

## 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** (work list) for updates regarding requisitions, purchase orders or invoices.

## Shopping

- If you know the vendor, go directly to the vendor's punch-out site to search and shop.
- Use **USU Contracts** to search vendors with University-specific pricing.
- Use **USU Forms** to create shopping carts for non-catalog items, Standing Purchase Orders, Direct Pay's and other needs using 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

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 Forms** 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.

**Action Items**

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

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

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  button and click **Submit**. A message will appear noting the product has been added to the folder.
4. Click the **Close** button
5. Proceed to Check out or Assign Cart

## 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 **Shopping Cart Name** to open the requisition.
3. Click **Proceed to Checkout**.
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)...

### Splitting Index and Account Codes

Shoppers can assign shopping carts without completing this information

1. Click **cars** on the navigation bar to open the active cart
2. Click on **Proceed to Checkout**.
2. Under **Accounting Codes** click on the **Edit** button or view/edit by line item...
3. Click on **Add Split**.
4. Choose split by %of Price, %of Quantity, Amount of Price
5. Add amounts must equal 100% of total to proceed
6. Enter the **Index** and **Account**. Click the **Recalculate** and **Save** button.

Adding Indexes , Shipping etc.

Proceed to Checkout

Shoppers can assign shopping carts without completing this information.

1. Click **cars** 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.

Assigning Shopping Carts

Assign Cart

1. Click **cars** 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 **cars** ⇒ **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**.
4. Click the **PR Approvals** tab to view the approval status.
5. 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 not dispatch an order to the supplier, such as the After the Fact form.
- Suppliers are provided with the requesters 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. Your department will decide who does receiving.

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**. The default is the amount ordered, only change if different than received.
6. Click the **Save** button. Click the **Close** button.

### Requisition and Purchase Order History

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

All requisitions and purchase orders are permanently stored within **USU EZBUY**.

1. Select **history/reports** on the navigation bar to search for requisitions, purchase orders, invoices or receipts.
2. Select the appropriate tab: **PO history** | **requisition history** | **my requisitions** | **my purchase orders** | **receipt history** | **voucher history**
3. Click the Req or PO number to view document summary, detail, and approval history.

### Invoice History & Payment Information

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

All invoices are permanently stored within **USU EZBUY**.

1. Select **history/reports** on the navigation bar to search for invoices or vouchers.
2. Select the **invoice history** tab.
3. Search by **Invoice**, **by PO**, **by Supplier/SKU** or **by Contract**.
4. Click the **Search** button.
5. Click the **Invoice** number to view summary, detail, and approval history.