Logging In
• Using the Purchasing home page click on the **USU EZBUY** link.
• On the left side of the **USU EZBUY** homepage, review **Bulletin Board** information for new announcements or training materials.

Reviewing Your Profile
1. Click the **profile** link located in the left corner of the page.
2. Click the **User Settings** tab. Review/edit Email Preferences.
3. Click the **Purchasing** tab. Review/edit Shipping Addresses and Index defaults. Some fields are view only and can only be updated from Banner.
4. Click the **Save** button.

Reviewing Action Items
• On the left side of the **USU EZBUY** homepage, review the **Action Items** (worklist) for updates regarding requisitions, purchase orders or invoices.

Action Items
- My Orders
  Requisitions
  Recently Completed (7)
  Purchase Orders
  Pending (2)
  Recently Completed (6)
+ View Approvals *
+ View Administrative Items

Shopping
• If you know the vendor, go directly to the vendor's punch-out site to search and shop.
• Use **USU Contracts** to search for preferred suppliers at University-specific pricing.
• Use **USU Forms** to create shopping carts for non-catalog items, Standing Purchase Orders and other pre-configured forms.
• Use **Advanced Search** options to enter specific criteria including Product Description, Part Number, Supplier and/or Manufacturer Name and Key Word search.
• Use **Go To** options to search from **Favorites**, move to the **Forms Page**, create a **Non-Catalog Form** order or create a **Quick Order**.
• Use **Browse** options to search for a **Supplier** or products by **Category**.

Creating Shopping Carts
Give Shopping cart a unique name
1. While searching, add items to your shopping cart from the search results via the **Add to Cart** button.
2. To access the shopping cart after adding a line item, select the *1 item(s) added, view cart* link or the icon (upper right corner of screen).
3. Click the **USU EZBUY** logo or **home/shop** tab to continue shopping.

Using USU Forms
1. From the **USU Form**s section, select the appropriate **form**.
2. **Enter** all required information (indicated in bold).
3. Select **Add and go to Cart** from the drop down menu.
4. Click the **Go** button to return to the shopping cart.
5. Follow *Assigning Shopping Carts* instructions.

Punch-out Shopping
Punch-out connects to the supplier's website, branded for and using University contract pricing. A typical punch-out site retains the look and feel of the public website, however, the checkout will result in the products being returned to the USU EZBUY site and added to the active shopping cart. Follow the supplier's directions for submitting the items back to USU EZBUY as each suppliers site may differ. Product pricing and availability may vary between the public and University websites.
1. Click the **supplier's icon**. Select **punch-out** to begin the punch-out session.
2. **Search** in the supplier's catalog for items and **add** to supplier shopping cart.
3. **Confirm** order in supplier's site in order to return item(s) to USU EZBUY shopping cart.
4. Follow *Assigning Shopping Carts* instructions.

Creating Favorites
home/shop | favorites | forms | carts

Add routinely ordered items to a favorite's folder for quick re-ordering.
1. **Search** for items using Punch-Out catalogs or Forms
2. Add items to cart. Select Add to Favorites; edit the Item Nickname (if needed). The correct product name will display on the requisition and purchase order to the supplier
3. Select the **Destination Folder** or New button and click **Submit.** A message will appear noting the product has been added to the folder.
4. Click the **Close** button.

Adding Notes and Attachments
• Internal **Notes and Attachments** and **External Notes and Attachments** may be added to the requisition prior to submission.
• All attached documentation will remain with the requisition and purchase order indefinitely.
• Documentation is visible to all approvers of the requisition.
• Some suppliers have the ability to accept external notes and attachments with a purchase order. These are typically suppliers who are receiving the purchase order via fax or email.
• Few electronically integrated suppliers have the ability to accept notes and attachments. Notifications will indicate if notes and attachments are accepted.
1. Click **carts** on the navigation bar to open the active cart.
2. Click the **requisition number** to open the requisition.
3. Click **Requisition Summary** tab.
4. Click the **add attachment**... link. Add file or URL. Click the **Save** button.

Updating and Editing Shopping Cart Items
1. After adding items to your shopping cart, select the appropriate line by checking line checkbox (☑).
2. Add to **favorites**, **remove items**, or **move items to a different cart** using the

`Perform an action on (1 items selected)... ▼` list.

Splitting Distributions Across Indexes
Shoppers can assign carts without completing this information
1. Click **carts** on the navigation bar to open the active cart.
2. Click the **Proceed to Checkout** button.
3. On the **Summary** tab, scroll down to the **Accounting Codes** section.
4. Click the line **edit** button. Click the **Add split** link.
5. Select **% of Qty** (or other) from drop down menu button. Enter the **split % amount**.
6. Enter the **Index** and **Account**. Click the **Save** button.
7. This may also be done by line item.

Adding Indexes, Shipping etc. [Proceed to Checkout]
Shoppers can assign shopping carts without completing this information.
1. Click **carts** on the navigation bar to open the active cart.
2. Click the **Add Index/Shipping/etc**. button. Missing information, such as Shipping Address, Indexes and Accounts will appear as an error at the top of the page. ⚠
3. Enter Shipping, Indexes and Accounts as needed. Click the **Save** button.
4. Review the requisition for accuracy and compliance. Click the **Submit into Workfow** button.

Assigning Shopping Carts [Assign Cart]
1. Click **carts** on the navigation bar to open the active cart.
2. Click the **Assign Cart** button. Select a **requester** and click the **Assign** button.
3. USU EZBUY sends an email notification of the assigned shopping cart to the requester.

Unassigning Shopping Carts
Assigned requisitions can be unassigned if you need to make changes to the shopping cart or if you need to change the requester.
1. Click **carts** ⇨ **draft carts** on the navigation bar.
2. Go to **My Drafts Assigned to Others** section and locate the requisition.
3. Click the **Unassign** button. The cart will be returned to your **Draft Carts** list.

Withdrawing Requisitions
Pending requisitions can be withdrawn from approval workflow.
1. Click **history/reports** on the navigation bar.
2. Click **requisition history** or **my requisitions** tab. Click the **requisition number**.
3. Click **PR Approvals** tab to view the requisition's status in approval workflow.
4. Select **Withdraw Entire Requisition** in the Available Actions drop-down menu.
5. Click the **Go** button. Enter the **reason** for withdrawal.
6. Click the **Withdraw Entire Requisition** button.

Viewing Approvals
You can check the approval status of a requisition on the **PR Approvals** tab of the requisition.
1. Click **history/reports** on the navigation bar.
2. Click the **my requisitions** or **requisition history** tab.
3. Click the **requisition number**. Click the **PR Approvals** tab to view the approval status.
4. Click the **view approvers** link to view the responsible approvers.

Creating and Distributing Purchase Orders
• Upon completion of the approval process, the **Purchase Order Number** is generated and the purchase order is automatically distributed to the supplier via the supplier's preferred method.
• Some forms will <u>not</u> dispatch an order to the supplier, such as the After the Fact and Payment Voucher forms.
• Suppliers are provided with the requester's contact information, as entered in **profile**, and will contact the requester directly with questions or concerns.

Receiving [Create Qty Receipt]
Some purchase orders will require receipt to indicate invoice payment approval. An email notification is sent when a receipt is necessary.
1. Locate the purchase order from **my purchase order** or **PO history** tabs.
2. Click the **PO number**. Select **Create Qty Receipt**. Click the **Go** button.
3. Enter a unique **Receipt Name** (if needed).
4. Enter the **Packing Slip No**. and attach a scan of the packing slip (if needed).
5. Enter the received **Quantity**. For Standing Purchase Orders the Quantity field represents the dollar value or cost of the items or services being received.
6. Click the **Save** button. Click the **Close** button.

History

home/shop	favorites	forms	carts	approvals	**history**	settlement

PO History | PR History | my requisitions | my purchase orders | receipt history | invoice history | search exports

All requisitions and purchase orders are <u>permanently</u> stored within **USU EZBUY.**
1. Select **history/reports** on the navigation bar and select the appropriate tab.
2. Click the document number to view document summary, detail, and approval history.
3. To view payment information, go to the invoice **Summary** tab and view Pay Status.

Assigning and Ending Substitute Requesters
Carts already assigned to you will need to be completed or assigned to someone else.
1. Click **carts** ⇨ **draft carts** on the navigation bar.
2. Click on the **Assign Substitute** link and search for substitute. Select the appropriate user by clicking the **radio button** to the left of the user's name.
3. Click the **Choose Selected User** button.
4. Click the **End Substitute** link to end the substitution.

Consolidating Shopping Carts
When a requester consolidates shopping carts (from a shopper), the shopper loses visibility of the original shopping carts and receiving capabilities.
1. Click **carts** ⇨ **draft carts** on the navigation bar
2. Click on the name of a shopping cart (you want to combine) to make it your active cart.
3. Select the appropriate line(s) by checking line checkbox (☑) or **Select All** ☑.
4. Select **Move to Another Cart** from the dropdown menu.
5. Select **Move to new cart**. Click the **Move** button then click the **Close** button.
6. Repeat steps 1 through 4 and select the appropriate draft cart from the dropdown menu.