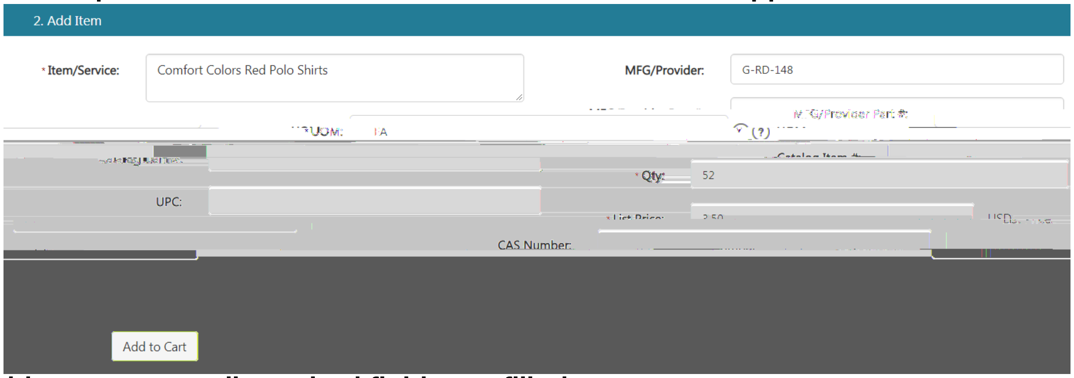
BuyUSI

Requestor Guide

Non-Catalog Transactions

All will print on the Purchase order that is sent to the supplier.



Click add to cart once all required fields are filled out

Continue the above steps for each line needed on your order-including freight.

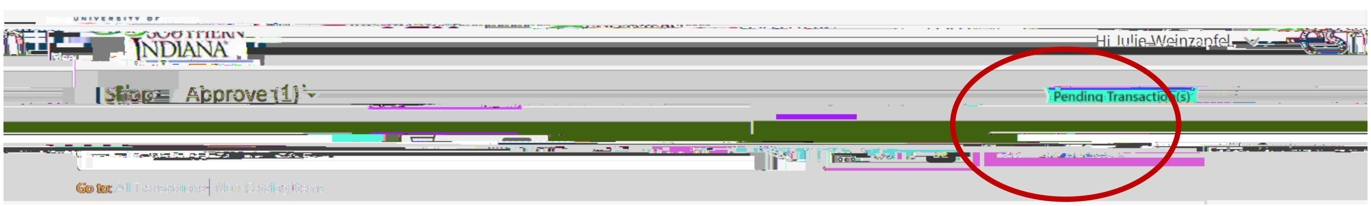
STEP FIVE:

Cart

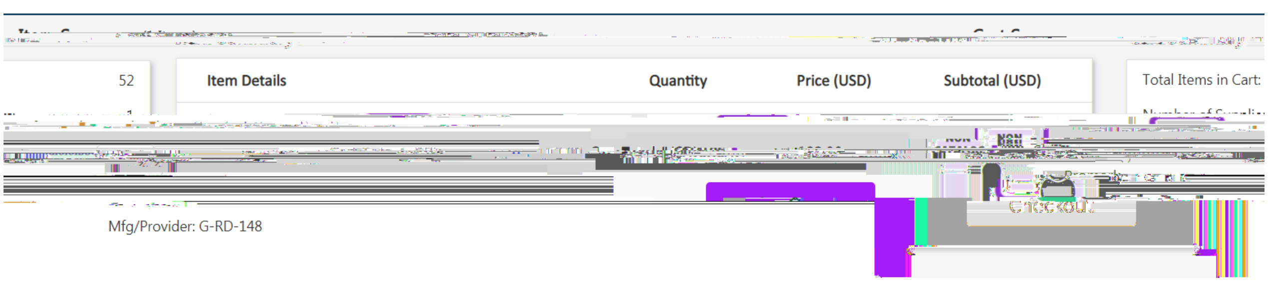
The cart icon shows how many items are currently in the requestor's cart.

Click the cart icon to view and check out

"Pending Transaction(s)" is the equivalent of "Checkout" in the previous interface



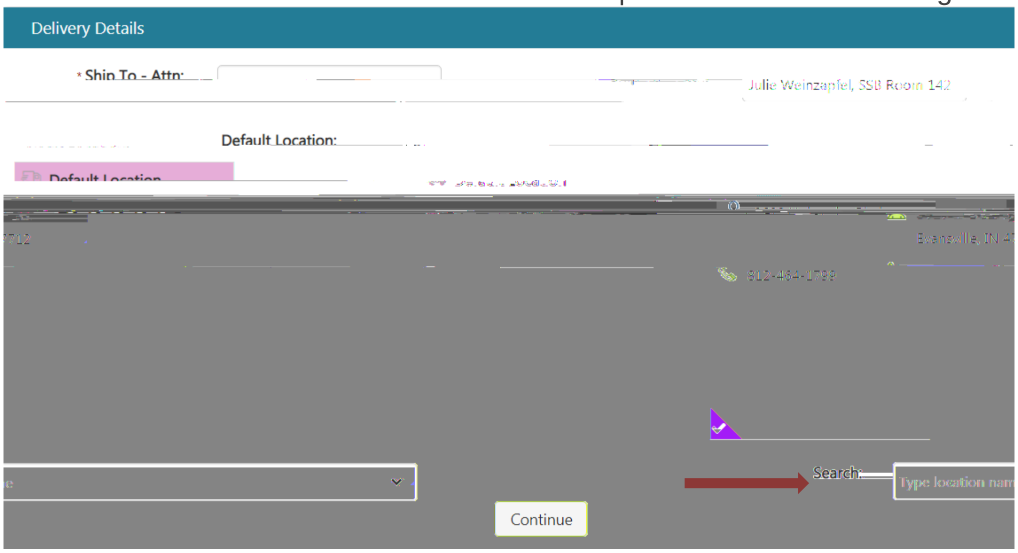
The Requester can edit the quantity or delete items.



Then, Convert Cart to transaction(s) by selecting Checkout.

2. Delivery Details

This is a default field. No additional action is required. Hit "Continue" to go to Billing Details

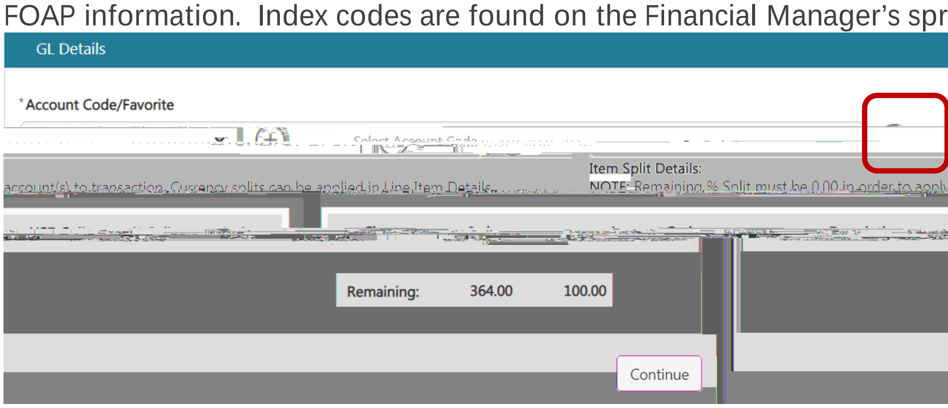


3. Billing Details

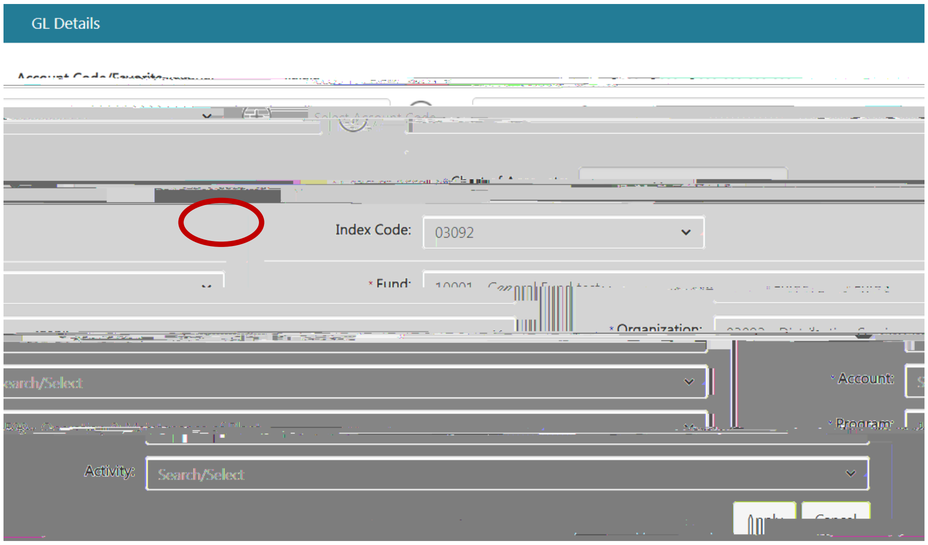
This is a default field. No additional action is required. Hit "Continue" to go to GL Details

4. GL Details

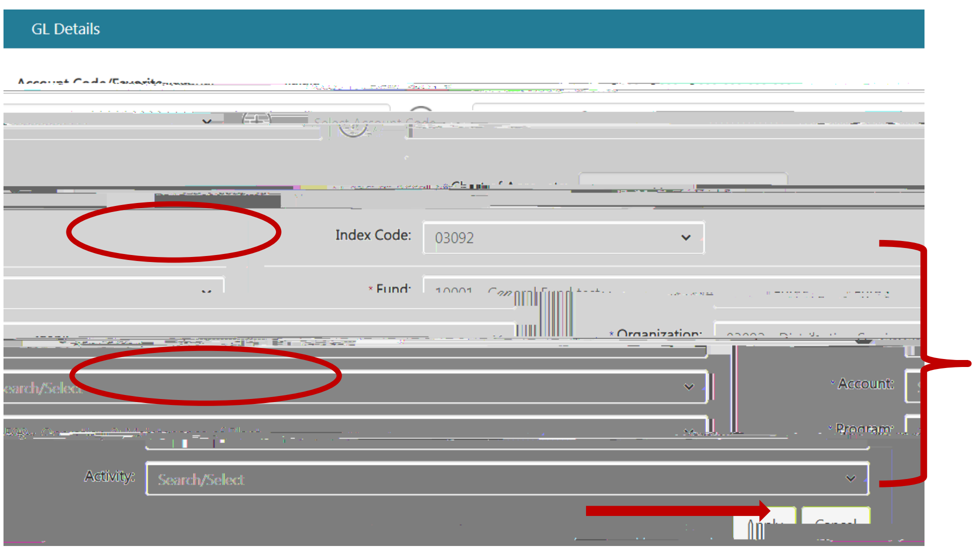
Click on the icon. This will open a new window allowing Requestors to use the Index code for FOAP information. Index codes are found on the Financial Manager's spreadsheet.



Requestors will enter the appropriate index code (use the Financial Manager's Spreadsheet to find the correct code per FOAP). The index code will populate the Fund, Org and Program code for the User.

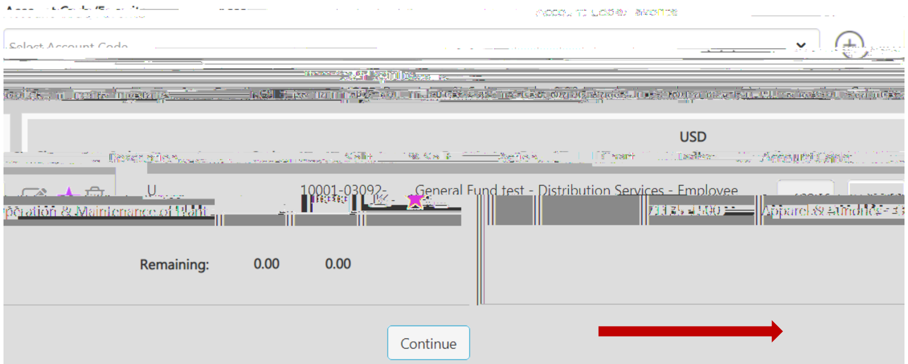


The account code will still need to be inserted based on the nature of the purchase. Users may utilize the Account Code Spreadsheet linked in the General Information panel on the left side of the shop page. Users should contact their Accountant for help with account codes. (Accountant contacts are listed on the Financial Manager's Spreadsheet).



Fund, Org and Program Codes Auto-Fill when the Index Code is used. Requestors will need to manually input the Account code.

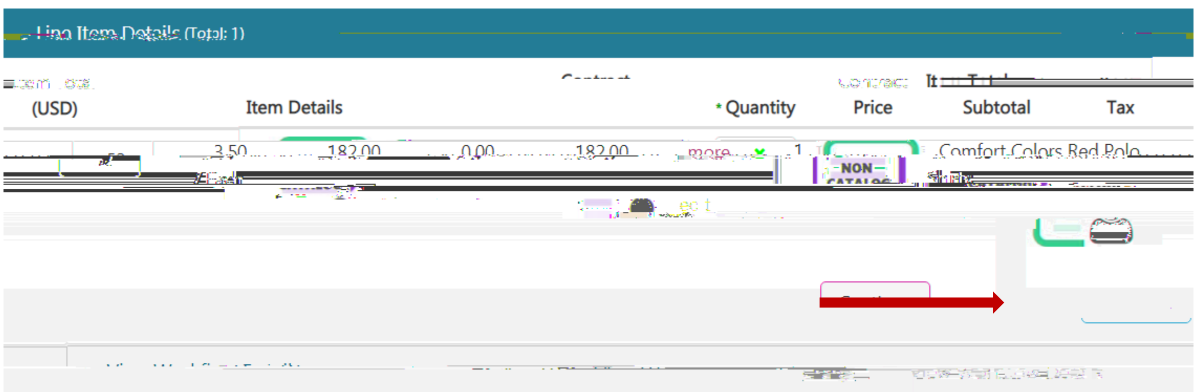
After the appropriate account code is entered hit “Apply” then continue.



This will take Requestors to the line item details screen:

5. Line Item Details

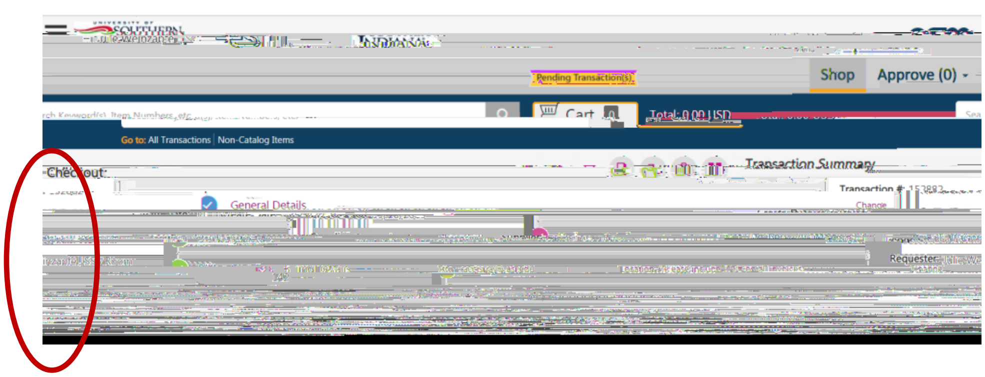
Requesters confirm the final line item details including quantity and Line-item level GL code (use the “more…” link).



Select Continue to confirm Line Item Details.
Complete each portion of the Checkout sections to complete the order.

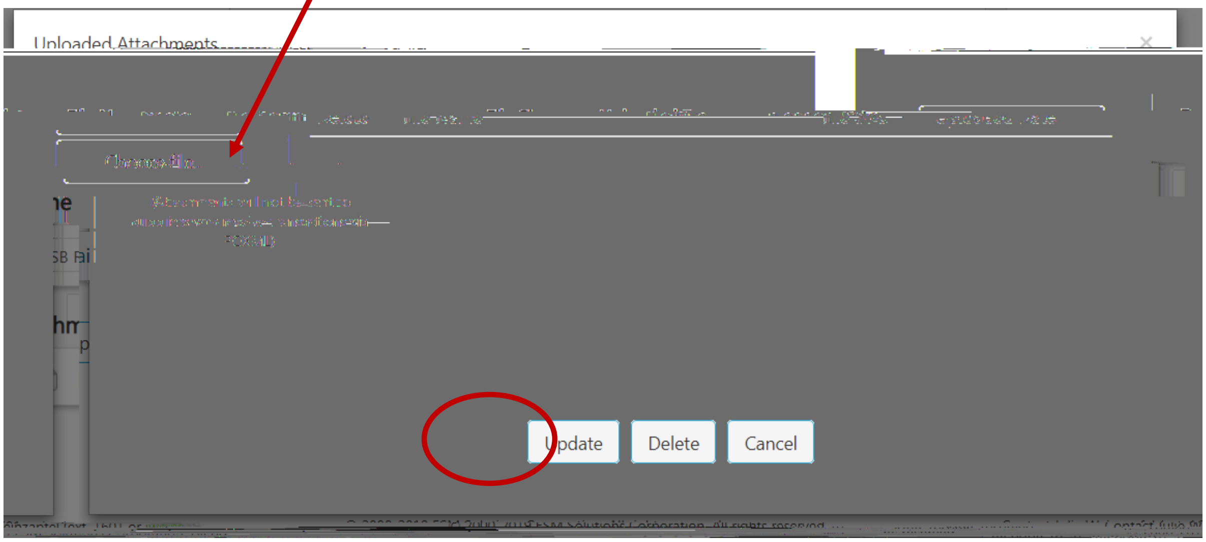
Select Continue to save/confirm information in each section.
The order can be Copied, Deleted, or put on Hold using the icons at the top of the Checkout Screen.

Each section will be marked with the green check mark icon upon completion.

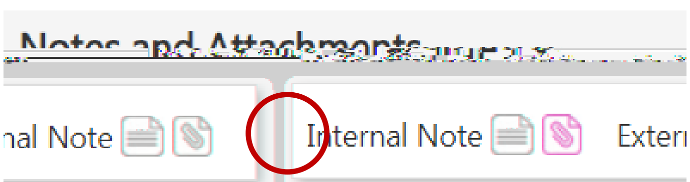


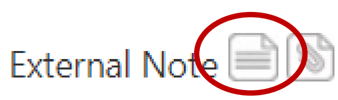
6. Notes and Attachments

At this time Requestors will download a copy of their quote or pricing documentation. To do so, click on the Internal Note icon [redacted] and select the paperclip to download the document(s). Choose the appropriate saved document. Once it pulls up, select update to save.



The paperclip icon will change from grayscale to blue, indicating that there is an attachment:



Next the user will click on the External note icon 

and chose the note option. This will open a window for text.

Notes should include any notations the vendor will need to process the order

Click on “Update” to save notations.

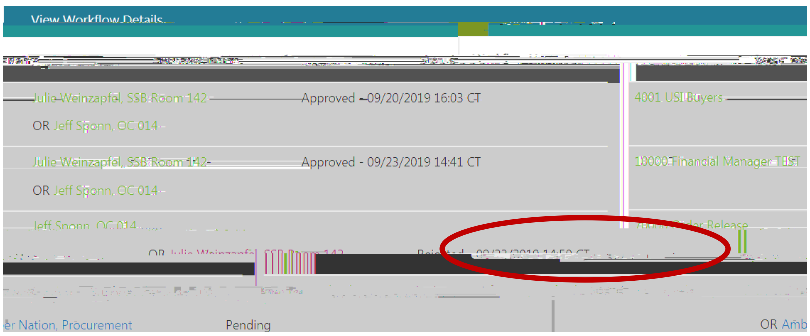
Viewing Workflows:

A date stamp and time will be applied after each approval.

"Active" Status means that the transaction is currently in that approval queue.

"Pending" Status means that the queue is next for approval once the queue above it has been approved.

If a transaction is rejected, that status is shown as well and remains until approval is granted.



Once all approvals have been obtained, Procurement will turn the transaction into a Purchase order.

A Banner purchase order number is generated for the order. Purchase order numbers begin with the letter "P".

Non-Catalog orders are emailed by Procurement to the vendor.

Catalog orders are sent electronically through the eProcurement system to the vendor.

The requester will receive an email notification when the release occurs.

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