source your requisition to a purchase order which is then automatically dispatched to the vendor. Typically, within a few hours, the vendor will send an order confirmation similar to the one shown below. The subject line and first sentence will contain the Purchasing buyer’s name, but the email is sent to the person whose email address appears on the originating requisition.

![Order Confirmation Email]

If you do not receive an order confirmation, check your junk email folder and filtering rules/options.

- **Login/Logout** – Do not use links appearing on the vendor’s website to login or logout. UTHSCSA users always access the vendor’s site from PeopleSoft Financials and return to PeopleSoft Financials upon checkout.
- **Timeout errors** – After 30 minutes of inactivity on the vendor’s site, if you attempt to continue with your order on the McKesson website, the following page will display.
• **Can I create a list of favorites?** Yes, any UTHSCSA user who can punch out to McKesson can create a **Personal List**, although there are some caveats. All UTHSCSA users are basically seen as a single punchout user, so any UTHSCSA user can view, use, edit, and delete a Personal List that you create. Some UTHSCSA users are permitted to create another type of favorites list called a **Shared List**. These can be viewed and used, but not edited by other UTHSCSA users other than those with security to create Shared Lists.

![Personal and Shared Lists](image)

As a practical matter, if you create a Personal List, it’s a good idea to prefix your list with your username so that you can easily find it.

• **Can I save my shopping cart and come back to it later?** Yes. McKesson refers to this as **suspending** a cart. Click on your shopping cart and then click the Suspend button next to the Punchout button.

![Suspend and Punchout](image)

The next time you punch out to McKesson, click on the Home menu option to access Suspended Carts.

• **Are there any items that are restricted/blocked in the catalog?** Yes. The University’s HOP policy 6.6.2 requires that tax-free industrial alcohol (190 and/or 200 proof) must be purchased from General Stores to insure compliance with the Health Science Center’s federal permit to use tax-free
alcohol. Although the McKesson catalog includes industrial alcohol, it should not be purchased. If it is, it must be returned to the vendor.

In addition, McKesson may sometimes place restrictions on the purchase of some items. These items will be clearly marked in the catalog with the phrase “Item has a Purchasing Restriction”. This is a vendor-imposed restriction. It does not refer to the university’s Purchasing department.

If you add a vendor-restricted item to your cart, you will not be able to punchout back to PeopleSoft until you remove the restricted item from your cart.
Getting Help

- Contact DCATS at 210-567-7777 (option 5).
- Contact the Purchasing Department at (210) 562-6200, or email purchadmin@uthscsa.edu.
- Consult the vendor’s online help. In particular, you might find McKesson’s Customer Tours to be of some assistance.

These are the available topics under Customer Tours. For UTHSCSA users, the first three are mostly applicable.

⚠ Some portions of the vendor’s online help topics do not apply to UTHSCSA punchout users. The vendor’s website supports both punchout users, as well as users from other organizations who must login to the vendor’s site. Most help topics include many extra steps that apply only to punchout users. Always ignore any portions of help topics that instruct you to log into (or out of) the vendor’s website, or to change passwords.