



BuyUSI Training Manual

Team Eagle



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What is BuyUSI?

BuyUSI is an on-line application that provides for a one-stop procure-to-pay system. The University has partnered with ESM Solutions' easyPurchase on-line application for its procurement needs. The University has branded this application "BuyUSI" and it is where USI shops! The application allows for creation of purchase requisitions through vendor catalogs and other order types, providing for a one-stop shopping experience. Once all approvals are in place within the system, the order is automatically transmitted to the vendor, and the purchase order is integrated with Banner.

Maximizing Site Performance Browsers

The preferred Internet browser for BuyUSI is Google Chrome. To download this browser, go to www.google.com, and type "Download Google Chrome". Select the link that says "Chrome Browser - Google". It will take you to the webpage where you can download Google Chrome.

BuyUSI may also be used with the following browsers:

- Internet Explorer
- Mozilla FireFox at current version
- Apple Safari at current version

Maximizing Site Performance: Email Notices

The BuyUSI system relies heavily on email notification to communicate issue regarding order approval notices, order rejection notices, etc.

To ensure you receive all these applicable emails, please do the following:

- Note that all emails will come from noreply@esmsolution.com
- Add noreply@esmsolutions.com to your contacts or address book
- View your email SPAM folder to verify none of the BuyUSI emails have inadvertently been delivered there.

Creating Orders: Overview

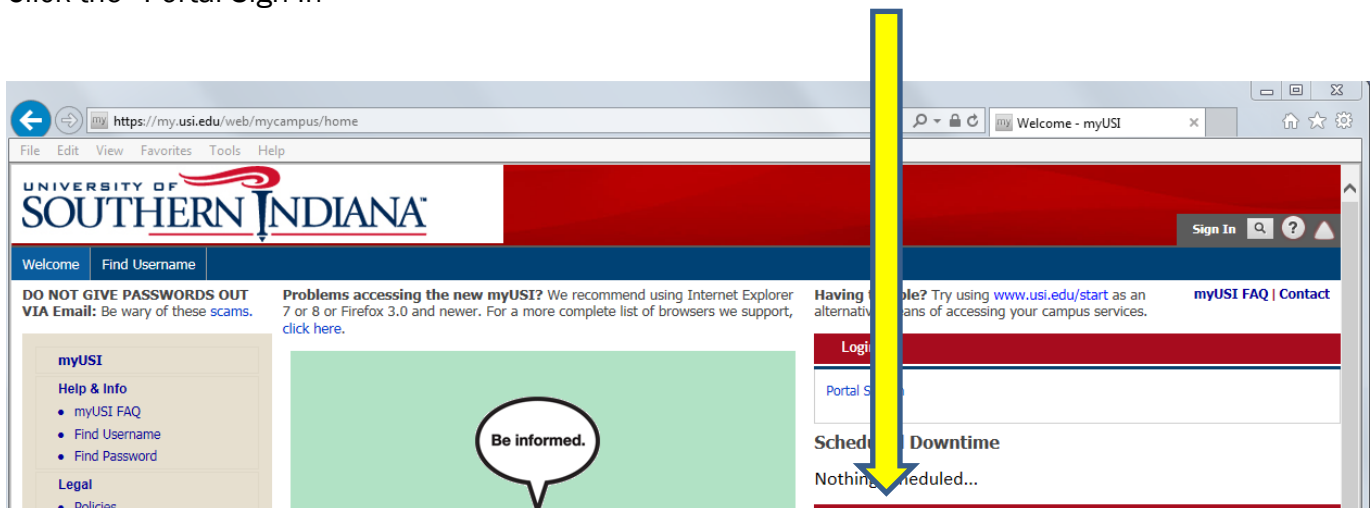
- Orders may be entered in BuyUSI from a desktop, laptop or iPad or smart phone
- Orders may be in one cart, regardless of vendor type (catalog/non-catalog/punch-out)
- Internet Browsers must be set to allow pop ups in BuyUSI
- Orders within BuyUSI fall into one of three main classifications:
 1. Catalog Punch-out: BuyUSI takes the user directly to the vendor's site Catalog. Supplier icon and link is displayed on the home page which connects to an on-line catalog
 2. Catalog Hosted: BuyUSI hosts (holds) a file of the vendor's items, prices and product information
 3. Non-Catalog: Vendor exists in Banner but not found as a catalog in BuyUSI

Creating Orders: Login

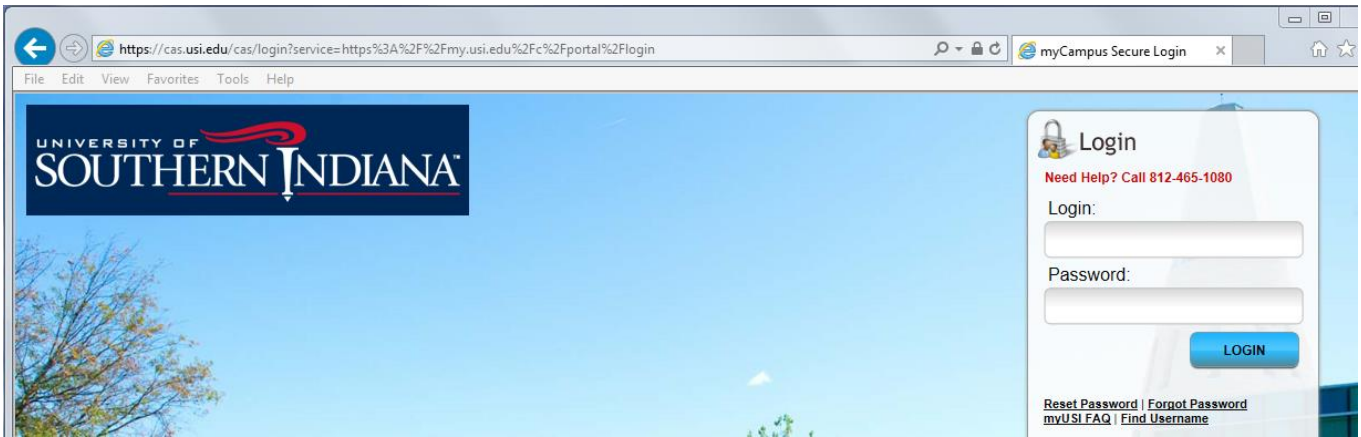
ACCESS BuyUSI:

Go to the MyUSI login page: <https://my.usi.edu/web/mycampus/home>

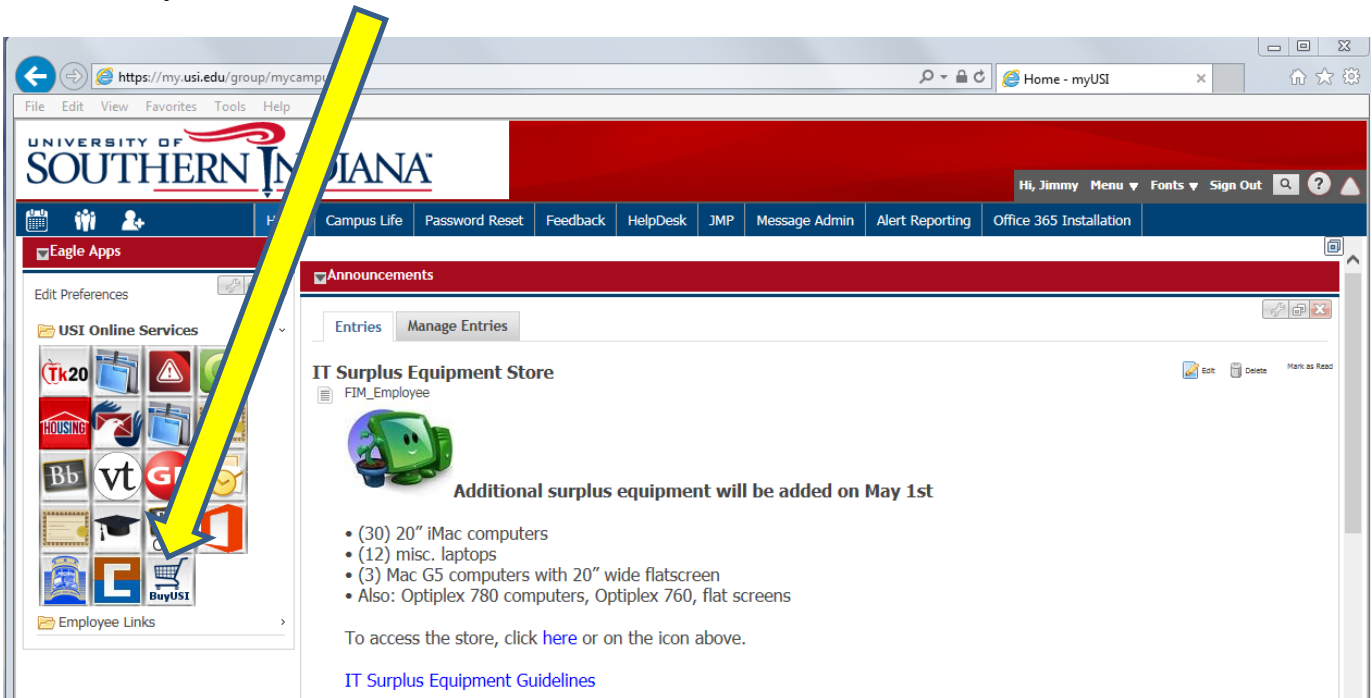
Click the "Portal Sign In"



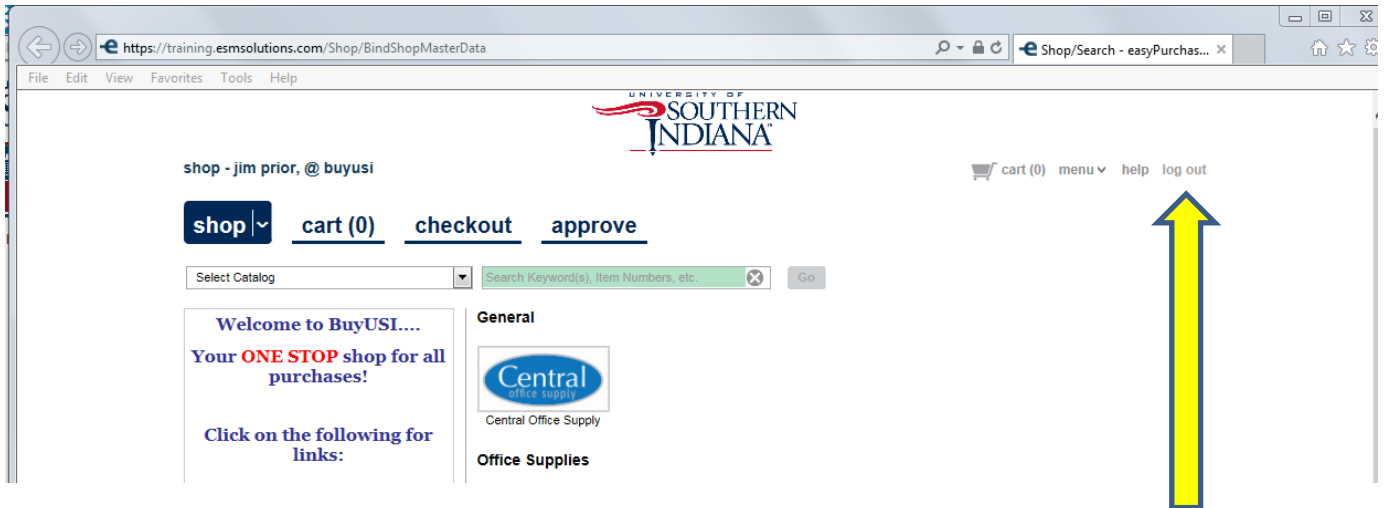
Enter network ID and password



Click the BuyUSI button



A separate window opens and you are in BuyUSI.

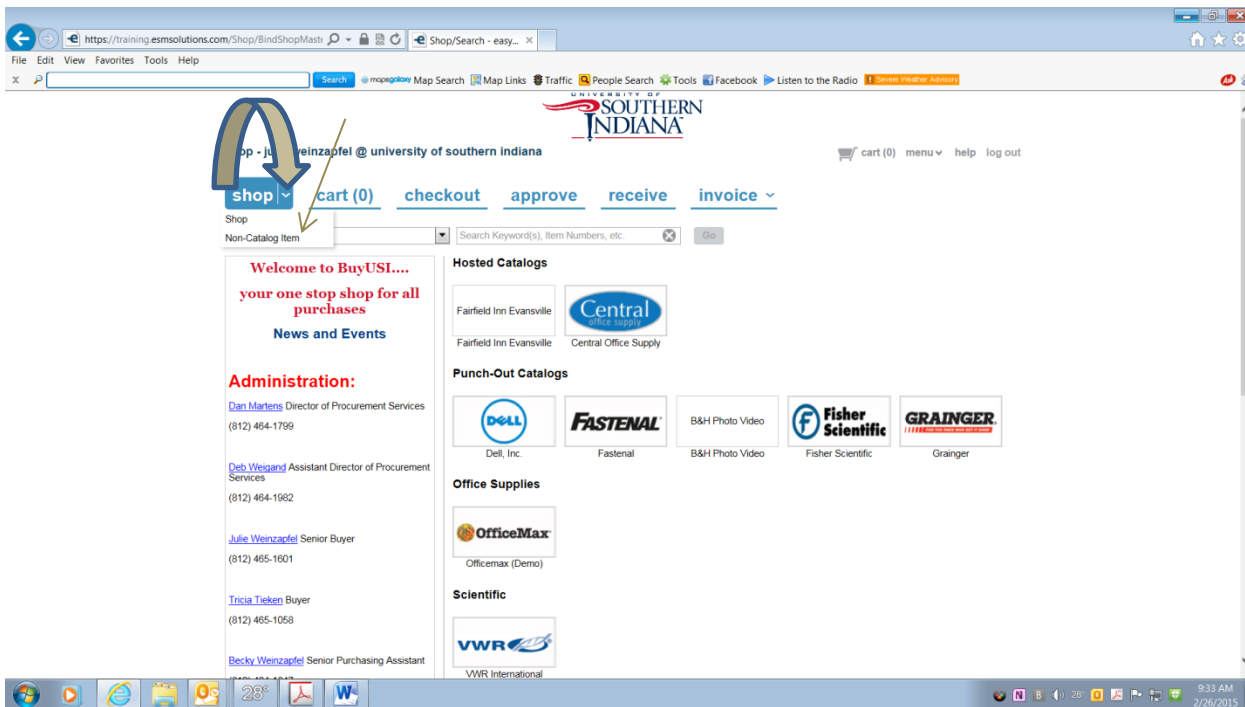


Note: When you click the Log Out in BuyUSI, you get a ESM logoff page. You can close that window and you are still in MyUSI.

Creating Orders: Non-Catalog

Non Catalog: A non-catalog order is an order issued to a vendor existing in Banner but not found as a catalog in BuyUSI

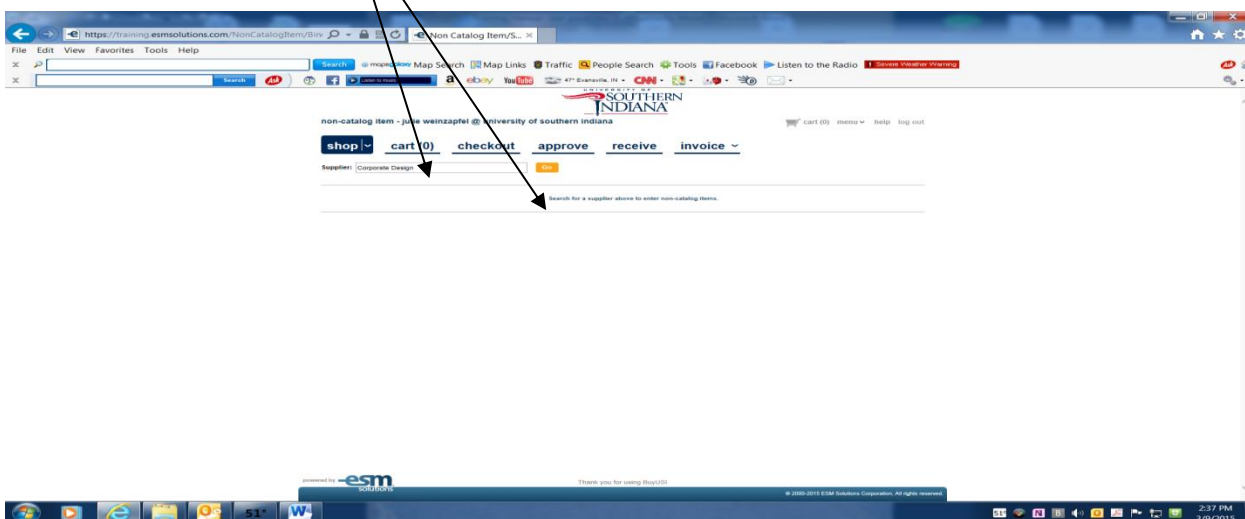
1. Go to Blue “shop” button on top left part of screen
2. Click drop down arrow on right of “shop” button
3. Select “Non-Catalog Item”



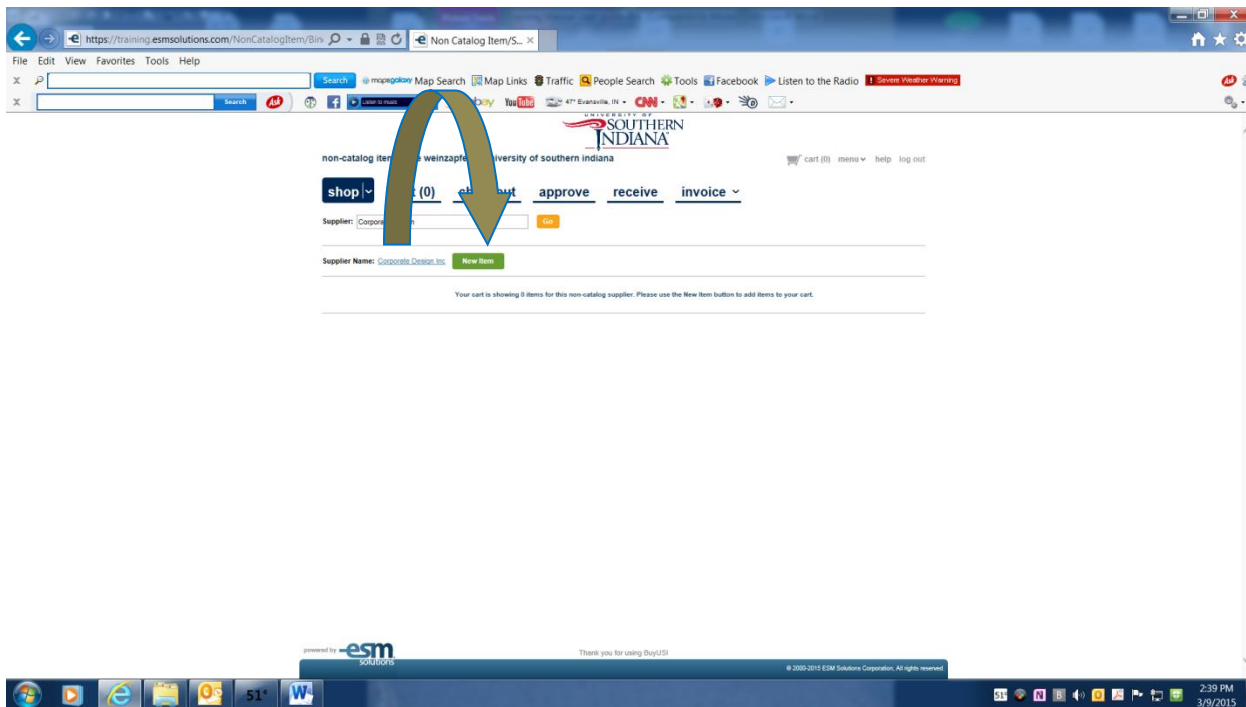
TIP: No wildcards are needed to complete a vendor search.

If vendor does not exist in BuyUSI, please contact the Procurement Services Help Desk at: 1058

4. At "Supplier" Box/field type in name of Vendor you wish to purchase from (Field is not case sensitive)
5. Enter or click "Go"



6. Click on name in Blue
7. Click on green "New Item" button



8. In the “Item/Service” field enter the title of the item being ordered. Enter or tab.
9. Unit of Measure (UOM) type in unit of measure (defaults to each). Enter or tab.
 - Units of measure supported by BuyUSI are:

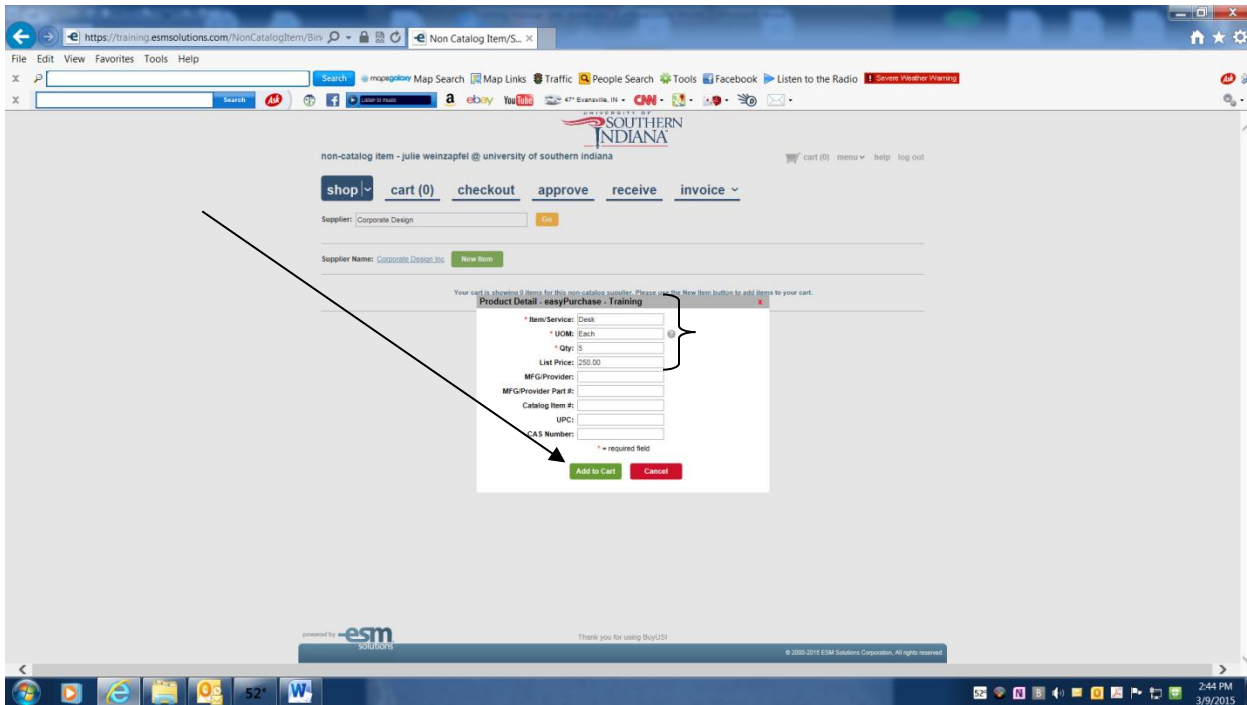
BDF	Board Feet
BL	Bale
Box	Box
BTL	Bottle
CAN	Can
CEN	Centimeter
CON	Container
CSE	Case
CTN	Carton
CUF	Cubic Feet
CUY	Cubic Yard
CWT	Hundred Weight
CYL	Cylinder
DOZ	Dozen
DRM	Drum
DYS	Days
EA	Each
FT	Foot
GAL	Gallon
GR	Gross
GRM	Gram
HR	Hour

INC	Inch
KG	Kilogram
KW	Kilowatt
LB	Pound
LNF	Linear Feet
LOT	Lot
LTR	Liter
M	Thousand
MET	Meter
MO	Month
N/A	Not applicable
OZ	Ounce
PAK	Package
PC	Piece
PK	Pack
PKT	Packet
PR	Pair
QT	Quart
QTR	Quarter
ROL	Roll
SET	Set
SHT	Sheet
SQF	Square Feet
SQY	Square Yard
SVC	Services
THR	Therms
TN	Ton
TON	Ton
TRP	Travel Related Services
WK	Week
WKS	Weeks
YD	Yard
YDS	Yards
YR	Year

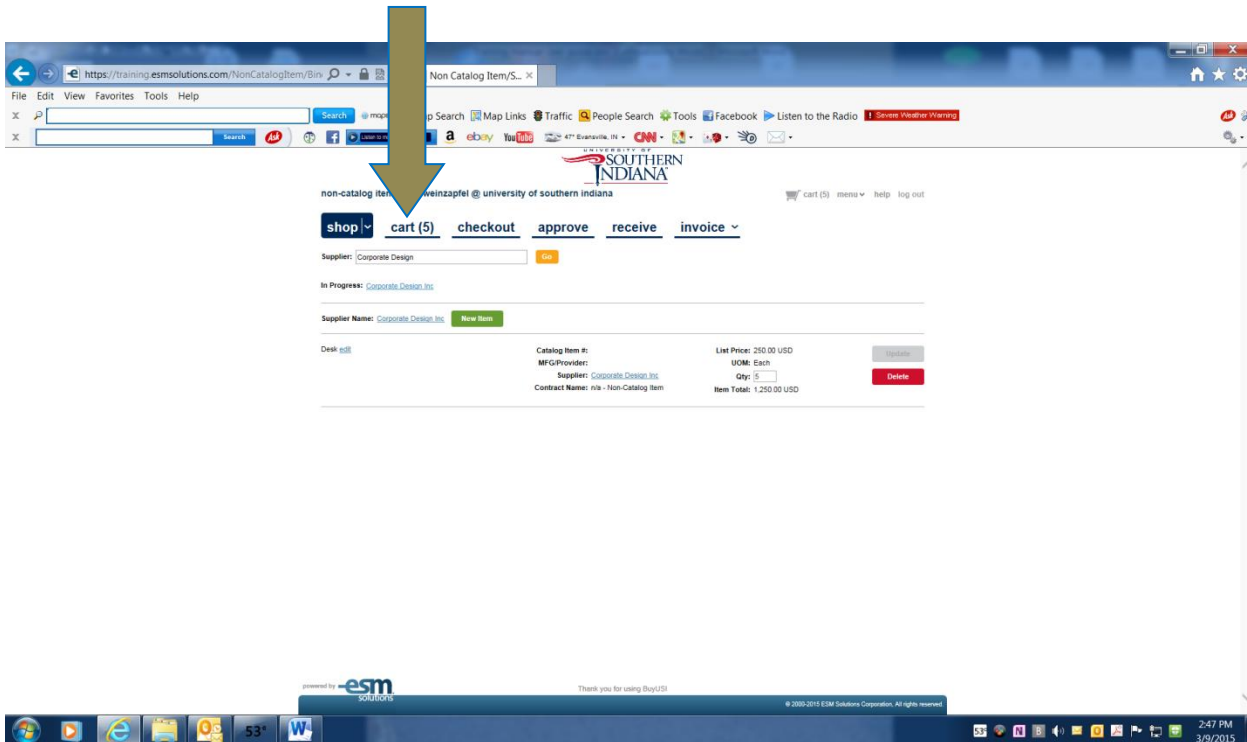
10. Entry Quantity desired. Enter or tab.

11. Enter price (do not use dollar (\$) symbol). Enter or tab.

12. Click "Add to cart".



The order is now shown in your cart at the main shop page:



****At this point, you may either add another item for this vendor by clicking “New Item”, order items from other vendors or catalogs, or place the order. To add more orders from other vendors, follow the instructions for the type of catalog order you are placing (hosted, punch out or non-catalog).**

If you want to check out, refer to the section entitled “Checking out: Convert Cart to Order”.

Creating Orders: Hosted and Punch-out Catalogs

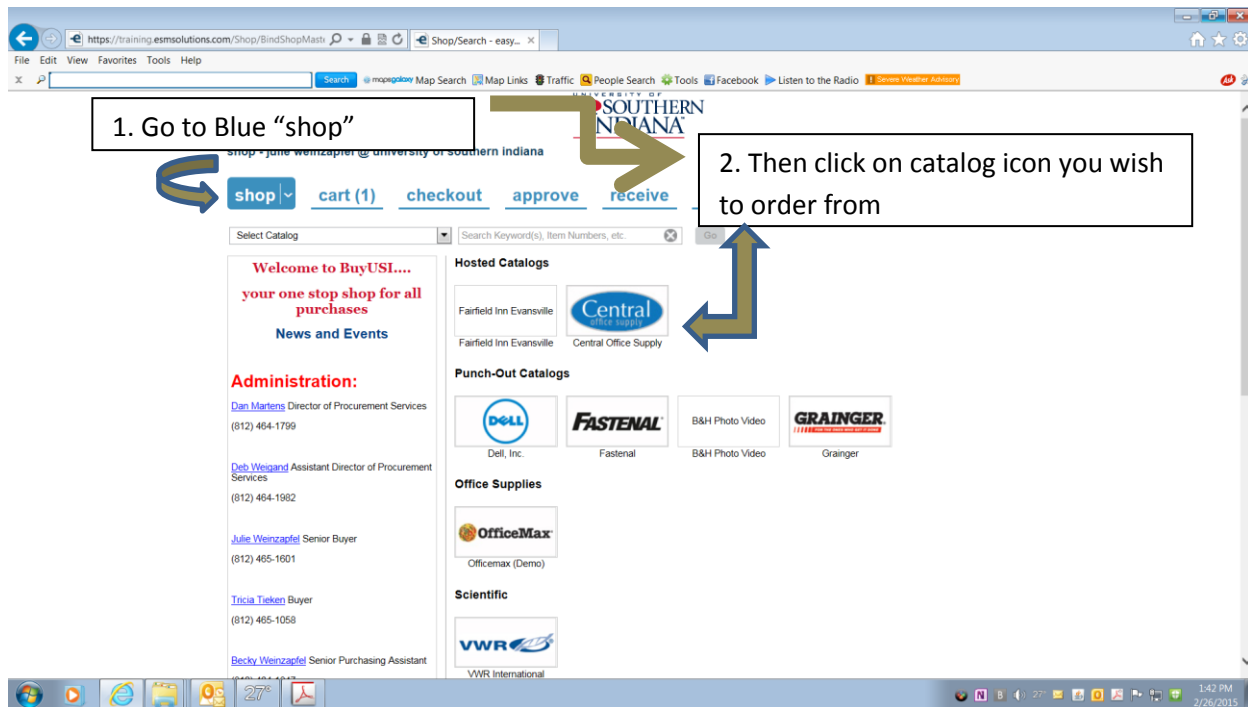
There are two types of catalog orders: Hosted and Punch-out. The icons for both are located on the main shopping page.

Hosted Catalog: Hosted catalog orders are where BuyUSI holds (hosts) a file of the vendor's items, prices, and product information. You do not actually go to the vendors' website.

Punch out Catalog: The order actually "punches out" to vendor's live website. Each site is vendor specific, therefore these directions are general. Each Website will vary.

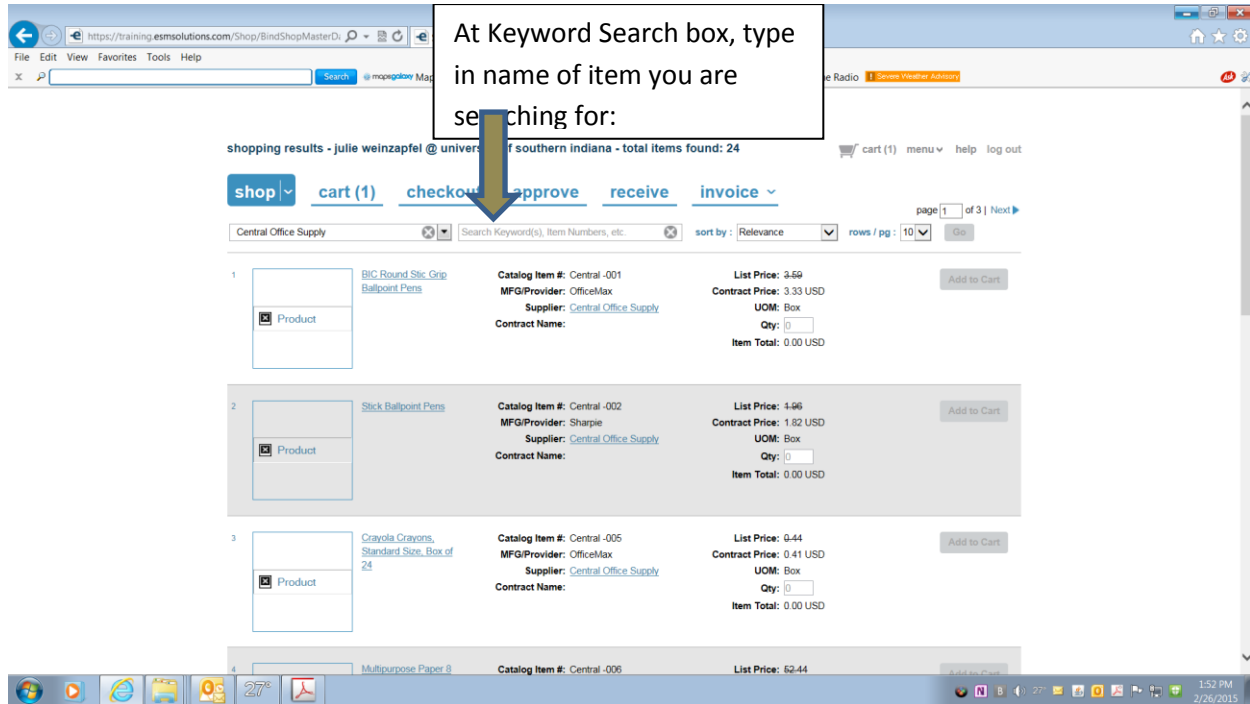
Begin by searching for products:

1. Click on Blue "Shop" button on top left part of screen
2. Click on the catalog icon (from main landing page-right) you wish to order from



3. At the “Keyword Search” field, located at the top of the screen, type in the name of the item you are searching for. (Not case sensitive).

4. Enter



5. Items will pull up.

6. Scroll through items

7. Select the item you want and click on product or quantity/enter.

**For punch out catalogs click on link to specialized areas and follow the individual website format for ordering. Once your selection is complete, you will be redirected to BuyUSI to finalize the order.

shopping results - julie weinzapfel @ university of southern indiana - total items found: 2

shop cart (1) checkout approve receive invoice

Central Office Supply stapler sort by: Relevance rows / pg: 10 Go

1 Full-Strip Stapler Value Pack Catalog Item #: Central -010 List Price: 9.62 Contract Price: 8.85 USD UOM: Pack Qty: 1 Add to Cart

2 Swingline 747 Classic Stapler, Satin Black Catalog Item #: Central -011 List Price: 9.62 Contract Price: 8.85 USD UOM: Pack Qty: 1

Type in item you are searching for
 All matches will pull up
 Select the one you want
 Update quantity
 Click green "add to cart" button

powered by esm solutions Thank you for using BuyUS! © 2000-2015 ESM Solutions Corporation. All rights reserved.

1:55 PM 2/26/2015

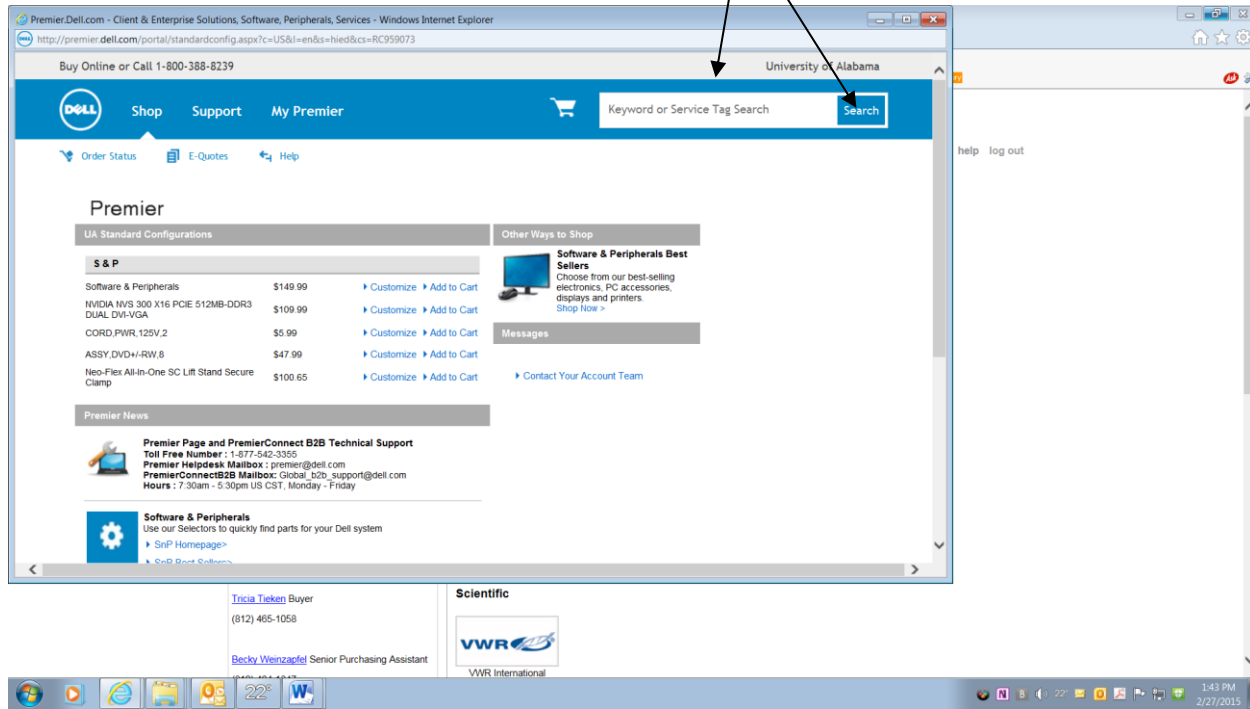
8. Click in quantity. (Defaults to one.) Update quantity. Enter.
9. Click green "Add to cart" button
10. Order is now shown in your cart at the main shop page

**At this point, you may either add another item for this vendor, by searching for another item, or place the order. To add more orders from other vendors, follow the instructions for the type of catalog order you are placing (hosted, punch out or non-catalog).

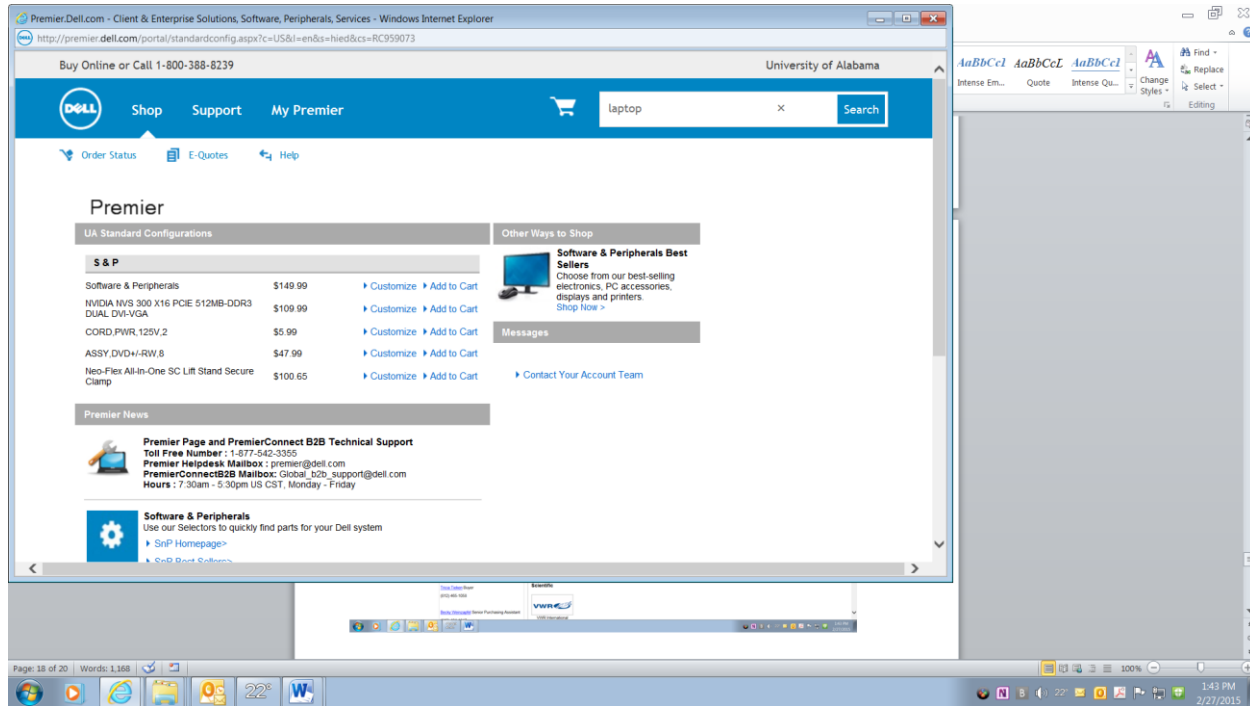
If you want to check out, refer to the section entitled "Checking out: Convert Cart to Order".

Creating Orders: Hosted and Punch-out Catalogs

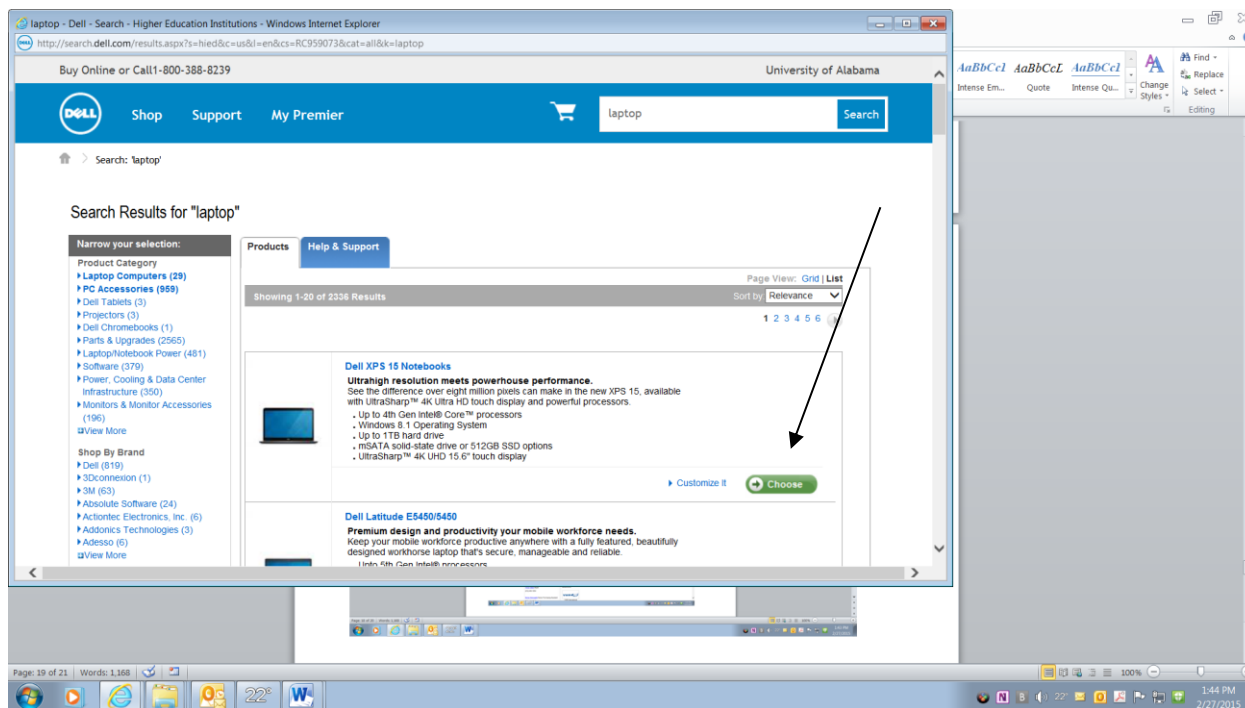
11. Find the search box for the specific website. Enter search criteria and follow prompts for specific website.



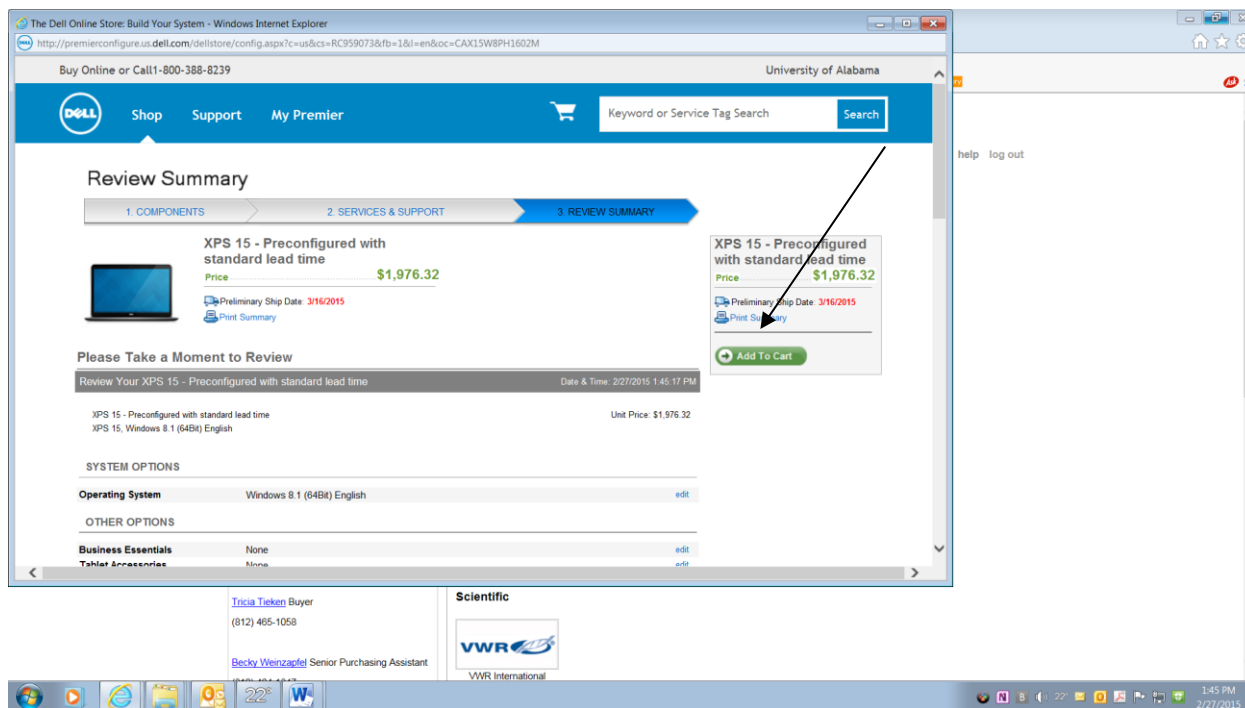
Results of the search appear here:



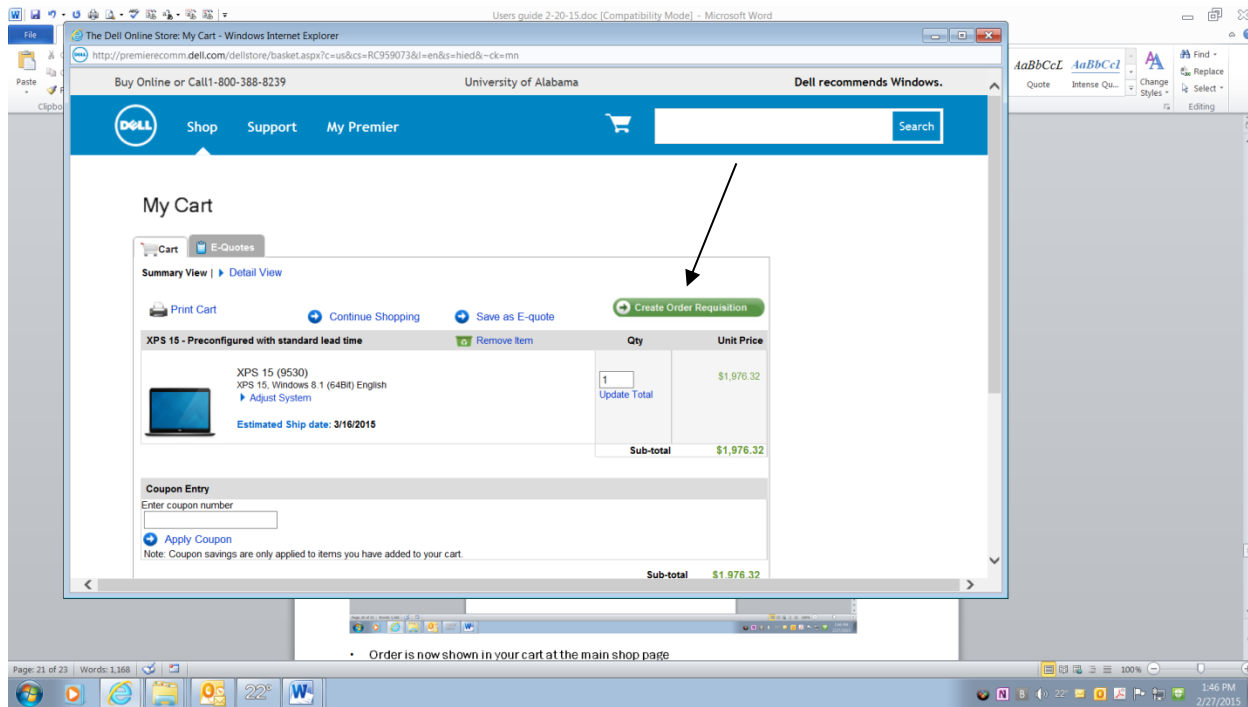
12. Items will pull up. Select the item(s) you want. Enter.



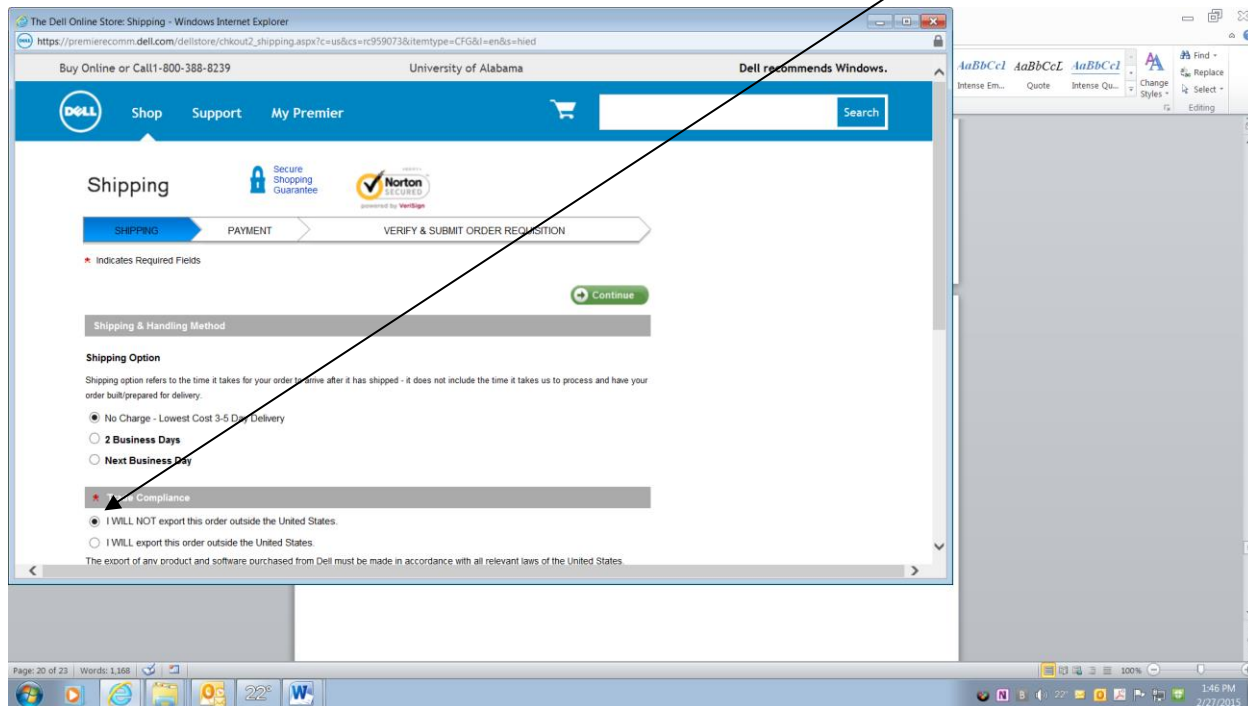
13. Follow the prompts for each specific punch-out Vendor website (again, vendor website specific)

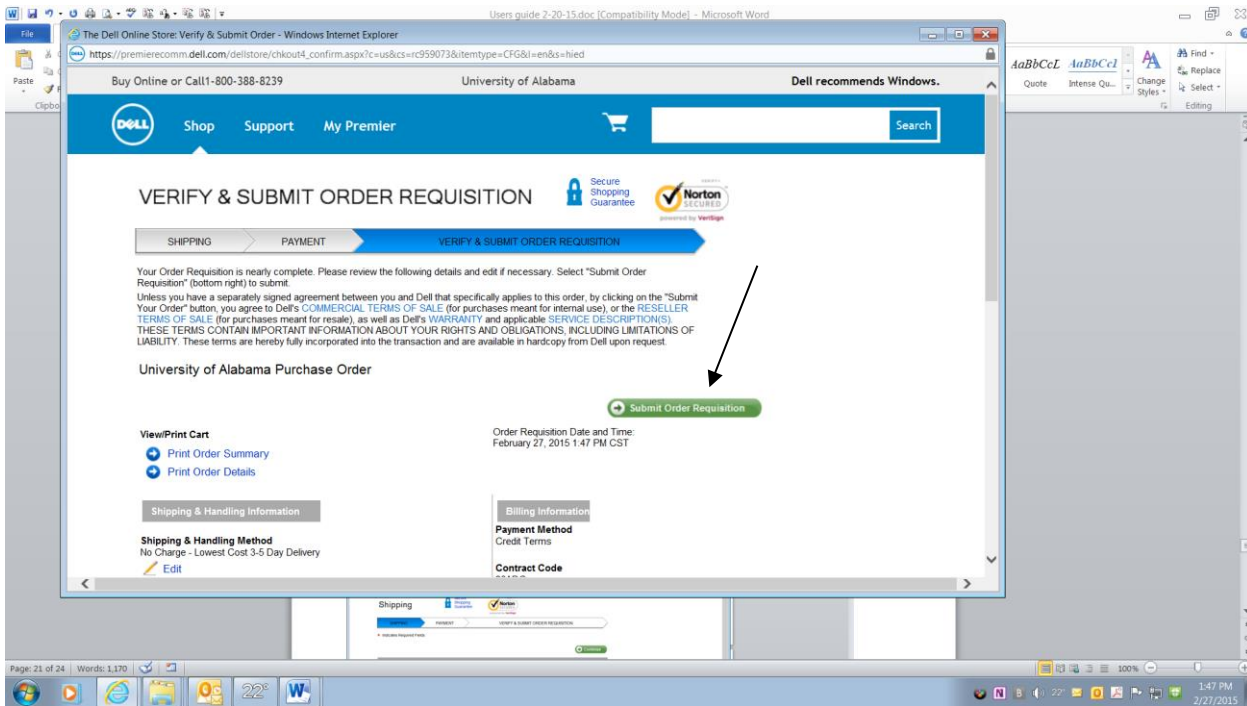


14. Finalize order and select the button on the specific website that allows you to load your cart and select

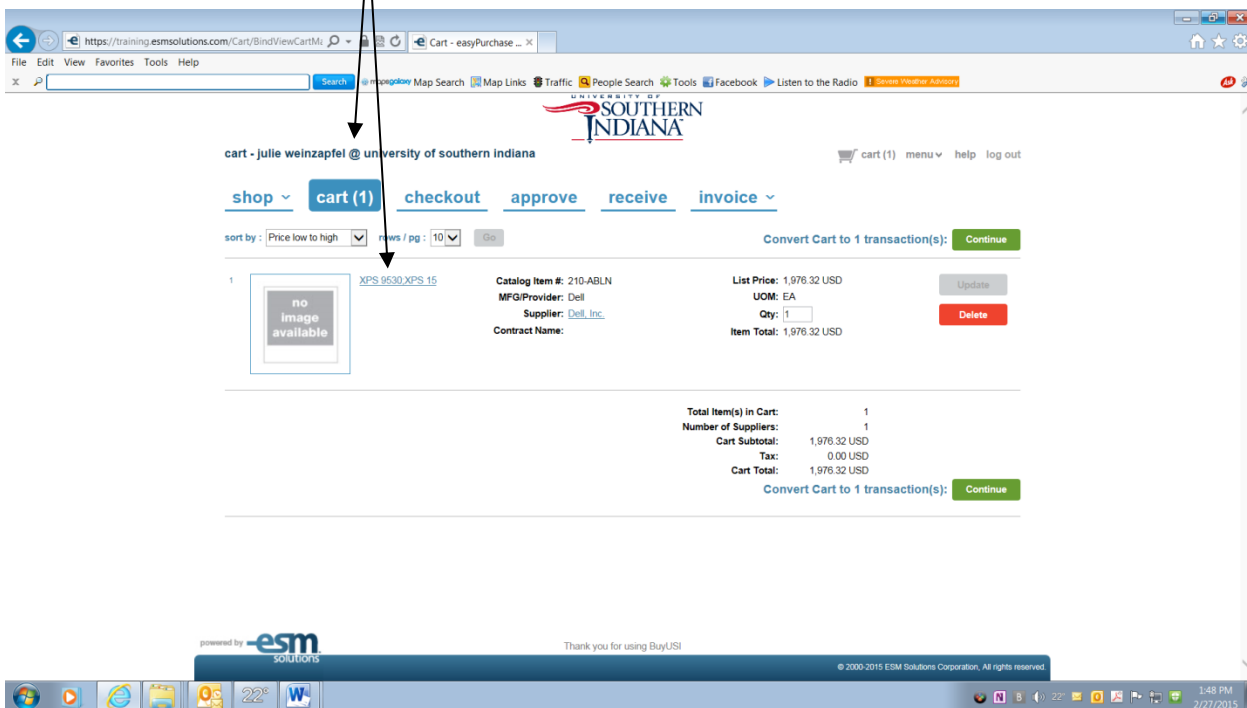


With Dell orders you must always check “I WILL NOT export...” in order to proceed with order





15. Order is now shown in your cart at the main shop page. If you click on cart, your order is now visible and ready to proceed.



****At this point, you may either add another item for this vendor, by searching for another item, or place the order. To add more orders from other vendors, follow the instructions for the type of catalog order you are placing (hosted, punch out or non-catalog).**

If you want to check out, refer to the section entitled “Checking out: Convert Cart to Order”.

Checking Out: Converting Cart to Order: Header-Entering FOAP(S)

Checkout is where the following actions are performed:

- View Header, commodity and footer information
 - Change order type if necessary
 - Edit the transaction name
 - Add attachments
 - Add internal and external notes
 - Add Description and Business Purpose
 - Update ship to and bill to information
 - Assign Banner Finance Fund, Organization, Account and Program (FOAP) codes
- Request Approval
- View Workflow

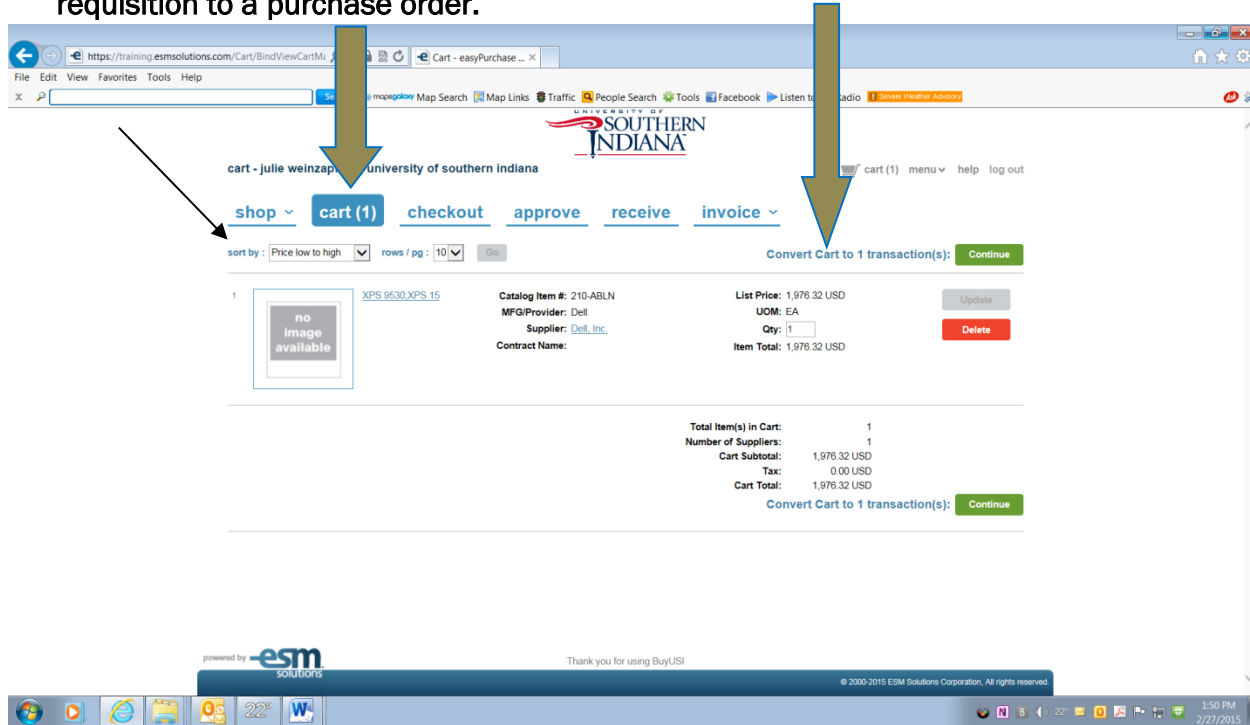
To checkout do the following:

1. Click the “CART” tab on the home screen at top. The “cart” tab is where you may review the items you have selected and change quantities if desired. You may use the “delete” button to remove an entire commodity line.

You may also return to “shop” from the cart if necessary. Additional items selected will be added to the current cart.

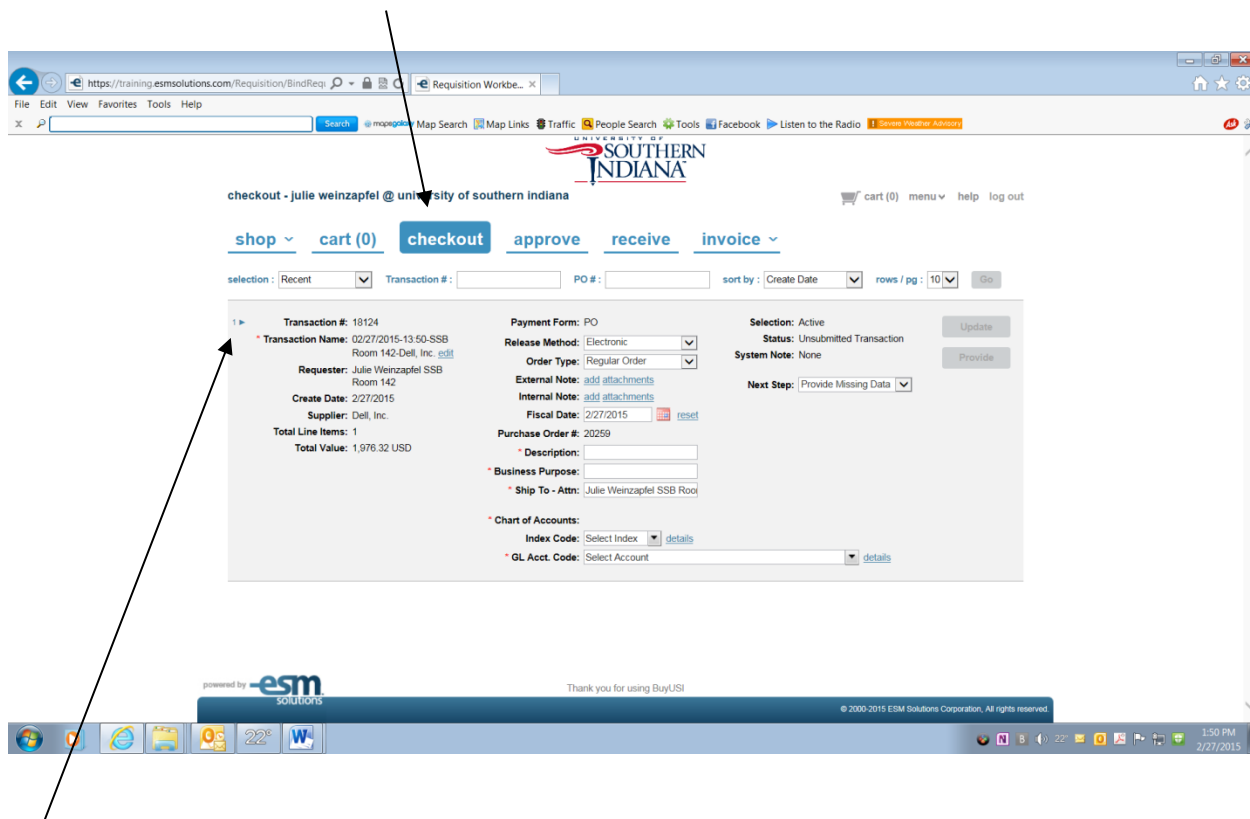
2. Select the desired “sort by” and click “go”
3. To the right you will see “Convert cart to ___ transaction(s)”. The number of transactions is equal to the number of vendors.

4. Click on green “Continue” button to convert the cart, which begins the process of converting the requisition to a purchase order.



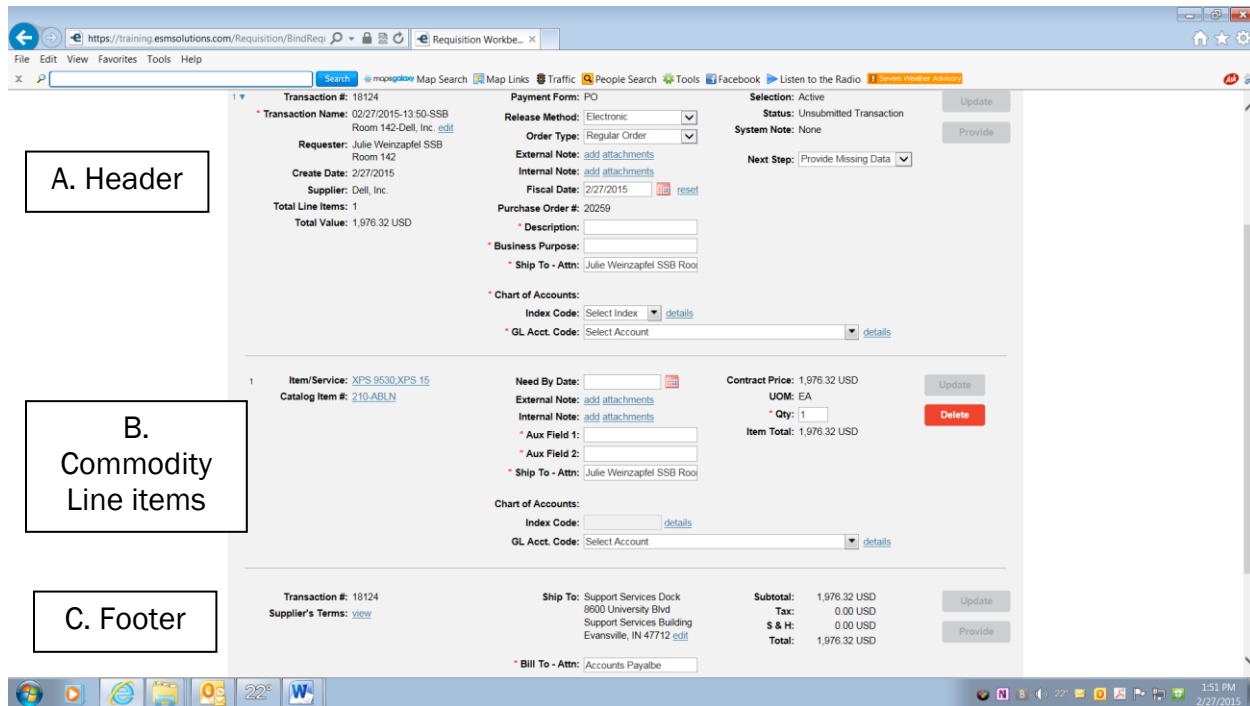
Once you have converted the “cart to transaction(s)” you are taken to the “checkout” tab where you see the items separated into requisitions (transactions) for each vendor.

Click on the “Check out” Tab



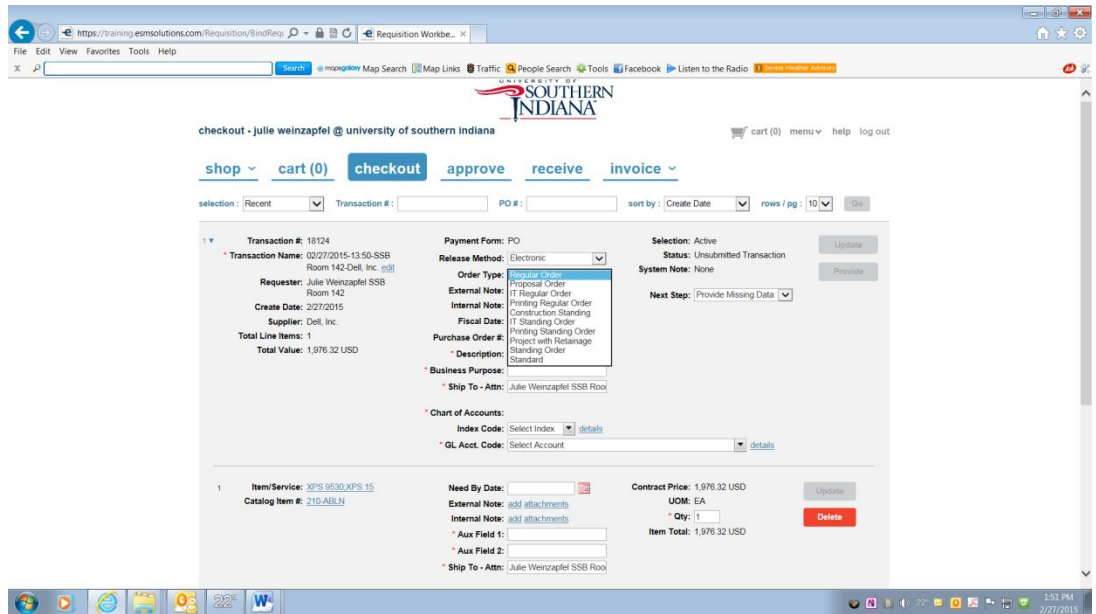
You will see your order(s) in number sequence to the left (1, 2, 3, etc.) with a small arrow to the right of each.

5. Go to the order you wish to release
6. Click on the small arrow next to the order number. This will expand the order into three sections:
 - A. Header
 - B. Commodity Line Items
 - C. Footer



A. Header:

- Change order type if necessary:
 - Go to the header section and find order type.



- Defaults to “Regular Order”.
- Use drop down arrow to see all order types and to update as applicable.

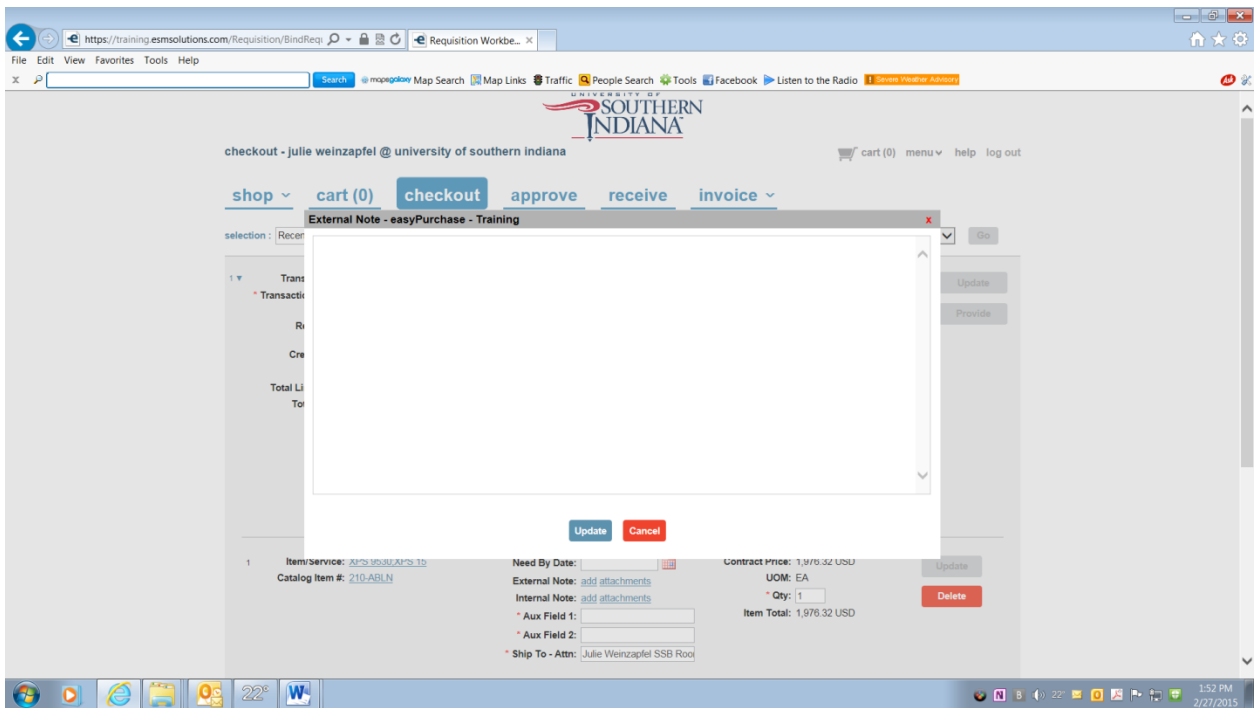
The following order types are supported in BuyUSI:

Regular Order	Standard Purchase over \$500 both catalog or non-catalog
IT Regular Order	Hardware, Software, Licenses, Computer Maintenance, Software Maintenance
Printing Regular Order	Orders that involve artwork, printing, brochures, etc.
Standing Order	Orders that renew each year, Blanket orders that cover supplies or services
IT Standing Order	Software licenses
Physical Plant Standing \$5K	Projects costing up to \$5K
Physical Plant Standing \$10K	Project costing up to \$10K
Project with Retainage	Project where we hold a percentage of contract’s final payment until project completion
Project over \$150K	Project costing \$150K or more
Furniture Order	Any furniture order placed

- ❑ Add internal and external attachments and notes:
 1. External Notes and attachments: Vendor will see and print on the PO.
Examples would include special shipping instructions, license key information, etc.
 2. Internal Notes and Attachments: Vendor does not see. Example would include quotation notes, etc.

If the order is a resubmission following a rejection, the previous rejection reason will display in the internal notes.
Click “attachments” to add attachments associated with the order.
If notes already exist, a portion of the note would be visible on this screen and the link would say “edit”
If no notes exist, the link will say “add”. Click the “add” or “edit” link to include your own notes
If notes already exist, be careful not to overwrite them.
Click “Update” to add the notes or attachments

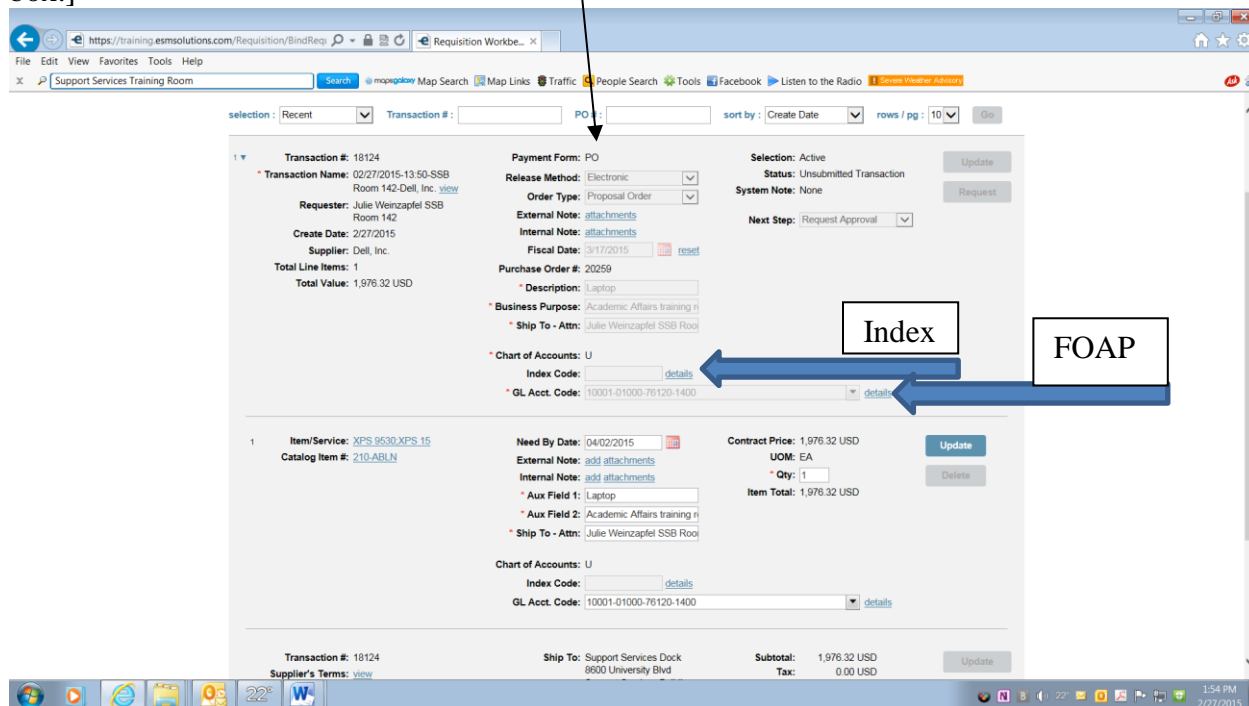
*Notes pop-up in a new window:



- ❑ Fiscal date: should pre-populate today’s date. This shouldn’t change unless the order is being entered in June for a July 1 date at end of fiscal year

You will see the PO # at this point. This is a system generated number.

.[Type a quote from the document or the summary of an interesting point. You can position the text box anywhere in the document. Use the Drawing Tools tab to change the formatting of the pull quote text box.]



- ❑ Description: Type in description of item you are ordering. If you have multiple items, you will do this for each item. (99 characters allowed)
- ❑ Business Purpose: type in business purpose for purchase. (why you are buying it. Example: T-shirts to give away at Springfest). Be as specific as possible. (The order may be rejected if the business purpose is not complete).
- ❑ GL Account Code: (Banner FOAP):
For entering the Banner FOAP information, you have two choices:

1. Select the “Details” link after the title “Index Code”

- The Index is a shortcut to create defaults for the three other codes Fund, Organization (Org), and Program (Prog).
- The index code is usually the same as your Fund OR Organization code, so it should already look familiar to you. (In Banner, the Program code defaults from the Fund or Organization code.) Refer to the Financial Manager’s listing as needed.
- If you use an Index code and the other three codes are populated, DO NOT change any of those three codes individually. i.e. Do not change the Program code because you think it should be another value.
- Note that the Program code is only four digits and all of the other codes are five digits. Do not add a leading zero to the Program code to make it 5 digits.

You will still need to populate the Account code. The account code should always be a type of expense and those codes always start with “7”.

2. Select the “Details” link after the “GL Acct Code”

- Populate the appropriate Fund,
- Populate the appropriate Org
- Populate the appropriate Account
- Populate the appropriate Program
- *refer to the Financial Manager’s listing for assistance as needed.

The system will validate for a proper combination of Fund, Organization, and Program codes as defined on the Financial Managers spreadsheet. Any invalid combination will cause an alert and prevent the order from being created.

The Chart code is not used because it is always “U” for University. “F” for Foundation is never used on a Purchase Order.

When using the drop-down list for any of the FOAP elements, note that only the first few values are shown. You can’t scroll down the list to see all of the codes. If you need a higher number, start typing the number and the drop-down list will jump to the codes that start with those digits. Once you choose a code from the list, notice the description that is displayed next to your code. Take a moment to verify that the description is correct so you know that you chose the right code number.

You may also perform a FOAP split on this screen:

- Click “update” to allow entry in the split detail section
- In the “%Split” field, 100% will default.
- Change this amount to the applicable percentage
- To add another FOAP select another Favorite or search for a FOAP

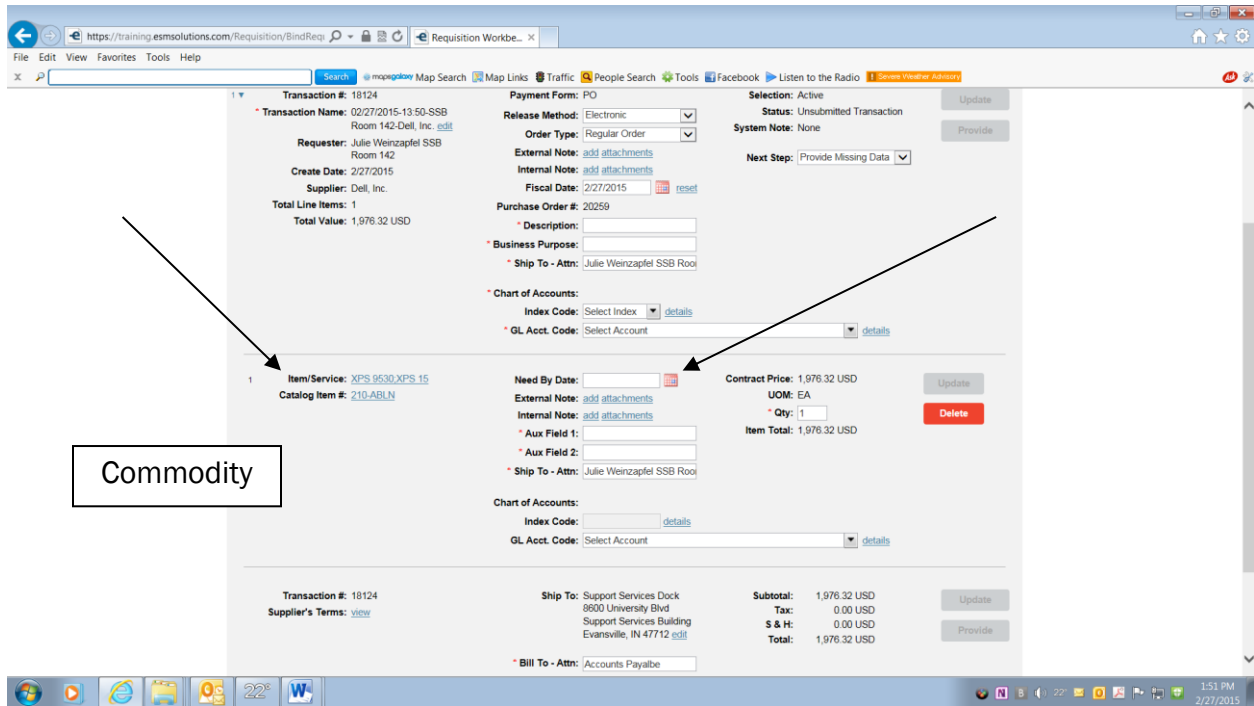
Once the FOAP information has been entered, click the following:

- Update
- Apply
- Update

B. Commodity Line Items: Item/Service section

- You can view item information by clicking on the Item/Service link
- Need by date: Use calendar to select need by date
- Ship-to Individual information
- Quantity
- You may perform a FOAP split by \$ on this screen

- Click “update” to allow entry in the split detail section
- In the “%Split” field, 100% will default.
- Change this amount to the applicable percentage
- To add another FOAP select another Favorite or search for a FOAP



C. Footer

- ❑ Update ship to and bill to information
 - The ship-to defaults to Support Service Dock (which is the main ship to for campus) If you need to have the order delivered to a different location, contact Procurement Services at Ext. 1058.
- ❑ Supplier terms.
- ❑ Review
- ❑ Validate
- ❑ Request Approval (Green button)
- ❑ View Workflow

https://training.esmsolutions.com/Requisition/BindReq... Requisition Workbe...

Transaction # 18124

Transaction Name: 02/27/2015-13:50-SSB
Room 142-Dell, Inc. [edit](#)

Requester: Julie Weinzapfel SSB
Room 142

Create Date: 2/27/2015

Supplier: Dell, Inc.

Total Line Items: 1
Total Value: 1,976.32 USD

Payment Form: PO

Release Method: Electronic

Order Type: Regular Order

External Note: [add attachments](#)

Internal Note: [add attachments](#)

Fiscal Date: 2/27/2015 [reset](#)

Purchase Order #: 20259

Description:

Business Purpose:

Ship To - Attn: Julie Weinzapfel SSB Roo

Chart of Accounts:

Index Code: [details](#)

GL Acct. Code: [details](#)

Selection: Active

Status: Unsubmitted Transaction

System Note: None

Next Step: Provide Missing Data

Update

Provide

1 Item/Service: XPS 9530 XPS 15
Catalog Item #: [210.ABLN](#)

Need By Date:

External Note: [add attachments](#)

Internal Note: [add attachments](#)

Aux Field 1:

Aux Field 2:

Ship To - Attn: Julie Weinzapfel SSB Roo

Contract Price: 1,976.32 USD

UOM: EA

Qty: 1

Item Total: 1,976.32 USD

Update

Delete

Chart of Accounts:

Index Code: [details](#)

GL Acct. Code: [details](#)

Ship To: Support Services Dock
8600 University Blvd
Support Services Building
Evansville, IN 47712 [edit](#)

Subtotal: 1,976.32 USD

Tax: 0.00 USD

S & H: 0.00 USD

Total: 1,976.32 USD

Update

Provide

Bill To - Attn: Accounts Payable

Transaction # 18124
Supplier's Terms: [view](#)

Footer

1:53 PM 2/27/2015

https://training.esmsolutions.com/Requisition/BindReq... Requisition Workbe...

Support Services Training Room

Transaction Validation Calculation is In-Progress.

INDIANA

checkout - julie weinzapfel @ university of southern indiana

cart (0) menu help log out

shop cart (0) checkout approve receive invoice

selection: Recent Transaction #: PO #: sort by: Create Date rows / pg: 10 / Do

1 Transaction # 18124

Transaction Name: 02/27/2015-13:50-SSB
Room 142-Dell, Inc. [edit](#)

Requester: Julie Weinzapfel SSB
Room 142

Create Date: 2/27/2015

Supplier: Dell, Inc.

Total Line Items: 1
Total Value: 1,976.32 USD

Payment Form: PO

Release Method: Electronic

Order Type: Proposal Order

External Note: [add attachments](#)

Internal Note: [add attachments](#)

Fiscal Date: 3/17/2015 [reset](#)

Purchase Order #: 20259

Description: Laptop

Business Purpose: Academic Affairs training r

Ship To - Attn: Julie Weinzapfel SSB Roo

Chart of Accounts: U

Index Code: [details](#)

GL Acct. Code: 10001-01000-76120-1400 [details](#)

Selection: Active

Status: Unsubmitted Transaction

System Note: None

Next Step: Request Approval

Update

Request

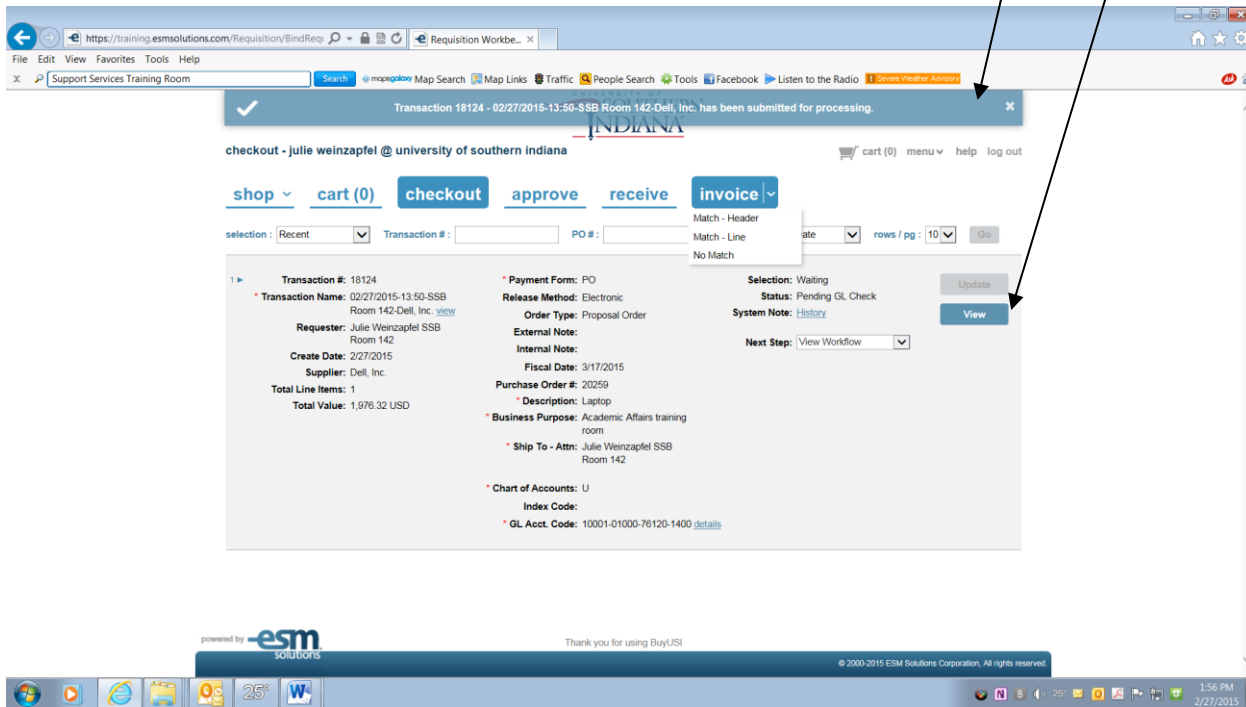
powered by esm solutions

Thank you for using BuyUSI

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1:53 PM 2/27/2015

You will get a message at the top of the screen telling you that the order went through. Also, the button to the left will change from green "request" to blue "view".



At this point you can view the workflow and progress of your order.

Viewing Workflow At Checkout:

Workflow is the approval path an order follows
Viewing the workflow may only be done from the Header of the order
Viewing the workflow is a not a requirement to creating an order.

To view workflow:

- In the "Next Step" field select "View Workflow". Click the "view" button once it is displayed

Transaction # : 18153
 Transaction Name: 03/02/2015-11:05-SSB
 Room 142-Fastenal
 Requester: Julie Weinzapfel SSB
 Room 142
 Create Date: 3/2/2015
 Supplier: Fastenal
 Total Line Items: 2
 Total Value: 4,484.73 USD

Payment Form: PO
 Release Method: Electronic
 Order Type: Regular Order
 External Note: please ship to teaching theatre
 Internal Note: 03/02/2015 19:55 UTC
 Fiscal Date: 2/27/2015
 Purchase Order #: 20265
 Description: Saw Blades
 Business Purpose: Art Exhibit
 Ship To - Attn: Julie Weinzapfel SSB
 Room 142

Selection: Waiting
 Status: Failed Encumbrance
 System Note: **Alert**
 Next Step: View Workflow

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Top to bottom is the consecutive flow of the approval path for the order:

Transaction # : 18153

Workflow Name	Priority	Nest	Approver/Manager Name	Status
40000 USI Buys	40000	1	Jeff Sporn_OC 014 OR Martens Dan, SSB 143	Approved - 03/02/2015 19:57 UTC
70000 Order Release	70000	2	Julie Weinzapfel SSB Room 142 OR Debbie Weigand SSB room 144 OR Tietjen Tricia, SSB	Approved - 03/02/2015 20:09 UTC

Refresh Close

Chart of Accounts: U
 Index Code:
 GL Acct. Code: 10001-03090-76220-1400 details

powered by **esm solutions** Thank you for using BuyUSI
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Approved-The date and time are shown by the name of the approver
 Active-the order is currently waiting in the queue for approval
 Pending-the order has not yet gone to the queue

Viewing Workflow

Once order is submitted:

- Login to BuyUSI
- At the “Selection” field, chose “Active” then click “Go”
- Click the blue “View” button to see the progress of the order

The screenshot shows a web browser window displaying the BuyUSI interface. The browser address bar shows the URL: <https://training.esmsolutions.com/Requisition/BindReq>. The page header includes the University of Southern Indiana logo and the user name: checkout - julie weinzapfel @ university of southern indiana. Below the header, there are navigation tabs: shop, cart (0), checkout (selected), approve, receive, and invoice. A dropdown menu for 'selection' is open, showing options: Recent, Active, Waiting, Hold, Archive, Submitted, Received, Ad Hoc, All Last 30 days, All Last 90 days, and All. The main content area displays details for a purchase order with Transaction # 3. Key information includes: Supplier: Fastenal, Create Date: 3/22/2015, Total Line Items: 2, Total Value: 4,484.73 USD. The order details section shows: Payment Form: PO, Release Method: Electronic, Order Type: Regular Order, External Note: please ship to teaching theatre, Internal Note: 03/02/2015 19:55 UTC, Fiscal Date: 2/27/2015, Purchase Order #: 20265, Description: Saw Blades, Business Purpose: Art Exhibit, Ship To - Attn: Julie Weinzapfel SSB Room 142, Chart of Accounts: U, Index Code, and GL Acct. Code: 10001-03090-76220-1400. On the right side, there is a 'Selection' field set to 'Waiting', a 'Status' field set to 'Failed Encumbrance', a 'System Note' with an 'Alert' icon, and a 'Next Step' dropdown set to 'View Workflow'. An 'Update' button and a blue 'View' button are also present. The footer of the page includes the ESM Solutions logo, a 'Thank you for using BuyUSI' message, and a copyright notice: © 2000-2015 ESM Solutions Corporation, All rights reserved. The Windows taskbar at the bottom shows the system clock as 12:20 PM on 3/3/2015.

Creating Orders: “Selection” Definitions:

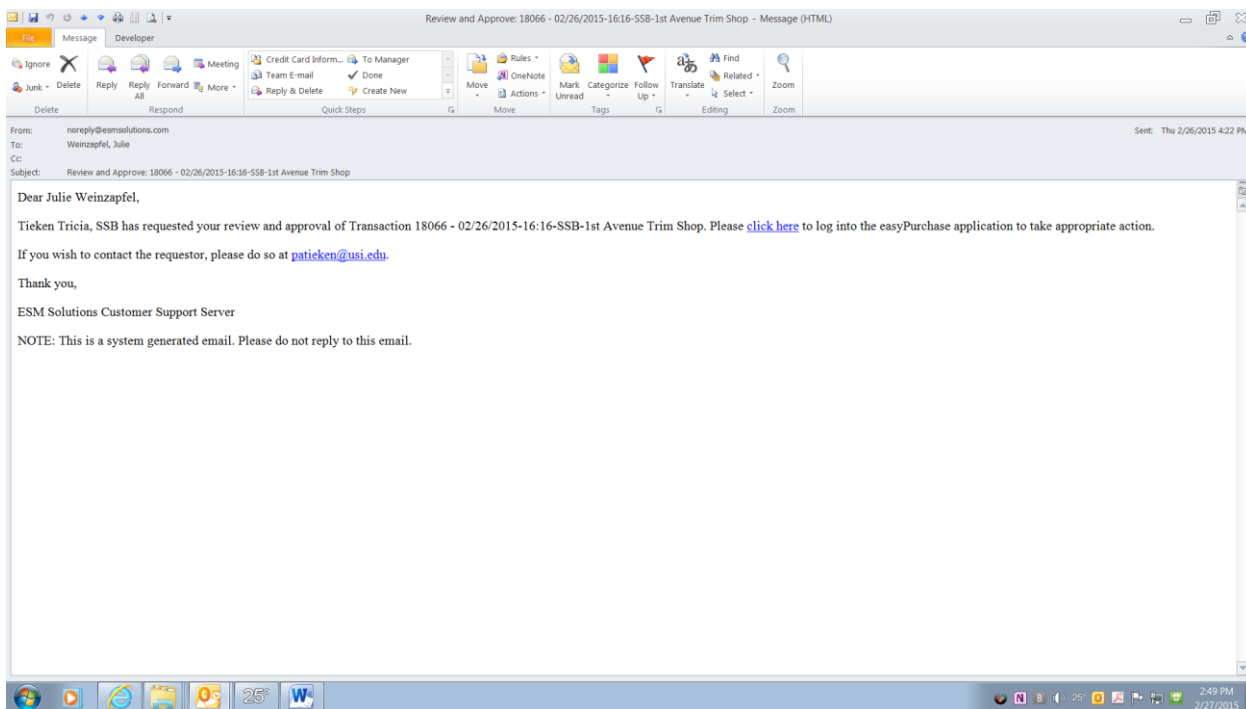
	Checkout Tab	Approve Tab
Recent	Transactions most recently converted from cart. If items are added to an open transaction, then older transactions may appear as recent	N/A
Active	Awaiting action from the user. I.e. FOAP splits, approval request, rejected orders, etc.	Awaiting Action from the user. I.e. approve/reject
Waiting	Transaction is awaiting action from another user. I.e. approval	N/A
Hold	N/A	Orders you have placed a “Hold” on and are awaiting your approval
Archive	Transactions the user has archived. These transactions may not be modified or processed. Archive cannot be undone. I.e. rejected orders that will not be processed further but the user wishes to keep them for future reference. Archiving will remove them from the User’s “Active” list.	N/A
Submitted	Order has been submitted to the Supplier	N/A
Ad Hoc	N/A	Orders which have routed to the user for an Ad Hoc approval.

Approving Orders: Overview

- Approvals may be performed from a desktop, laptop or iPad
- Internet Browsers must be set to allow pop ups in BuyUSI
- All orders will route through a predefined approval path known as “Workflow”
- If you have “E-mail Alerts” checked in your user profile, you will receive an e-mail when an order is awaiting your approval.

Approving Orders: E-mail Notification

- You will receive an e-mail notifying you that an order requires your approval.



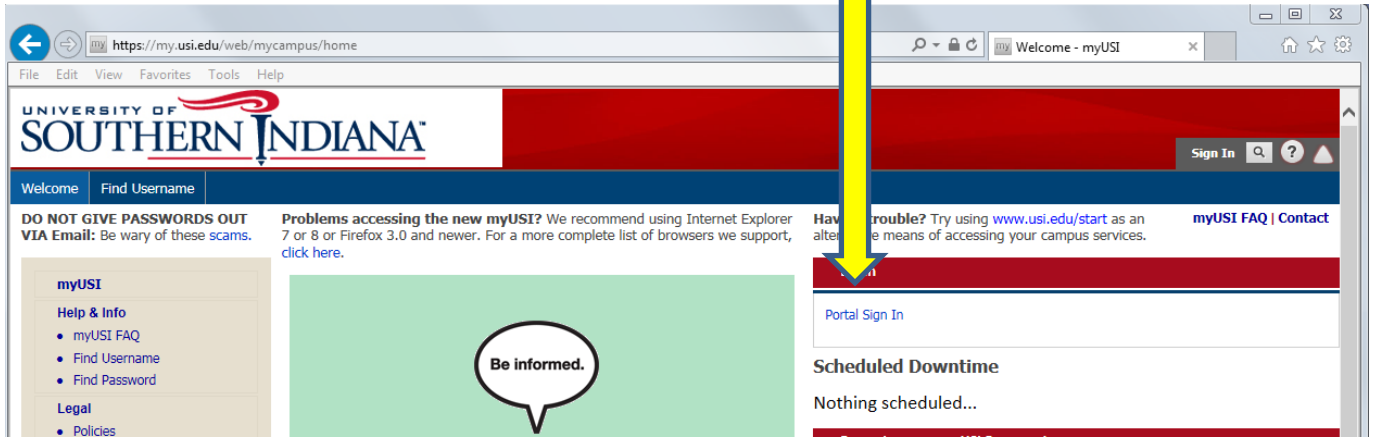
Approving Orders:

- Financial Manager will receive an email from the system notifying them they have an order or orders to approve. Follow the link in the e-mail or Access BuyUSI:

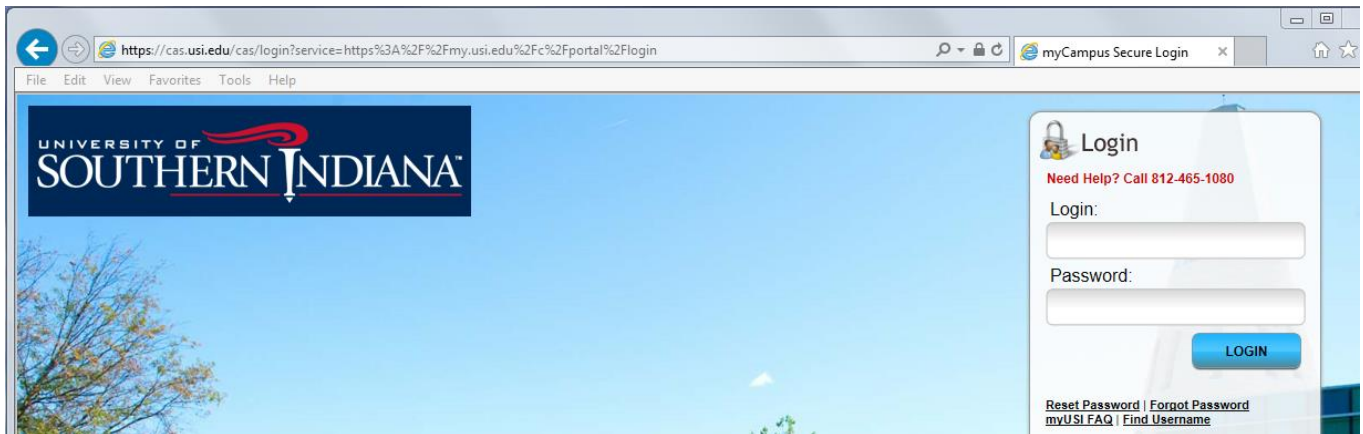
ACCESS BuyUSI:

Go to the MyUSI login page: <https://my.usi.edu/web/mycampus/home>

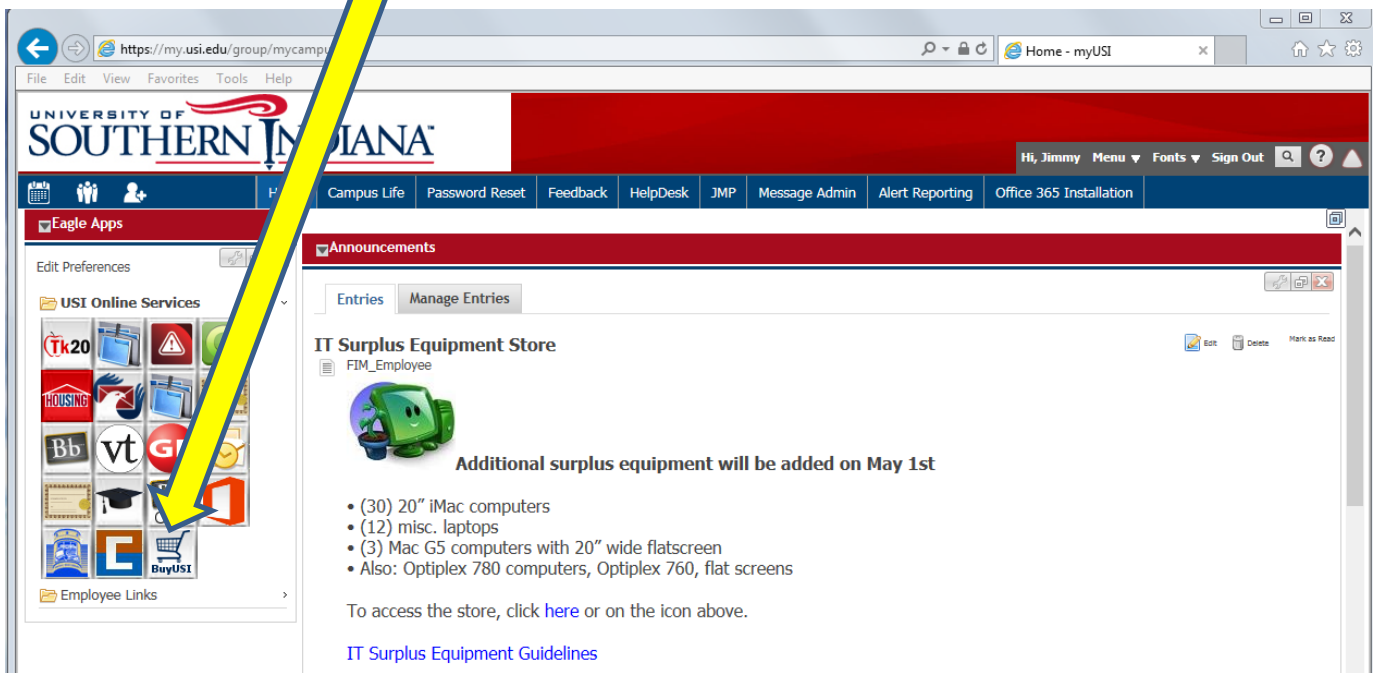
Click the “Portal Sign In”



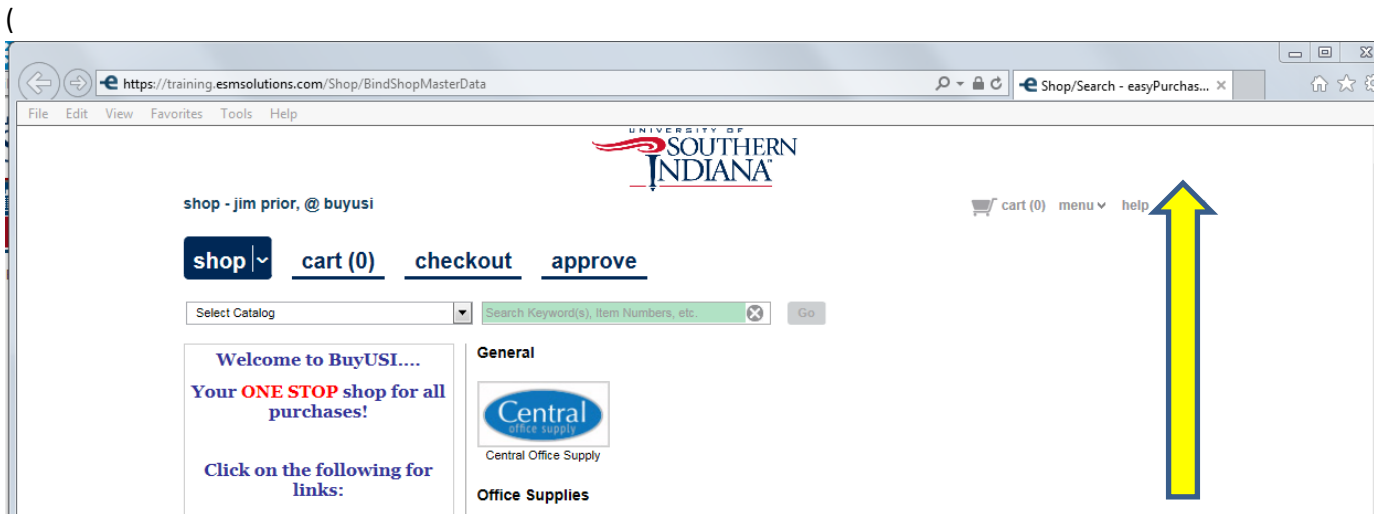
Enter network ID and password



Click the BuyUSI button

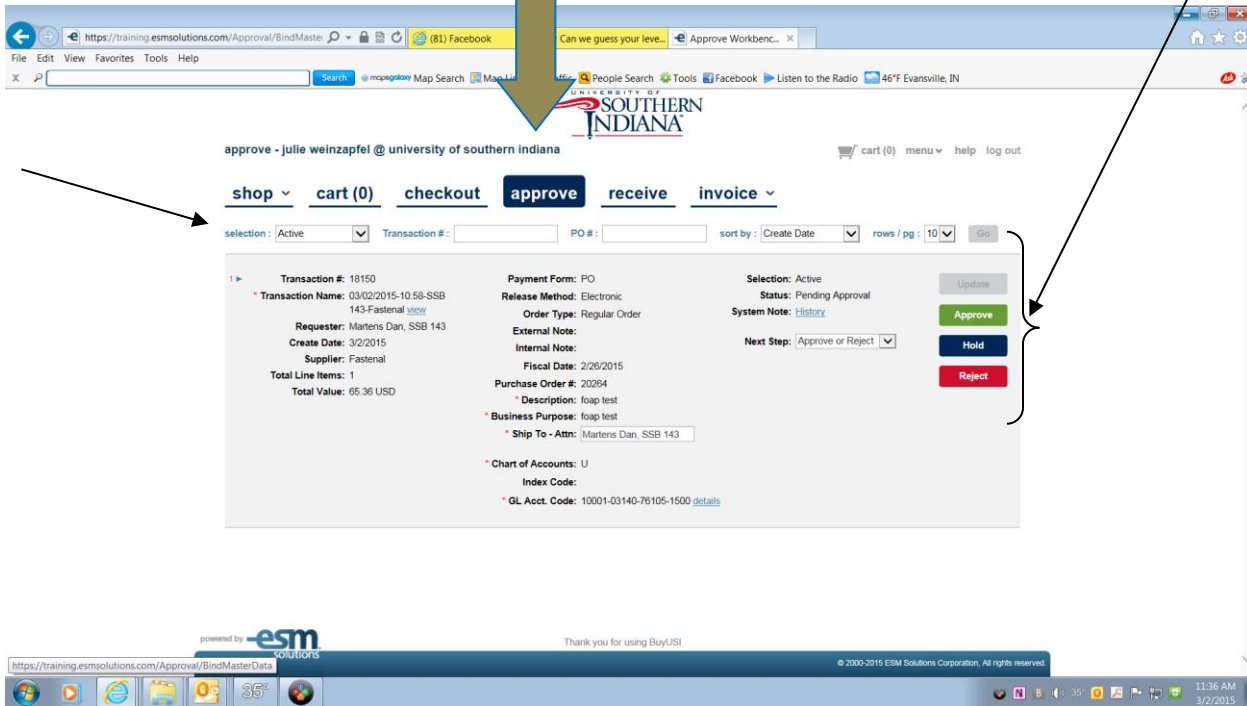


A separate window opens and you are in BuyUSI.



Note: When you click the Log Out in BuyUSI, you get a ESM logoff page. You can close that window and you are still in MyUSI.

- Go to the Approve Tab
- In the “selection” field select “Active” from the drop down box, then click “Go”
- You may use the “sort by” field to group orders together by the applicable criteria
- Click “Go”
- Orders with green “Approve”, blue “Hold” and red “Reject” buttons are currently awaiting your approval



Approving Orders: Viewing the Order

- The initial view of the order displays the “Header” information with the commodity lines hidden (collapsed).
- Click the arrow beside the number to display (expand) the commodity items.
- The header, commodity lines and footer are now displayed

Header

Transaction # : 18150
 Transaction Name : 03/02/2015-10:58-SSB
 143-Fastenal
 Requester : Martens Dan, SSB 143
 Create Date : 3/2/2015
 Supplier : Fastenal
 Total Line Items : 1
 Total Value : 65.36 USD

Commodity

1 Item/Service : Ph50 Waterproof 2-12
 Range pH Measuring Pen
 Catalog Item # : 4201817

Footer

Transaction # : 18150
 Supplier's Terms : [view](#)

Ship To : Support Services Dock
 8900 University Blvd
 Support Services Building
 Evansville, IN 47712

Subtotal: 65.36 USD
 Tax: 0.00 USD
 S & H: 0.00 USD
 Total: 65.36 USD

Approving Orders: Viewing Commodities

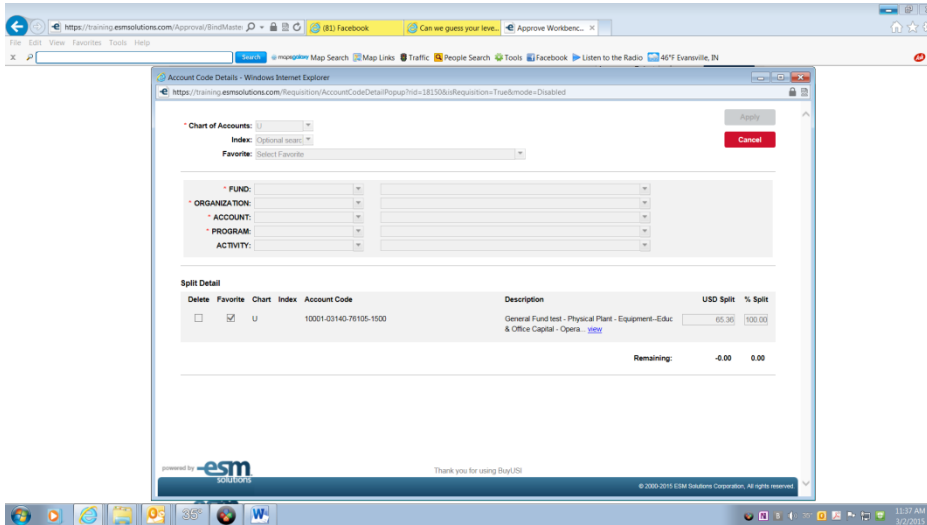
- Click the “Item/Service” link in a commodity line to view the vendor’s additional information (catalog items only) about the commodity.

Transaction # : 18150
 Transaction Name : 03/02/2015-10:58-SSB
 143-Fastenal
 Requester : Martens Dan, SSB 143
 Create Date : 3/2/2015
 Supplier : Fastenal
 Total Line Items : 1
 Total Value : 65.36 USD

1 Item/Service : Ph50 Waterproof 2-12
 Range pH Measuring Pen
 Catalog Item # : 4201817

Transaction # : 18150
 Supplier's Terms : [view](#)

- To view FOAP descriptions or FOAP splits, click the “details” link beside “GL Acct Code” either at the header screen or the line item screen. The details open in a new browser window:



- To return to the commodities window from the FOAP details, you have two options:
 - Close the browser window which will return you to the commodities screen with the commodities as you left them: expanded or collapsed
 - OR———
 - Click the “cancel” button which will return you to the commodities screen with the commodities collapsed.

Approving Orders: Notes and Attachments Internal and External

Notes:

Any notes the requestor entered on the order will be viewable. The approver may also enter external or internal notes:

- Internal notes are displayed on the header of the order within BuyUSI; but do not print on the purchase order and are not sent to the supplier
- External notes are displayed within BuyUSI on the header and on each commodity line. The header external notes are printed on the Purchase order directly below the Bill to address. The commodity line external notes are printed directly below that commodity on the purchase order.

****If the order is a resubmission following a rejection, the previous rejection reason will display in the internal notes section**

Attachments:

- Internal attachments are only viewed in BuyUSI and are not sent to the supplier
- External attachments are transmitted to the supplier (hosted catalogs only) for orders which are systematically transmitted and which are not punch out suppliers

Click “Attachments” to view the attachments associated with the order

If the requestor had entered notes, a portion of the note would be visible on this screen and the link would say “edit”

If no notes exist, the link will say “Add”. Click the “add” or “edit” link to include your own notes.

If notes already exist, take caution not to overwrite them.
Click “update”

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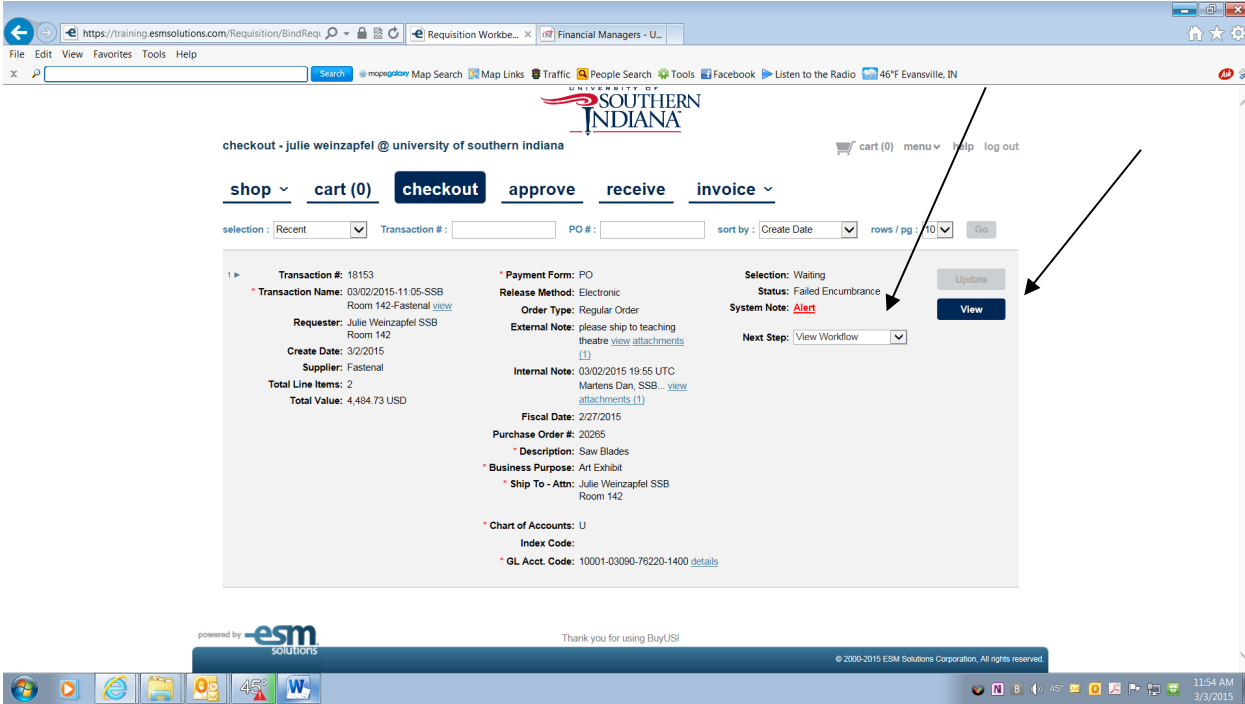
Approving Orders: Viewing Workflow

Workflow is simply the approval path an order will follow. Viewing the workflow may only be done from the Header of the order.

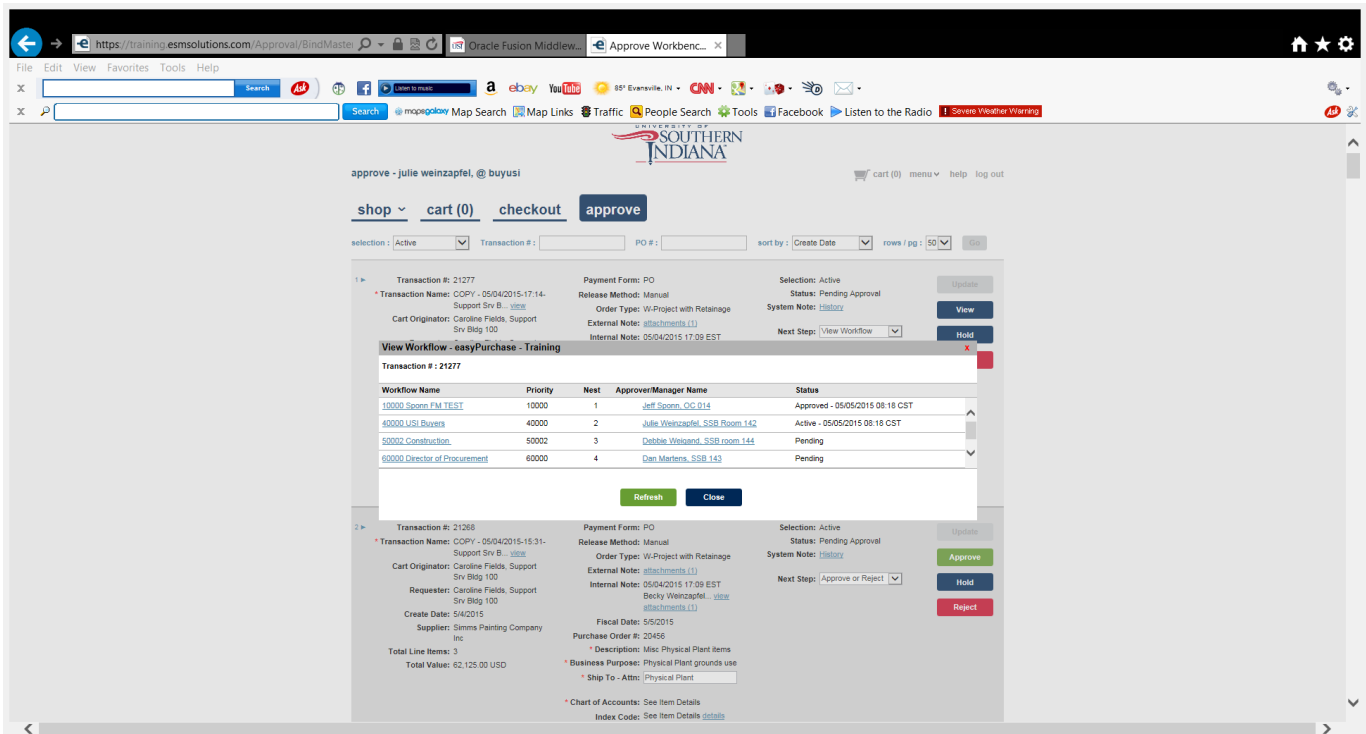
To view workflow:

- In the “Next Step” field select “View Workflow”. Click the “view” button once it is displayed

****Viewing the workflow is not a requirement to approving an order. It is done at the approvers’ preference.**



Top to bottom is the consecutive flow of the approval path for the order:



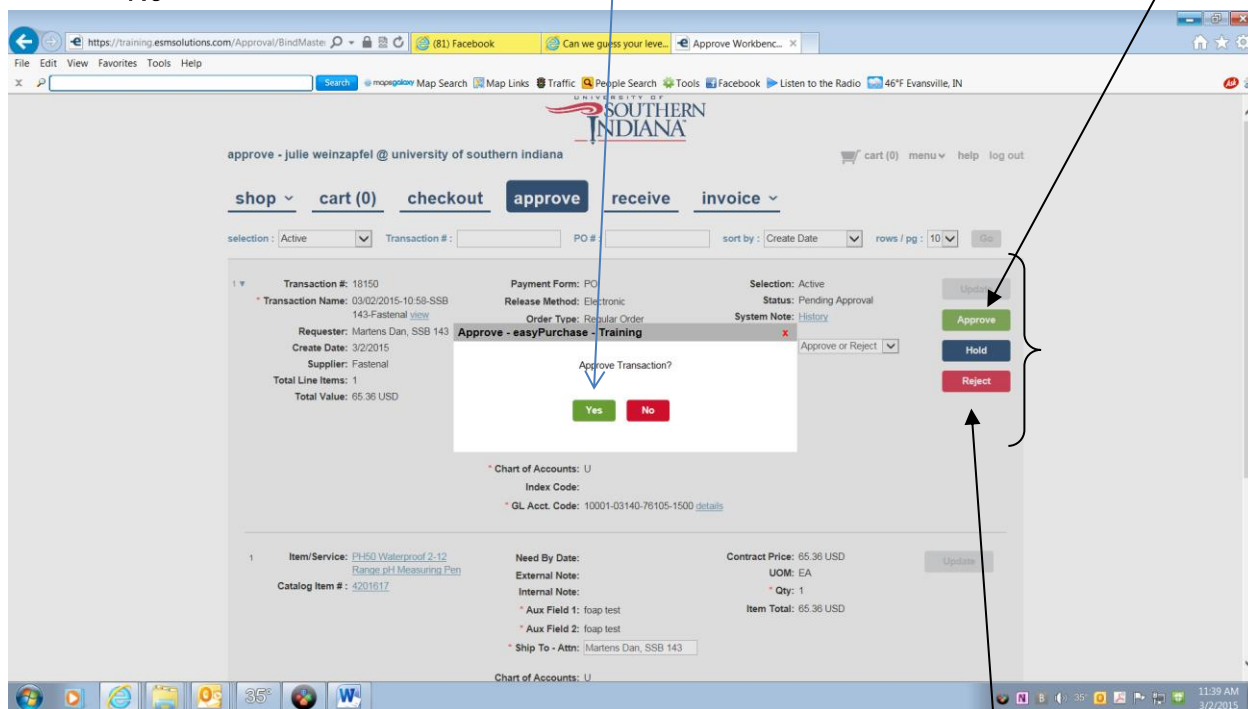
Under status, you will see one of the following:
 Approved-The date and time are shown by the name of the approver
 Active-the order is currently waiting in the queue for approval
 Pending-the order has not yet gone to the queue

Approving Orders: Approving/Rejecting the Order

Approving an order may be performed from the header or the footer of the order.

To perform an approval:

- Select “Approve or Reject” in the “Next Step” field. Then click the green “Approve” button.
- Confirm the approval by clicking “Yes” in the pop-up window. Cancel the approval by clicking “No”

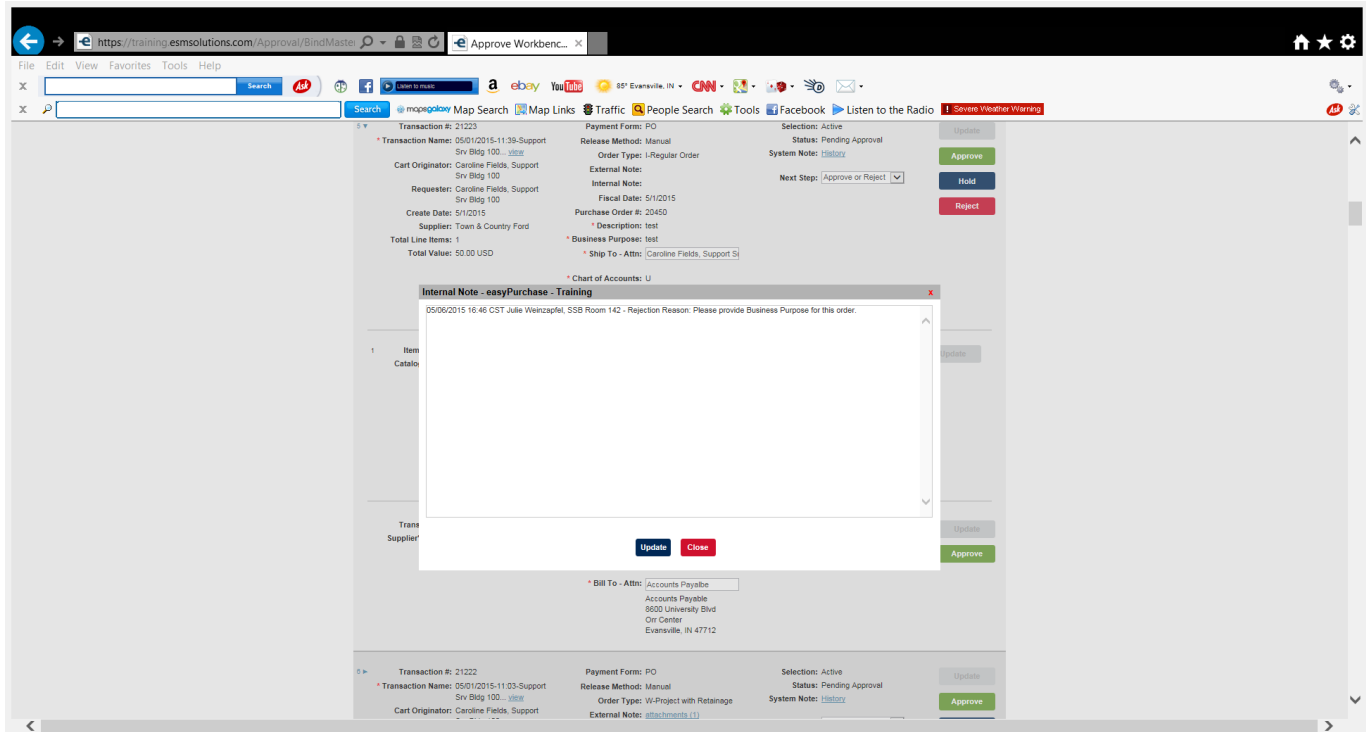
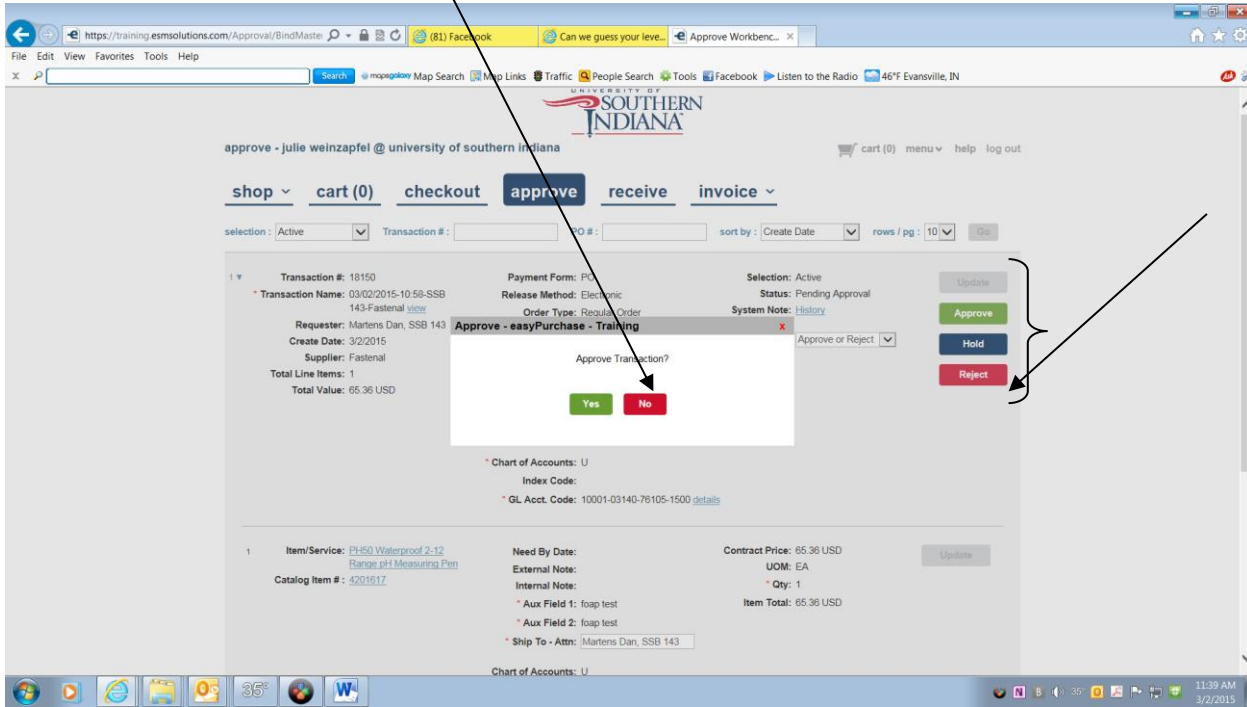


Rejecting an order may only be performed from the header of the order

To perform a rejection:

- Select “Approve or Reject” in the “next step” field. Then click the red “reject” button
- Confirm the rejection by clicking “yes” in the pop-up window. Cancel the rejection by clicking “no”. This is the last opportunity to cancel the rejection.

- Type the reason for the rejection in the “rejection reasons” pop-up window
- Click update
- Clicking close or clicking the x without clicking “Update” will NOT save the rejection reason.
- If an order is rejected, the user will receive an e-mail notice. The user may view the rejection reason in the internal notes of the order at Checkout and take appropriate corrective action.



Once all approvals have been satisfied for the normal workflows, Procurement will finalize and submit the order to the supplier.