BuyUSI

Requestor Guide

Non-Catalog Transactions

The Requester Guide (New User Interface)

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:
Non-Catalog

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

STEP ONE:

- Obtain a quote/estimate or back-up to support your purchase.

  Non-Catalog vendor purchases (those using a Banner vendor):
  - $24,999.99 and under:
    Requires one quote
  - $25,000 and over:
    Requires three quotes or a sole source / single source form

  Federally Funded Orders over $10,000:
  - Requires three quotes

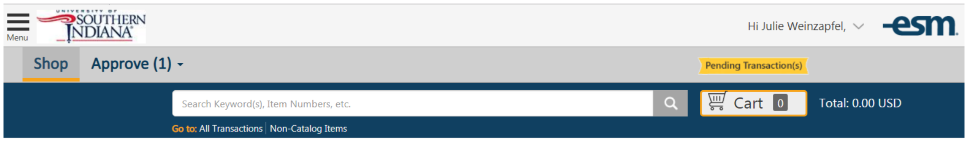
  Renovation/Construction Orders (Effective July 1, 2021):
  - $49,999.99 and under:
    Requires one quote
  - $50,000 and over:
    Requires three quotes or a sole source / single source form

- Save the document so that you can attach it to your transaction later in the process

STEP TWO:

Non-Catalog Item

The Requester creates a Non-Catalog Item by selecting the "Non-Catalog Items" option under the Search Bar on the Shop tab. A Non-Catalog Item allows the Requester to create an item that is not provided in the catalogs.

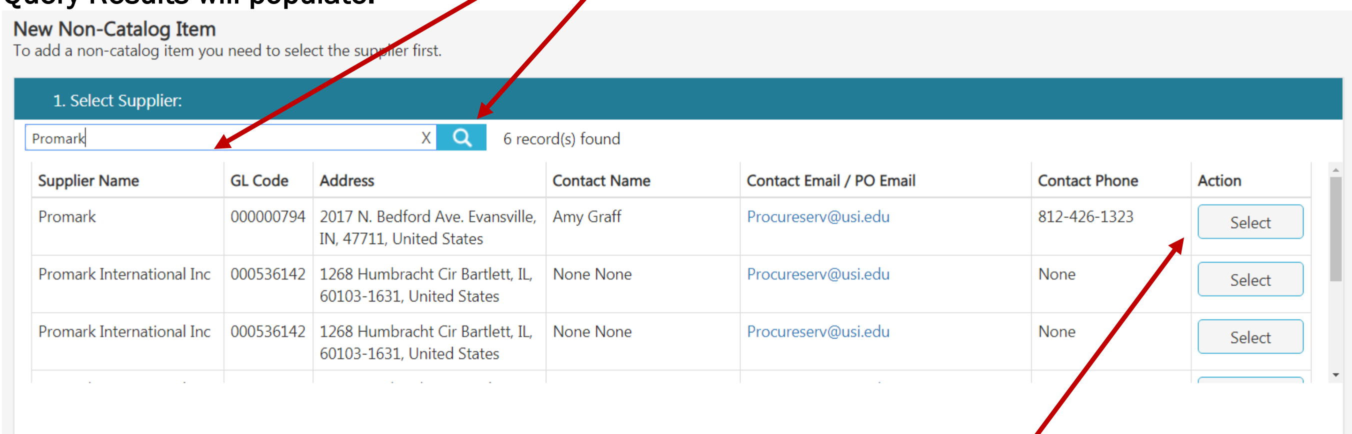


STEP THREE:

The Requester searches for the Supplier:

Type in the name of the supplier then click on the search icon.

Query Results will populate:



Click on the "Select" tab under "Action" for the supplier you wish to purchase from.

If vendor does not exist in BuyUSI, please contact Procurement Services Help Desk at: 1982 or 1601.

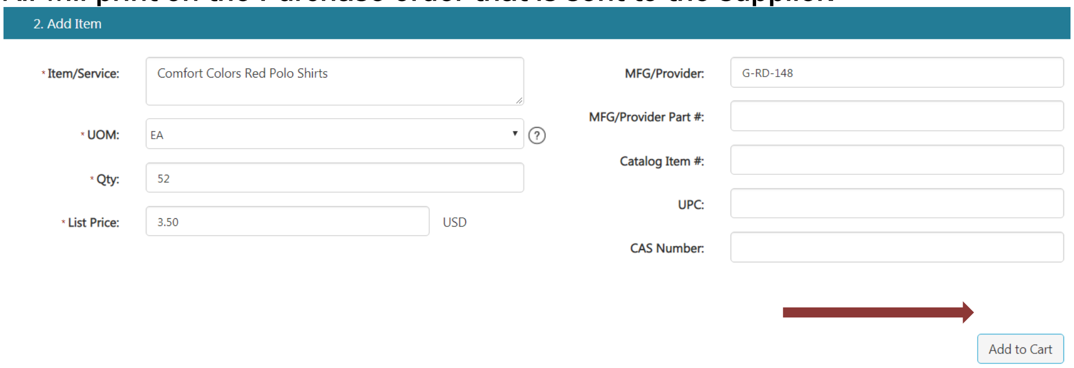
STEP FOUR:

Enter the product detail's required fields (Item/Service, UOM, Qty, and List Price) to create the item and 'Add to Cart'.

This information should come from the quote you obtained from the supplier.

- If you have the MFP/Provider number or part number go ahead and include it.

- 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.

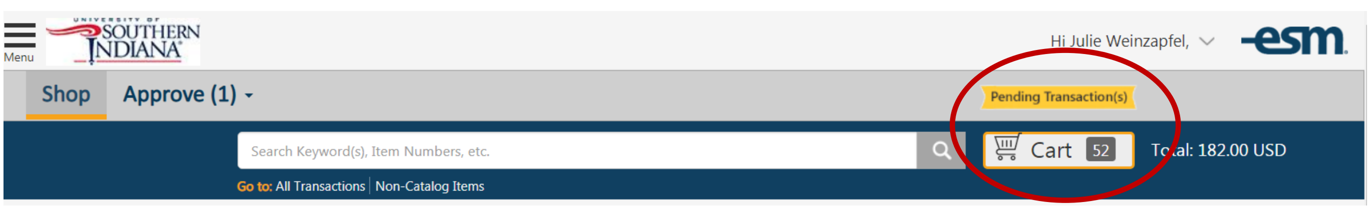
STEP FIVE:

Cart

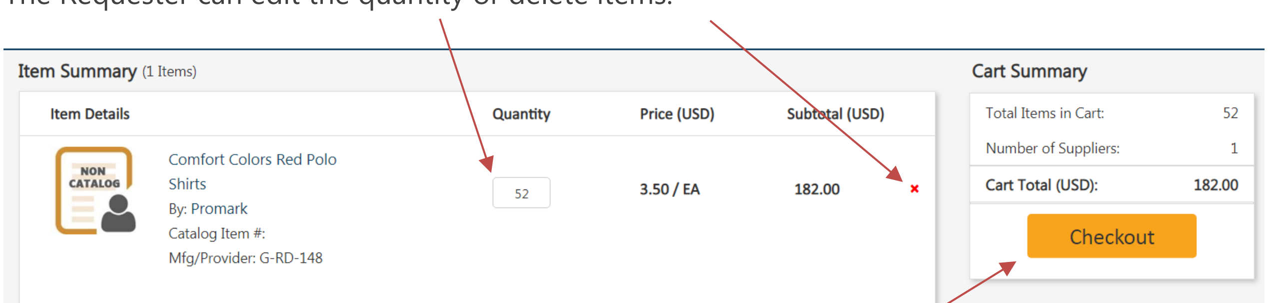
The cart icon shows how many items are currently in the requestor's cart.

Click the cart icon to view and check out

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

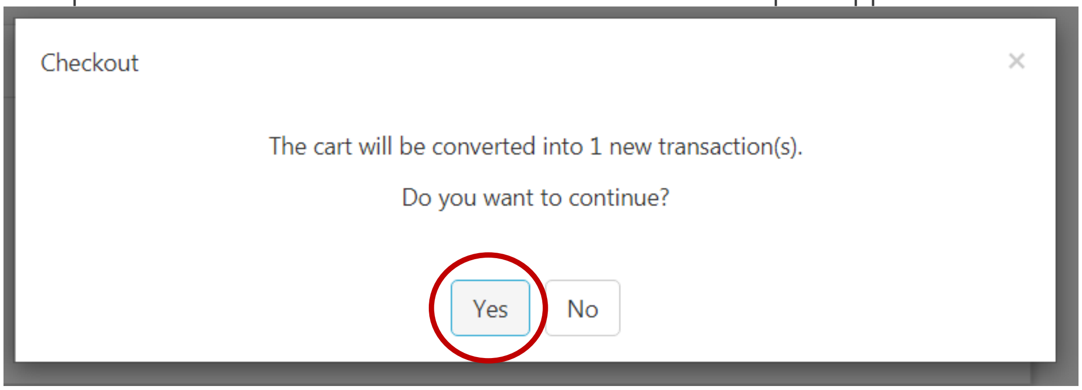


The Requester can edit the quantity or delete items.



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

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



STEP SIX:

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

Use drop down arrow to see all order types and select the appropriate order type.

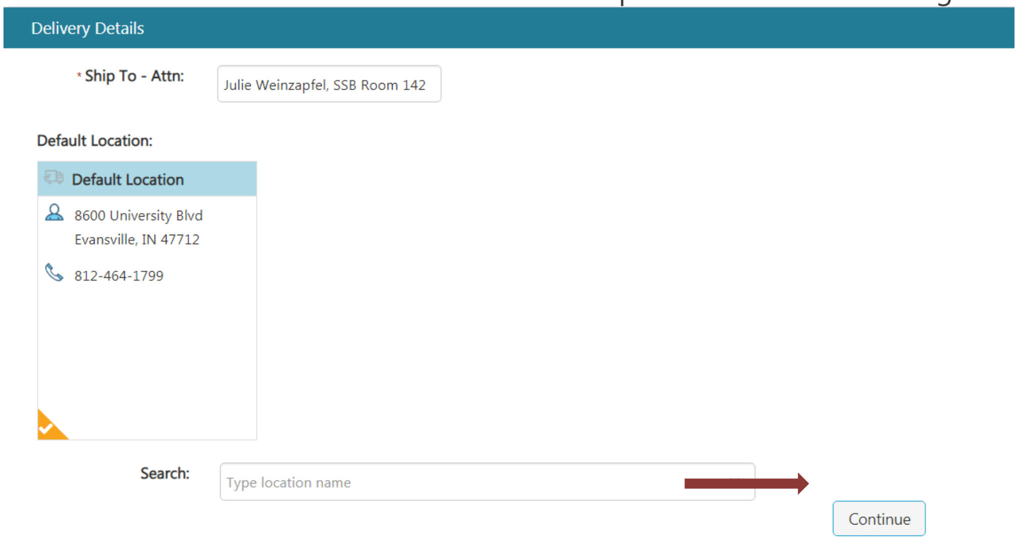
The following order types are supported in BuyUSI:

I-Regular Order	One-time standard purchase for goods or services (that are not IT, Furniture or Printing).
2-IT Regular Order	One-time standard purchase for IT related items such as hardware, software, software licenses, computer maintenance, software maintenance and audio visual equipment.
3-Printing Regular Order	One-time standard purchase for orders that involve artwork, printing, brochures, etc.
L-Standing Order-Fiscal	Orders that renew each year for specific supplies or services and run the fiscal year (July through June). The amount for this order type is typically a predetermined amount, and should include a quote or rate from the vendor showing the amount and what we will be charged for the fiscal year time frame
4-IT Standing Order-Fiscal	IT orders that renew each year for IT services, software licenses and maintenance renewals and run the fiscal year (July through June) The amount for this order type is typically a predetermined amount, and should include a quote or rate from the vendor showing the amount and what we will be charged for the fiscal year time frame
5-Furniture Order	Any transaction that includes furniture
W-Project with Retainage (Typically used by Facilities)	Project where the university holds a percentage of contract's final payment until project completion (used by Facilities)
9-Employee Reimbursement	Transaction entered to reimburse an employee for a purchase made for the department or an event, but paid for by the employee

N-Proposal Order	Order type used when an RFP (Formal Bid Process) should be processed by Procurement
Q-Physical Plant Standing $25K (Used by Facilities)	Projects where invoicing does not exceed $25K per project.
R-Standing Order- Calendar	Orders that renew each year for specific supplies or services, but run different dates throughout the calendar year. Example: 10-1 20 through 9-30-21. The amount for this order type is typically a predetermined amount, and should include a quote or rate from the vendor showing what we are buying and the amount we will be charged.
S-IT Standing Order-Calendar	Orders for IT service, software licenses and maintenance renewals that run different dates throughout the calendar year. Example: 10-1 20 through 9-30-21. The amount for this order type is typically a predetermined amount, and should include a quote or rate from the vendor showing what we are buying and the amount we will be charged.
T-Standing Blanket Order-Fiscal	Blanket orders cover various supplies. They renew each year and run the fiscal year (July through June). Blanket order amounts are estimated based on what the department expects to spend for the fiscal year
U-IT Standing Blanket Order-Fiscal	Same as above but for IT or AV supplies IT blanket orders cover various IT or Audio Visual supplies. They renew each year and run the fiscal year (July through June). Blanket order amounts are estimated based on what the department expects to spend for the fiscal year

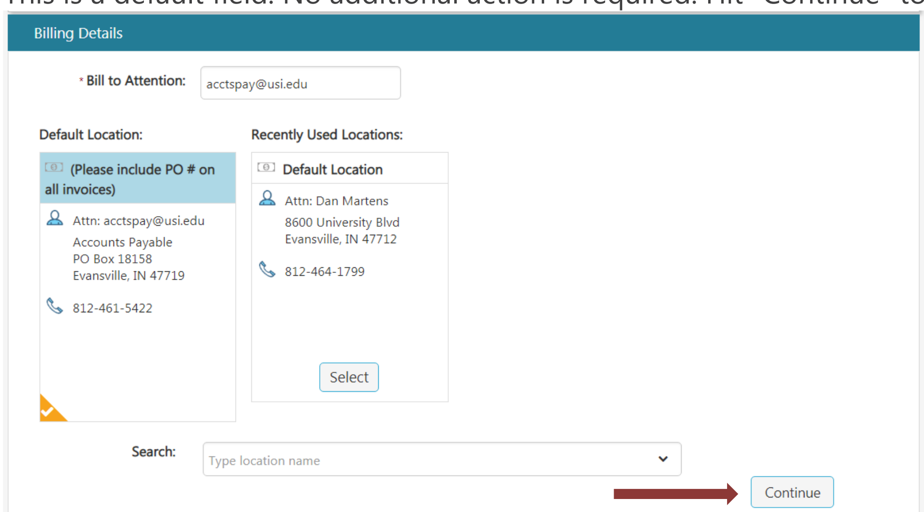
2. Delivery Details

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



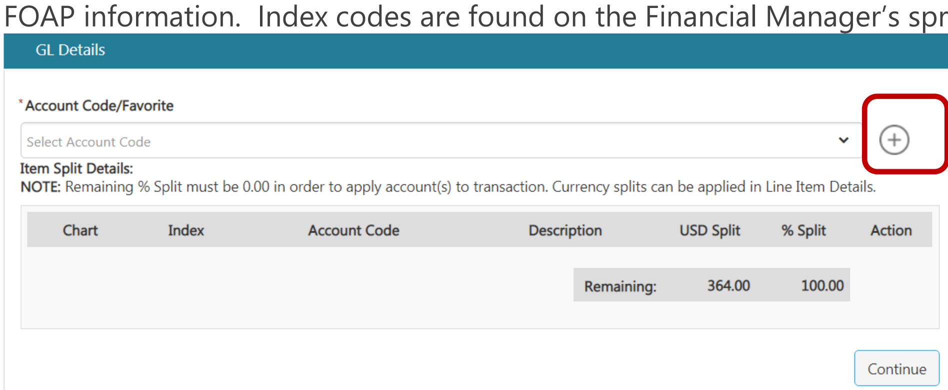
3. Billing Details

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

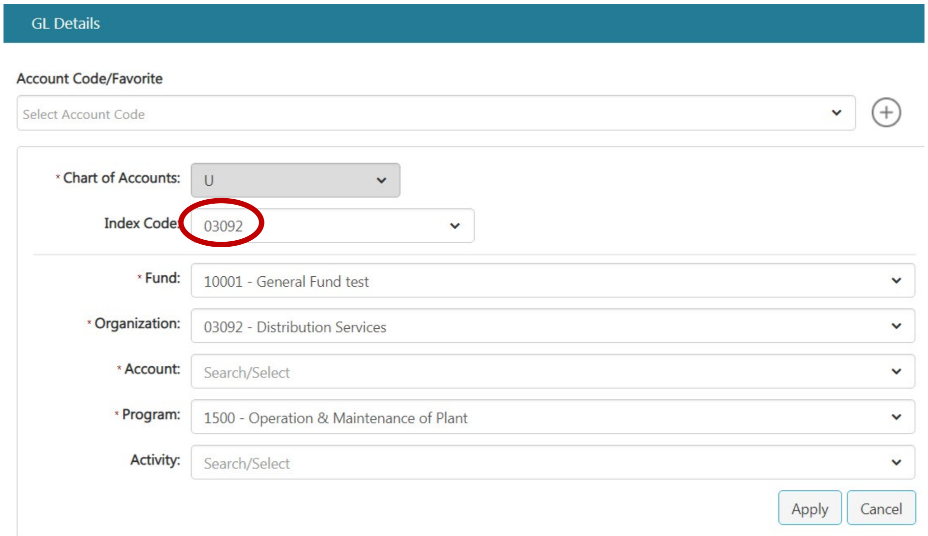


4. GL Details

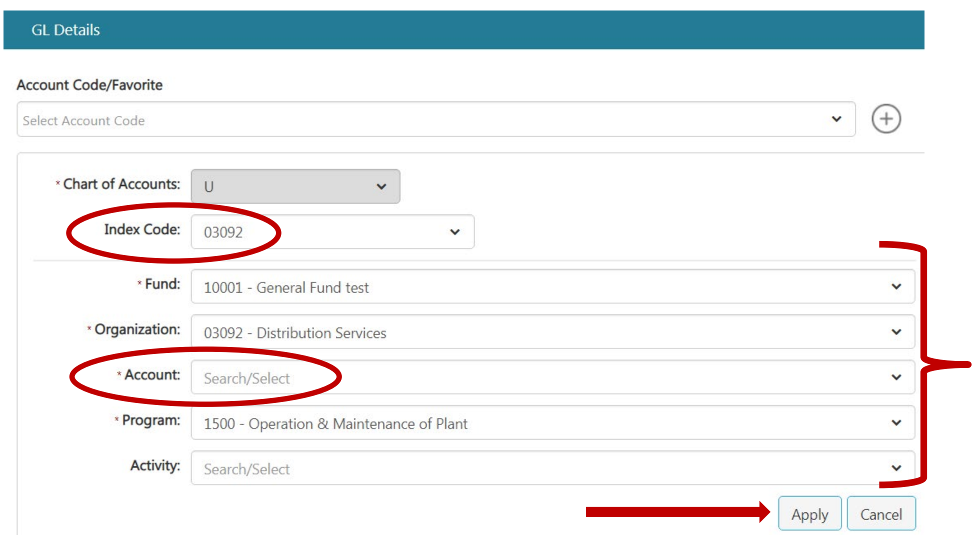
Click on the ⊕ icon. This will open a new window allowing Requestors to use the Index code for FOAP information. Index codes are found on the Financial Manager’s spreadsheet.



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.

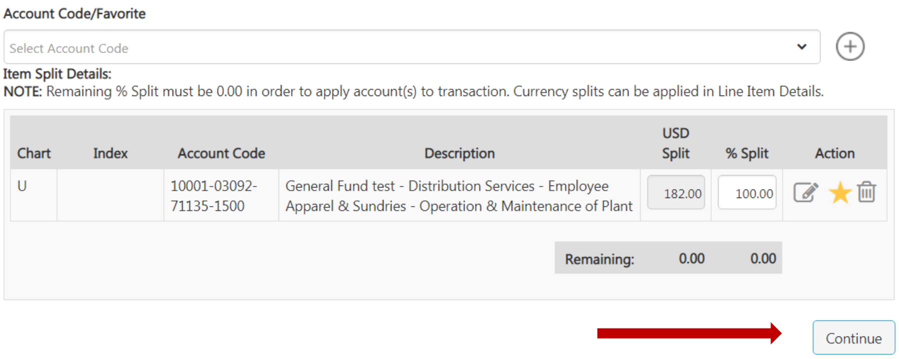


The account code will still need to be inserted based on the nature of the purchase. Users may utilize the Account Code Spreadsheet linked in the General Information panel on the left side of the shop page. Users should contact their Accountant for help with account codes. (Accountant contacts are listed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

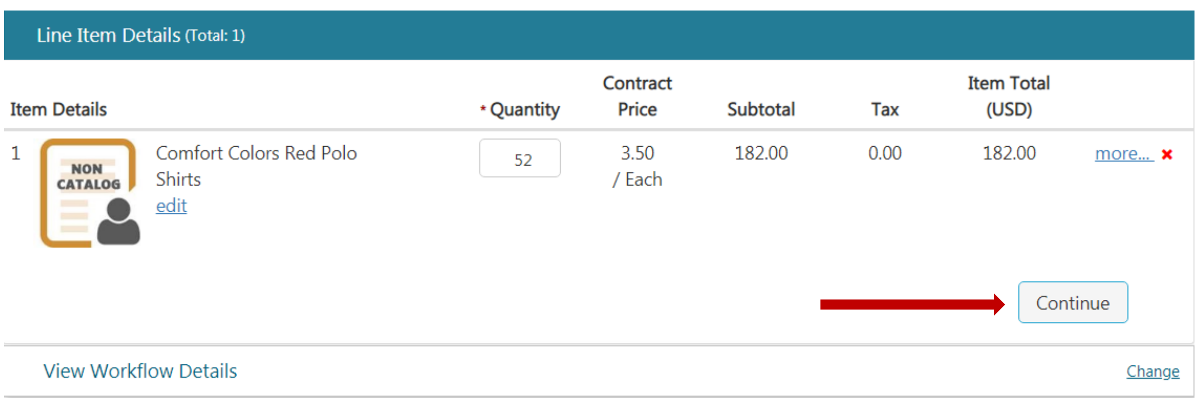
After the appropriate account code is entered hit “Apply” then continue.



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).



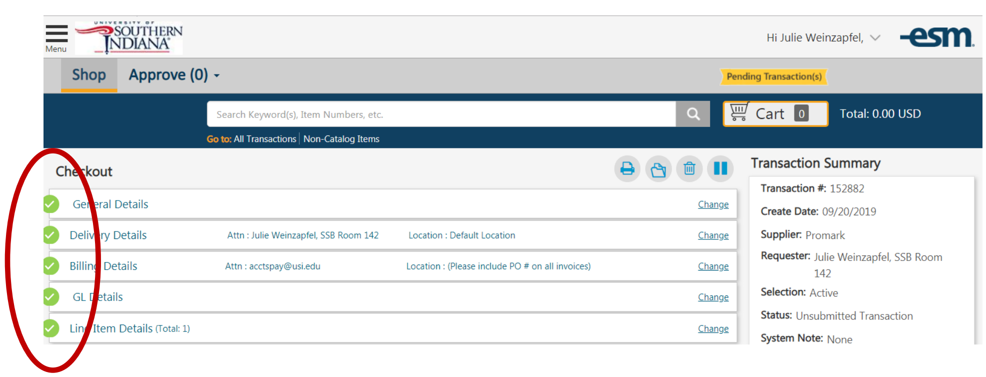
Select Continue to confirm Line Item Details.

Complete each portion of the Checkout sections to complete the order.

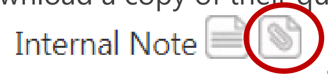
Select Continue to save/confirm information in each section.

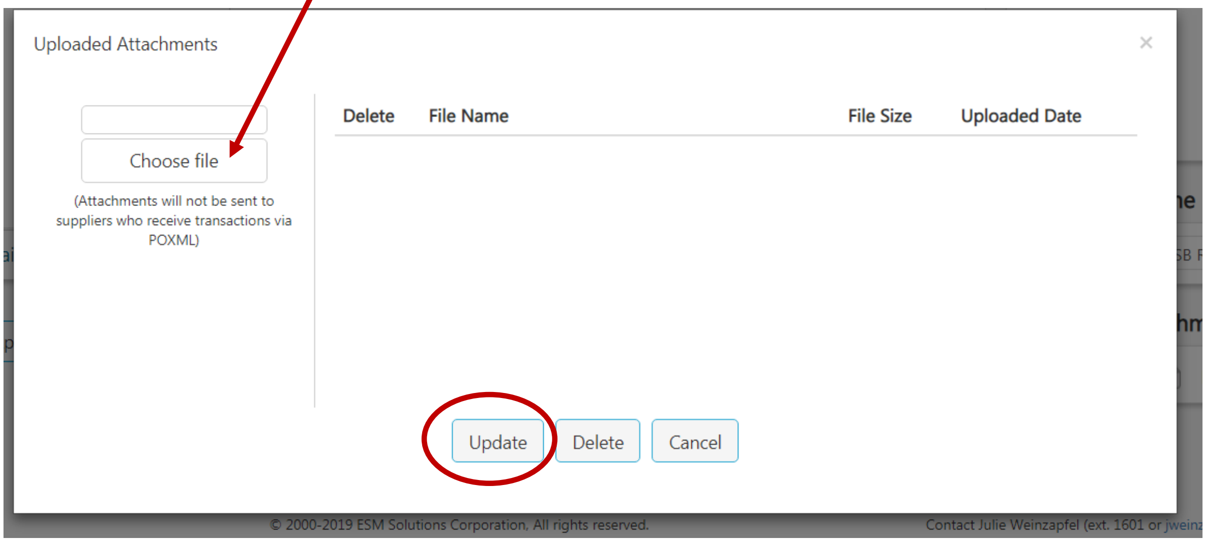
The order can be Copied, Deleted, or put on Hold using the icons at the top of the Checkout Screen.

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

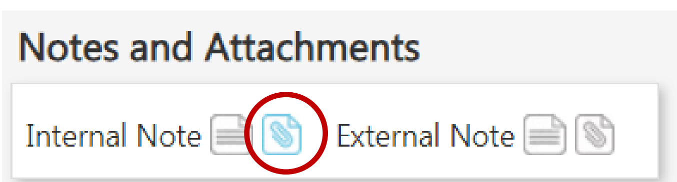


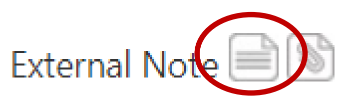
6. Notes and Attachments

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



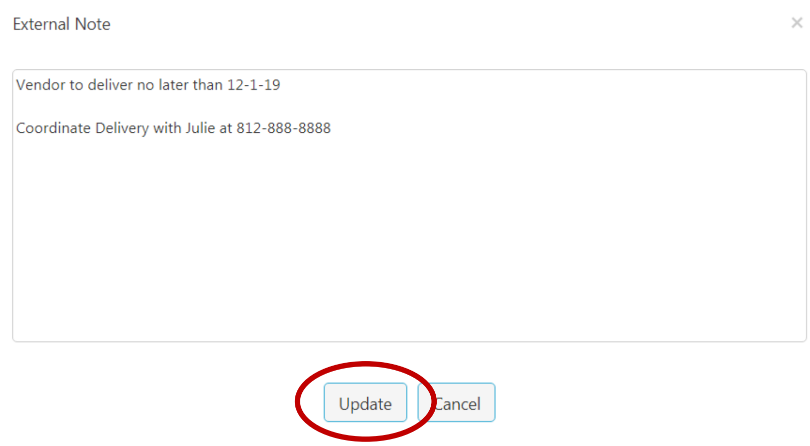
The paperclip icon will change from grayscale to blue, indicating that there is an attachment:



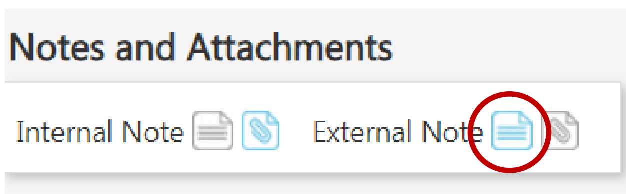
Next the user will click on the External note icon  and chose the note option. This will open a window for text.

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

Click on "Update" to save notations.



The paper icon will change from grayscale to blue, indicating that there is note:

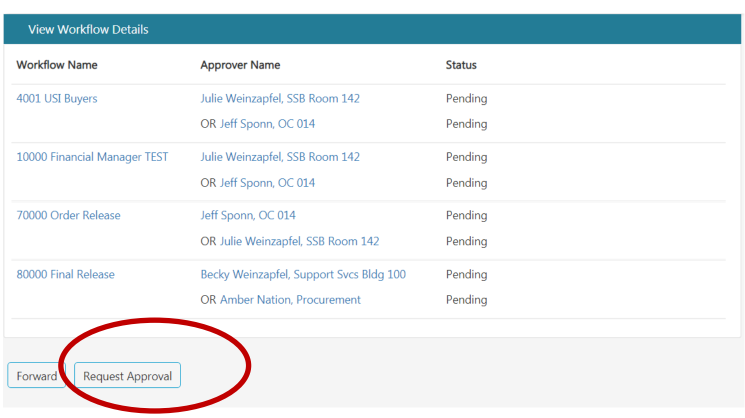


- External notes print on the PO that the vendor receives
- External attachments are sent via email to the vendor with their PO copy
- Internal notes and attachments remain in BuyUSI. These are used for internal communication.

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:



View Workflow Details

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

Forward Request Approval

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, 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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