UNIVERSITY OF SOUTHERN INDIANA

BuyUSI

Requestor Guide

Catalog (Punch-Out)

Transactions

The Requester Guide for Catalog (Punch-Out) Transactions

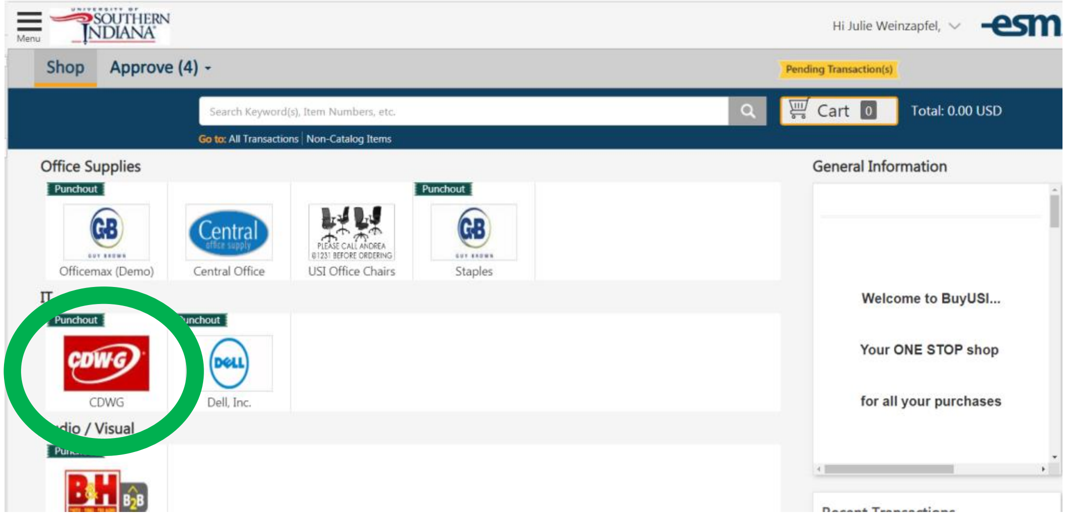
This document provides a condensed overview of the BuyUSI Requester Process. It will demonstrate with short text descriptions supported by screen shots for each step explained.

Creating Transactions:
Catalog (Punch-Out)

Catalog: A catalog transaction is where the Requestor clicks on the catalog icon and "punches out" to the vendor's live website (customized for USI). Requestors will load a cart from the website, then come back to BuyUSI to complete the transaction. Each website is vendor specific, therefore these directions are general. Each website will vary.

STEP ONE:

Click on the icon of the catalog you wish to order from:



Welcome to BuyUSI...

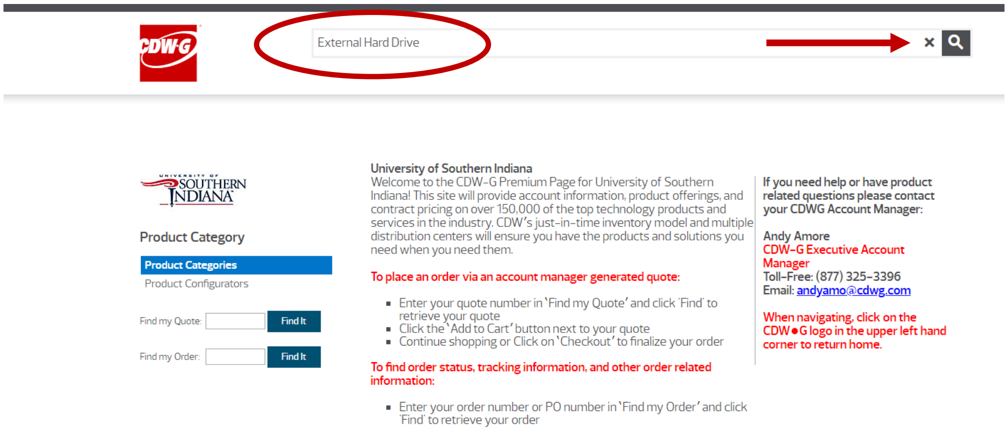
Your ONE STOP shop

for all your purchases

The system will then "punch out" to that website.

STEP TWO:

Search for the item in the website search bar:



University of Southern Indiana
Welcome to the CDW-G Premium Page for University of Southern Indiana! This site will provide account information, product offerings, and contract pricing on over 150,000 of the top technology products and services in the industry. CDW's just-in-time inventory model and multiple distribution centers will ensure you have the products and solutions you need when you need them.

To place an order via an account manager generated quote:

- Enter your quote number in 'Find my Quote' and click 'Find' to retrieve your quote
- Click the 'Add to Cart' button next to your quote
- Continue shopping or Click on 'Checkout' to finalize your order

To find order status, tracking information, and other order related information:

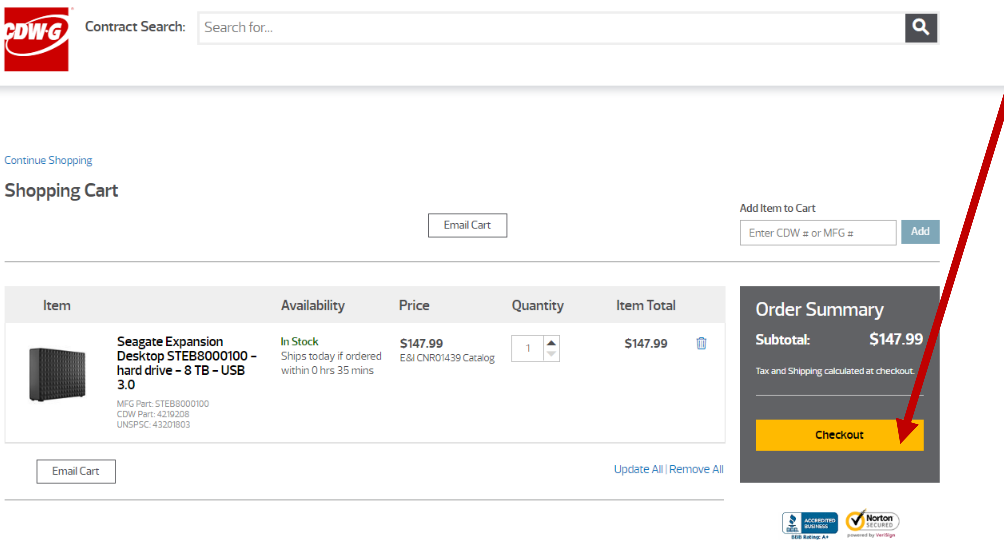
- Enter your order number or PO number in 'Find my Order' and click 'Find' to retrieve your order

If you need help or have product related questions please contact your CDWG Account Manager:

Andy Amore
CDW-G Executive Account Manager
Toll-Free: (877) 325-3396
Email: andyamo@cdwg.com

When navigating, click on the CDW●G logo in the upper left hand corner to return home.

Follow the prompts to load the website cart. Instead of entering shipping, billing and credit card information, the order goes back to BuyUSI.

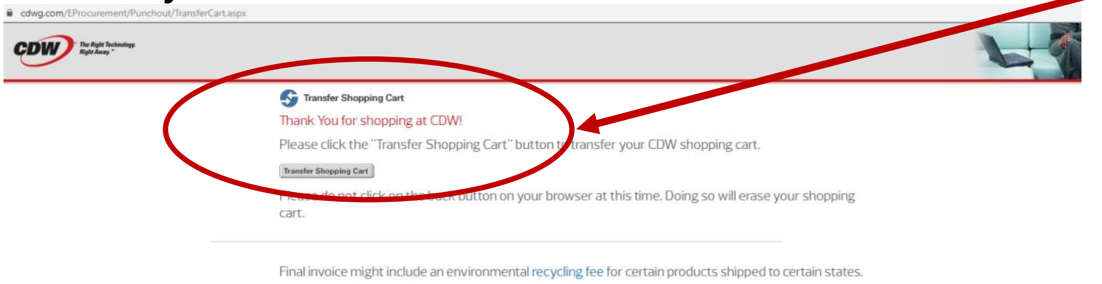


Shopping Cart

Item	Availability	Price	Quantity	Item Total
Seagate Expansion Desktop STEB8000100 - hard drive - 8 TB - USB 3.0 MFG Part: STEB8000100 CDW Part: 4219208 UNSPSC: 43201803	In Stock Ships today if ordered within 0 hrs 35 mins	$147.99 E&I CNR01439 Catalog	1	$147.99

Order Summary
Subtotal: $147.99
Tax and Shipping calculated at checkout.

Although every website may differ, most will have an area to click or select, to transfer back to BuyUSI.



Thank You for shopping at CDW!

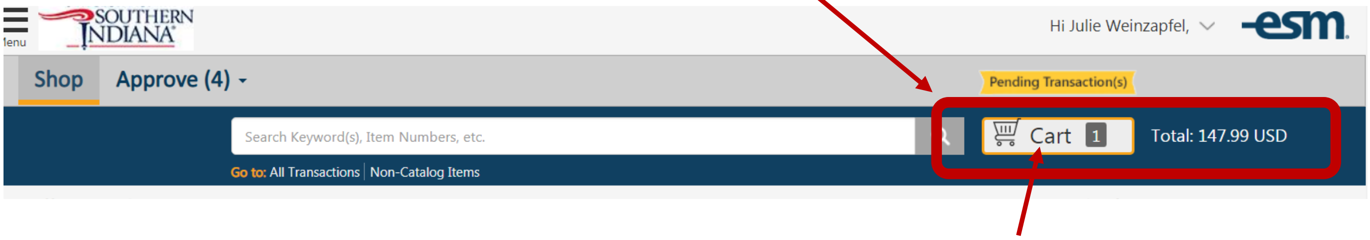
Please click the "Transfer Shopping Cart" button to transfer your CDW shopping cart.

Please do not click on the back button on your browser at this time. Doing so will erase your shopping cart.

Final invoice might include an environmental recycling fee for certain products shipped to certain states.

STEP THREE:

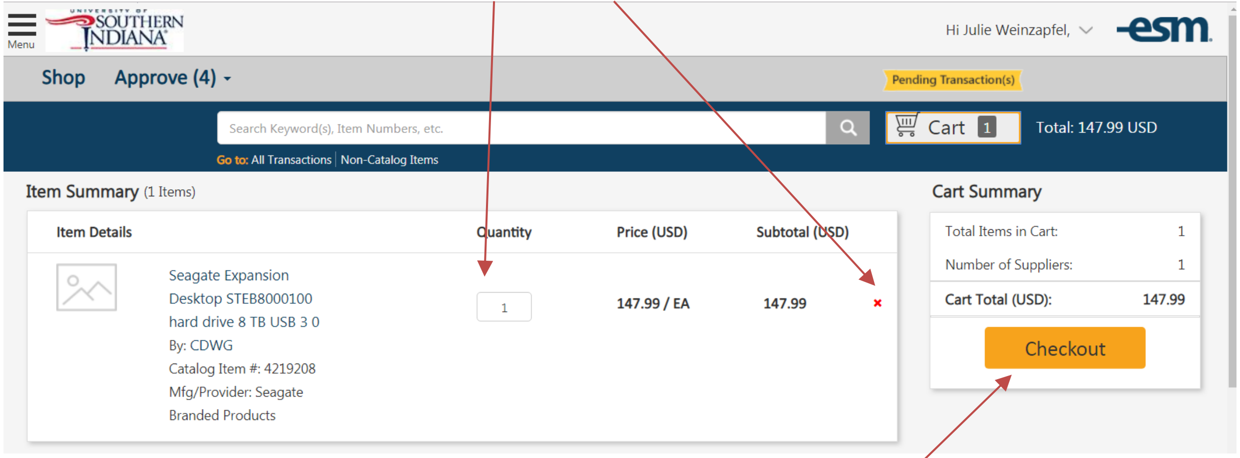
The website cart is now back in BuyUSI. The number of items that are currently in the requestor's cart and the total cost are displayed.



Click on the cart icon. This will take the requestor to the checkout page.

STEP FOUR:

The requester can edit the quantity or delete line items.



Item Summary (1 Items)

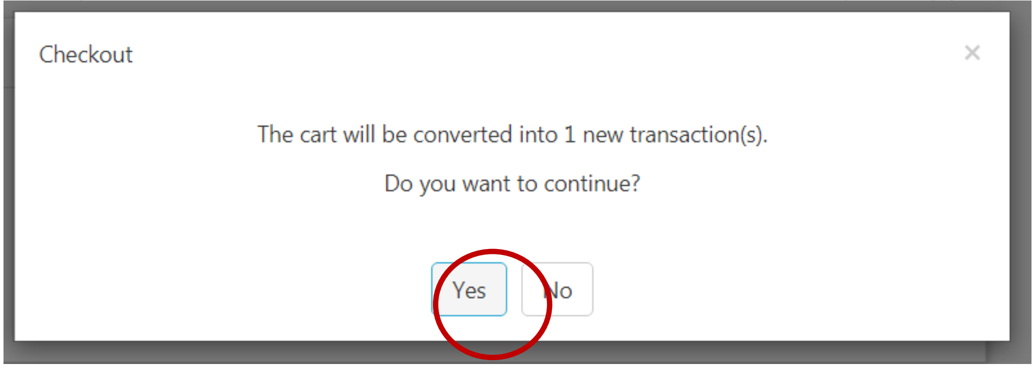
Item Details	Quantity	Price (USD)	Subtotal (USD)	
Seagate Expansion Desktop STEB8000100 hard drive 8 TB USB 3 0 By: CDWG Catalog Item #: 4219208 Mfg/Provider: Seagate Branded Products	1	147.99 / EA	147.99	×

Cart Summary

Total Items in Cart:	1
Number of Suppliers:	1
Cart Total (USD):	147.99

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

Multiple transactions are created if the items are from multiple Suppliers.



The cart will be converted into 1 new transaction(s).

Do you want to continue?

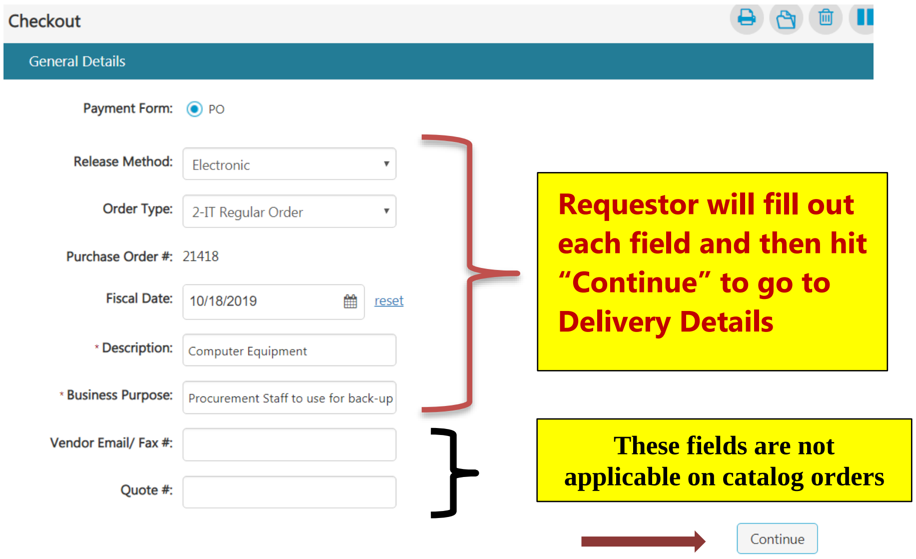
STEP FIVE:

Checkout

Under **Checkout,** Requestors will see seven sections:

1. General Details
2. Delivery Details
3. Billing Details
4. GL Details
5. Line Item Details
6. Notes and Attachments
7. View Workflow Details

1. General Details



Payment Form: ● PO

Release Method: Electronic

Order Type: 2-IT Regular Order

Purchase Order #: 21418

Fiscal Date: 10/18/2019 reset

* Description: Computer Equipment

* Business Purpose: Procurement Staff to use for back-up

Vendor Email/ Fax #:

Quote #:

Requestor will fill out each field and then hit “Continue” to go to Delivery Details

These fields are not applicable on catalog orders

2. Delivery Details

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

* Ship To - Attn: Julie Weinzapfel, SSB Room 142

Default Location:

Default Location

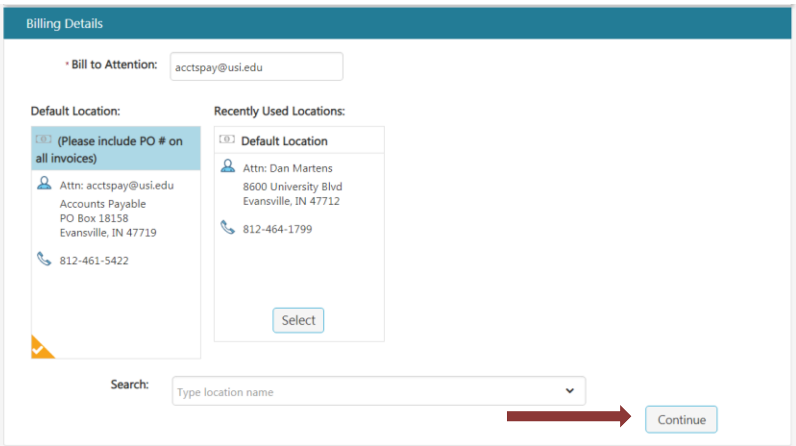
8600 University Blvd
Evansville, IN 47712

812-464-1799

Search: Type location name

3. Billing Details

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


Billing Details

* Bill to Attention: acctspay@usi.edu

Default Location:

(Please include PO # on all invoices)
Attn: acctspay@usi.edu
Accounts Payable
PO Box 18158
Evansville, IN 47719
812-461-5422

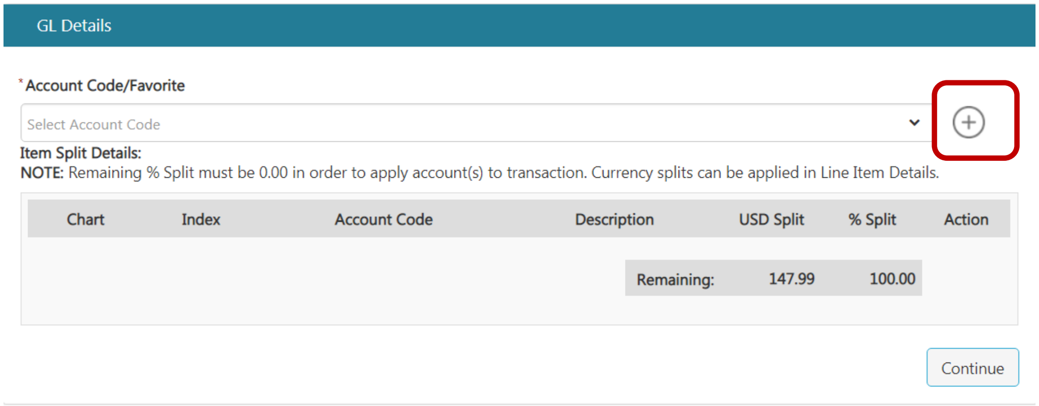
Recently Used Locations:

Default Location
Attn: Dan Martens
8600 University Blvd
Evansville, IN 47712
812-464-1799

Search: Type location name

4. GL Details

Click on the ⊕ icon.


GL Details

* Account Code/Favorite

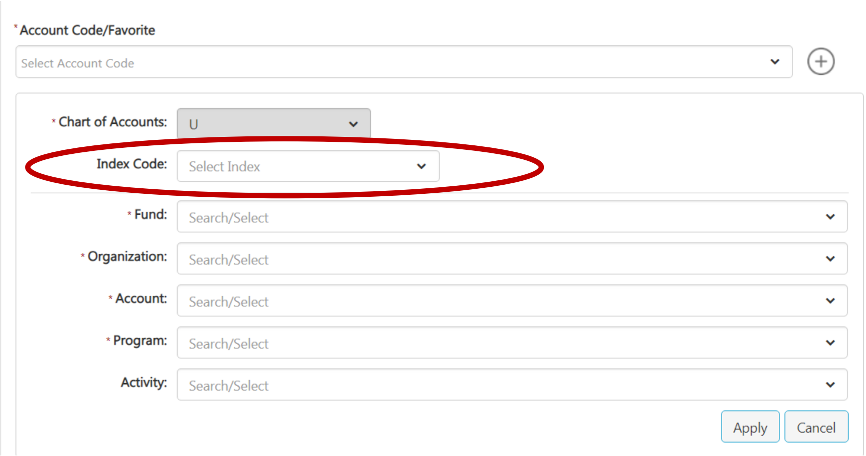
Select Account Code

Item Split Details:

NOTE: Remaining % Split must be 0.00 in order to apply account(s) to transaction. Currency splits can be applied in Line Item Details.

Chart	Index	Account Code	Description	USD Split	% Split	Action
			Remaining:	147.99	100.00	

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.



*Account Code/Favorite: Select Account Code

*Chart of Accounts: U

Index Code: Select Index

*Fund: Search/Select

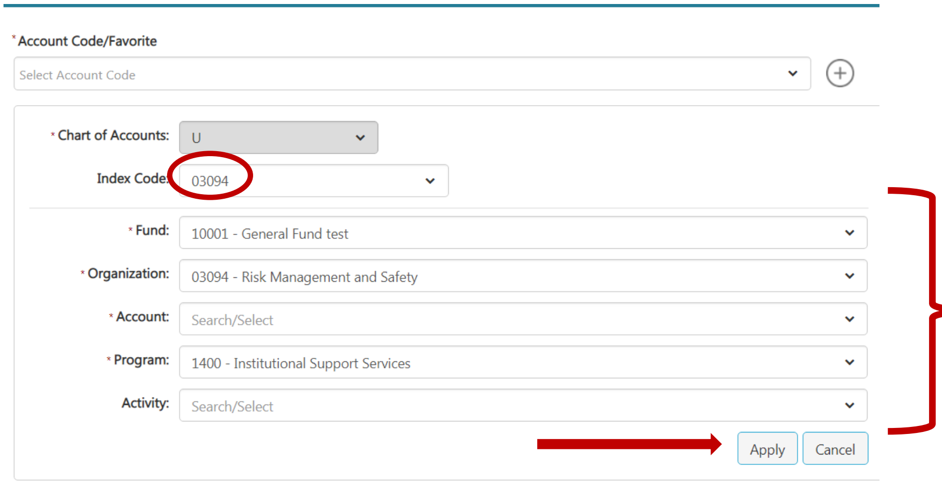
*Organization: Search/Select

*Account: Search/Select

*Program: Search/Select

Activity: Search/Select

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.



*Account Code/Favorite: Select Account Code

*Chart of Accounts: U

Index Code: 03094

*Fund: 10001 - General Fund test

*Organization: 03094 - Risk Management and Safety

*Account: Search/Select

*Program: 1400 - Institutional Support Services

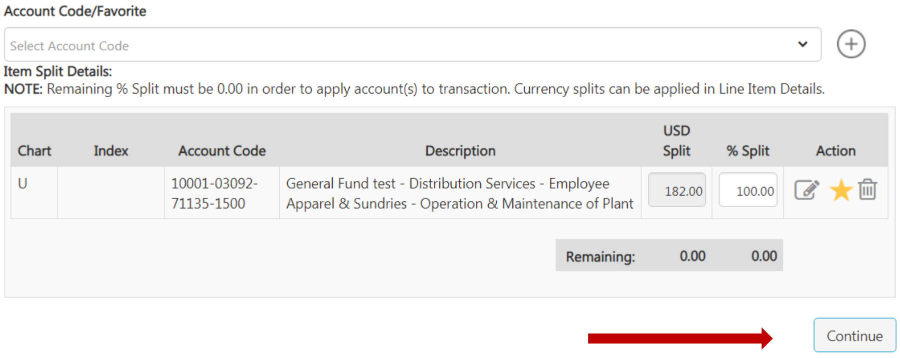
Activity: Search/Select

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

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).

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



Account Code/Favorite

Select Account Code

Item Split Details:

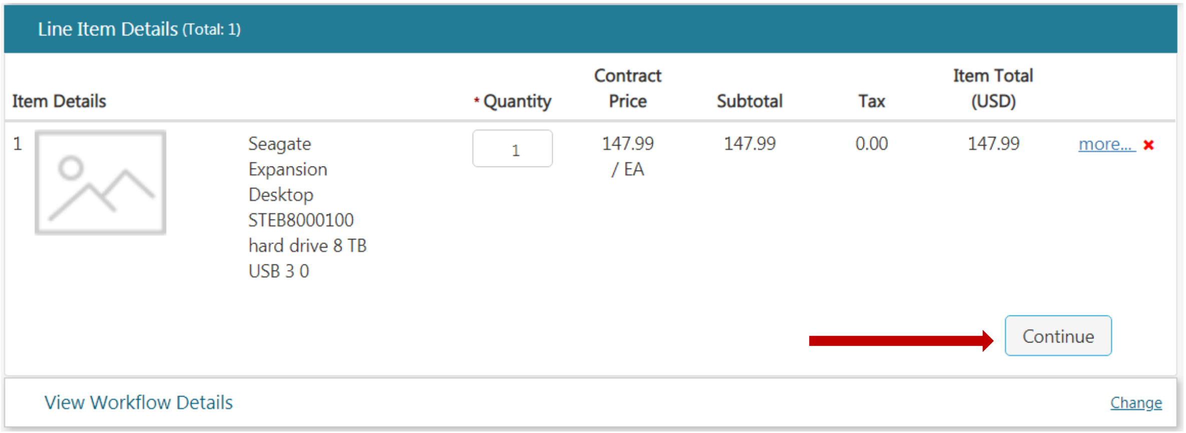
NOTE: Remaining % Split must be 0.00 in order to apply account(s) to transaction. Currency splits can be applied in Line Item Details.

Chart	Index	Account Code	Description	USD Split	% Split	Action
U		10001-03092-71135-1500	General Fund test - Distribution Services - Employee Apparel & Sundries - Operation & Maintenance of Plant	182.00	100.00	
			Remaining:	0.00	0.00	

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).



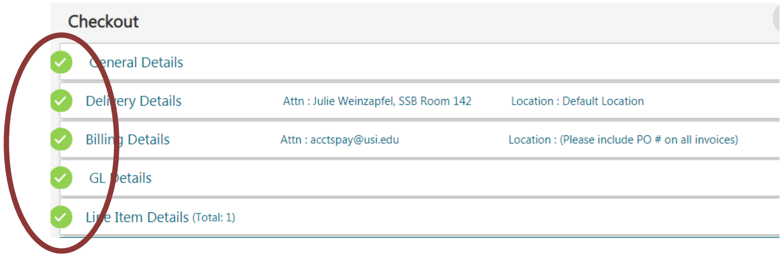
Line Item Details (Total: 1)

Item Details		* Quantity	Contract Price	Subtotal	Tax	Item Total (USD)	
1	Seagate Expansion Desktop STEB8000100 hard drive 8 TB USB 3 0	1	147.99 / EA	147.99	0.00	147.99	more… ✖

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

Select Continue to save/confirm information in each section.

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



Checkout

✓ General Details

✓ Delivery Details — Attn : Julie Weinzapfel, SSB Room 142 — Location : Default Location

✓ Billing Details — Attn : acctspay@usi.edu — Location : (Please include PO # on all invoices)

✓ GL Details

✓ Line Item Details (Total: 1)

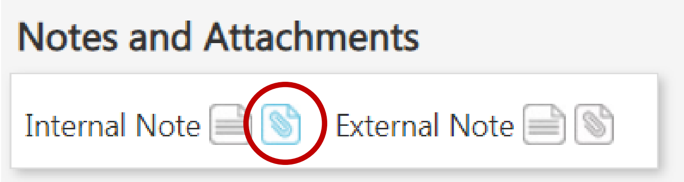
The transaction can be Copied, Deleted, or put on Hold using the icons at the top of the Checkout Screen.

Transaction #: 153886

Create Date: 10/18/2019

6. Notes and Attachments

Notes and attachments are typically not necessary with catalog orders as there is not quote to attach.

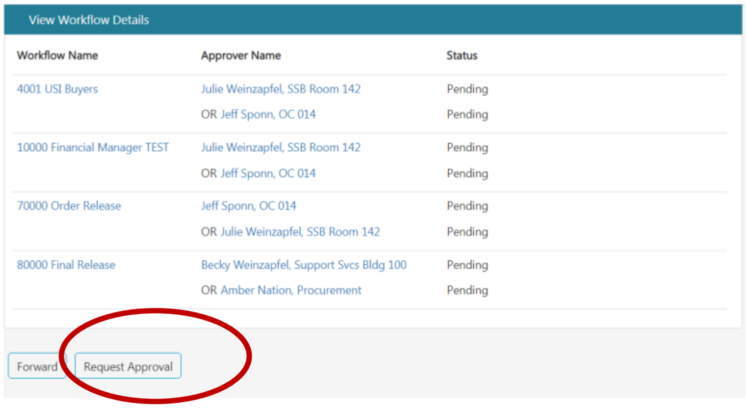


- External notes print on the PO that the vendor receives
- External attachments are sent via email to the vendor with their PO copy
- Internal notes and attachments remain in BuyUSI. These are used for internal communication.

7. View workflow Details

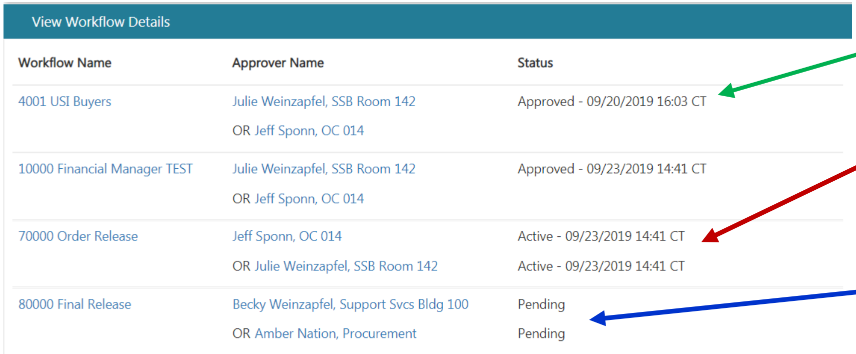
The workflow will generate after the order is validated. The requestor will be able to see who will be reviewing and approving their transaction. If any transaction validation rules are triggered, more information will be listed under the System Note. Once the condition is resolved, the transaction can be re-validated for approval.

Hit Request Approval to move the transaction into the approval queues



Workflow Name	Approver Name	Status
4001 USI Buyers	Julie Weinzapfel, SSB Room 142	Pending
	OR Jeff Sponn, OC 014	Pending
10000 Financial Manager TEST	Julie Weinzapfel, SSB Room 142	Pending
	OR Jeff Sponn, OC 014	Pending
70000 Order Release	Jeff Sponn, OC 014	Pending
	OR Julie Weinzapfel, SSB Room 142	Pending
80000 Final Release	Becky Weinzapfel, Support Svcs Bldg 100	Pending
	OR Amber Nation, Procurement	Pending

Viewing Workflows:



View Workflow Details

Workflow Name	Approver Name	Status
4001 USI Buyers	Julie Weinzapfel, SSB Room 142 OR Jeff Sponn, OC 014	Approved - 09/20/2019 16:03 CT
10000 Financial Manager TEST	Julie Weinzapfel, SSB Room 142 OR Jeff Sponn, OC 014	Approved - 09/23/2019 14:41 CT
70000 Order Release	Jeff Sponn, OC 014 OR Julie Weinzapfel, SSB Room 142	Active - 09/23/2019 14:41 CT Active - 09/23/2019 14:41 CT
80000 Final Release	Becky Weinzapfel, Support Svcs Bldg 100 OR Amber Nation, Procurement	Pending Pending

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.

View Workflow Details

Workflow Name	Approver Name	Status
4001 USI Buyers	Julie Weinzapfel, SSB Room 142 OR Jeff Sponn, OC 014	Approved - 09/20/2019 16:03 CT
10000 Financial Manager TEST	Julie Weinzapfel, SSB Room 142 OR Jeff Sponn, OC 014	Approved - 09/23/2019 14:41 CT
70000 Order Release	Jeff Sponn, OC 014 OR Julie Weinzapfel, SSB Room 142	Rejected - 09/23/2019 14:50 CT
80000 Final Release	Becky Weinzapfel, Support Svcs Bldg 100 OR Amber Nation, Procurement	Pending Pending

Once all approvals have been obtained, Catalog orders are sent electronically through the eProcurement system to the vendor.

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