



Table of Contents

Accessing eBuy	1
Shopping from a Punchout Catalog	2
Shopping from a Hosted Catalog	4
Assigning a Cart - Shoppers.....	6
Place Order – Initiator/Requester.....	6
Email Preferences	7
Sending a Cart to PReqs	8
Approving a Cart in PReqs and Sending to Workflow.....	9



Accessing eBuy

Note: Mac users who experience problems accessing or using eBuy may wish to try using Mozilla Firefox as their web browser. Some punchout sites also require that users have cookies enabled to work properly. See the [Support Browser documentation](#) on the Purchasing eBuy Training Materials web site @ www.uiowa.edu/ap-purchasing/ebuy for further information.

Sign in to Employee Self Service Web Application using Hawk ID and Password.

The screenshot shows the 'Employee Self Service' portal for The University of Iowa. The header includes the university logo and the text 'Employee Self Service Finance and Operations Web Applications'. The main heading is 'Welcome to the Finance and Operations (FO) Web Applications Portal'. Below this, a paragraph states: 'This is your single point of access for FO Web Applications including Self Service, Workflow, PCard, GL DSS, and the HR Data Access Applications. Please sign in using:'. A numbered list follows: '1. Your Hawk ID, and 2. Your Hawk ID Password'. To the right is a 'Hawk ID Login' box with input fields for 'Hawk ID:' and 'Password:', and a 'Sign In' button. Below the login box are 'Links to Common Questions' with three bullet points: 'Don't know your hawkid?', 'Forgot your password?', and 'More hawkid information...'. At the bottom left, there is an 'IMPORTANT INFORMATION' section with a bullet point: 'Employees using shared computers are advised to click sign out and then exit'.

Click on link to E-Pro

The image shows two screenshots. The left screenshot is a 'MY SELF SERVICE' navigation menu. It features a star icon and the text 'My Self Service Favorites'. Below that, it says 'SECTION: ADMINISTRATION'. There are three items listed: 'AP-PO PeopleSoft << Data Access', 'E-Pro(E-Vouchers & PReqs)', and a blue arrow pointing from the 'E-Pro(E-Vouchers & PReqs)' link to the right. The right screenshot is the 'One Stop e-Procurement' portal. It has a blue header with the text 'One Stop e-Procurement'. Below the header, there are four main categories: 'eVoucher', 'PReqs', 'eBuy', and 'ProTrav'. The 'eBuy' category is circled in blue. The 'eBuy' description reads: 'An approved solution providing a connection to primary suppliers'. The 'PReqs' category includes 'Goods and Services', 'Equipment', 'Request for Quotations', 'Contracts & Replenishment', and 'Vendor required purchase order requirements & info'. The 'eVoucher' category includes 'Non-Services', 'Non-Procurement', 'Non-Procurement - \$1000', 'Non-Procurement - \$1000', 'JIT/Just', 'Refunds', 'Subscriptions', and 'Research Subjects'. The 'ProTrav' category includes 'Low dollar Goods', '\$1,500 or less', and 'Travel Related Expenses'.

Click on link to eBuy

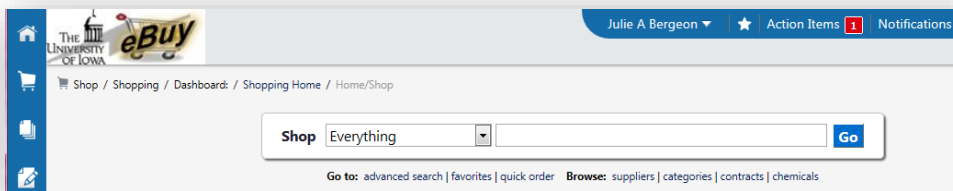
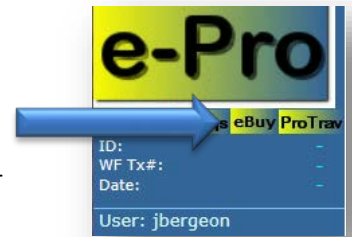


eBuy can also be accessed via a link on the PReqs sidebar. Click on **eBuy**. Both methods will take Shoppers to the University of Iowa eBuy home page where they will create their Shopping Carts.

Shoppers may search for products from Punchout or Hosted catalogs.

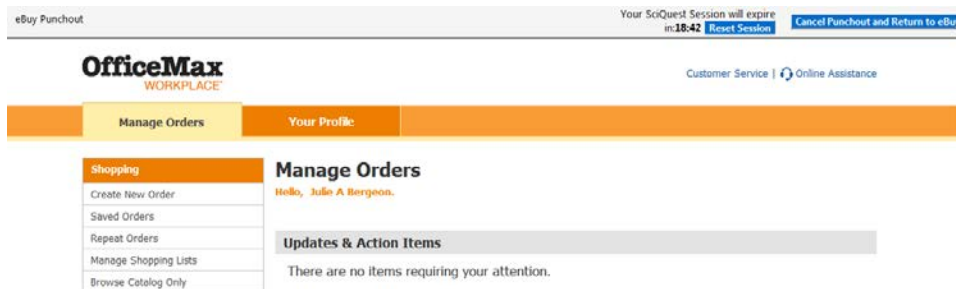
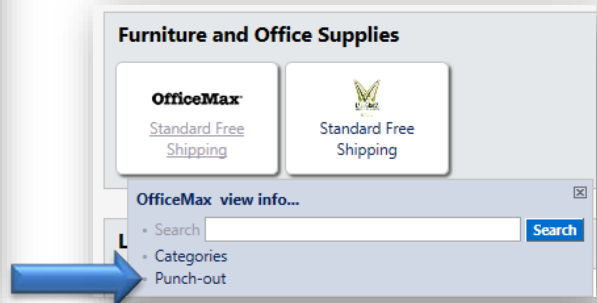
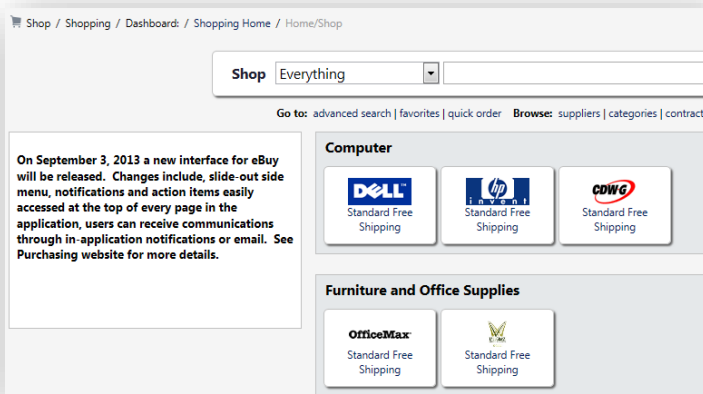
Punchout catalogs are accessed online via a supplier's external website. The user "punches-out", or exits eBuy to search and select products from a supplier's web site catalog, with specific UI pricing, then returns the items to an eBuy shopping cart. Hosted catalogs are "housed" directly in eBuy. There is no redirect to access the supplier's commodities. All search function will span across hosted catalogs.

Select the Supplier you wish, or just search for what you're looking for in the **Shop-Everything** box.



Shopping from a Punchout Catalog

To search for items in a specific Punchout catalog, click the Supplier Logo in the **Home/Shop** section.



This will take the Shopper directly to the Supplier's catalog webpage. Note that the Shopper is, however, still in the University of Iowa eBuy system. It is possible to exit the Punchout catalog at any time and return to the eBuy Home page by clicking on **Cancel Punchout and Return to eBuy**. *Note: Session expiration lasts 20 minutes. Click the Reset Session to extend.*



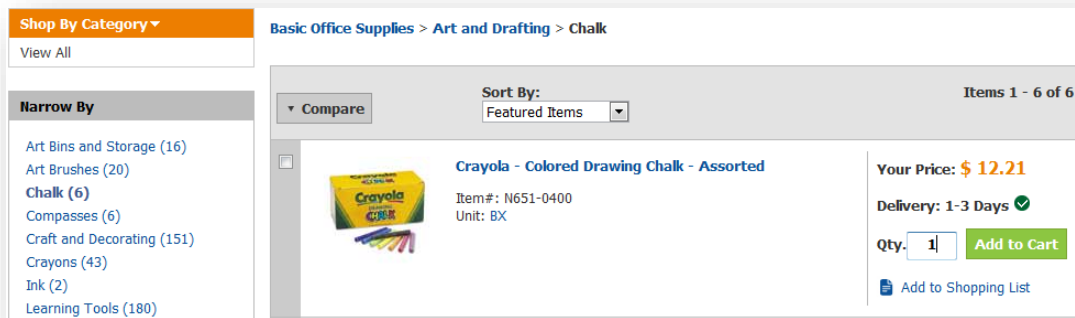
The various Punchout catalogs have different looks and feels. Shoppers should practice using the search features on the various sites as well as the functionality for adding items to a cart, viewing a cart, editing a cart, saving a cart, etc.

Some Punchout sites, such as OfficeMax, have a Shopping List or Favorites feature that allows the Shopper to set up lists of commonly used items that can be accessed later for quick shopping. To access the Shopping List in the OfficeMax catalog first click on **Create New Office Product Order**.

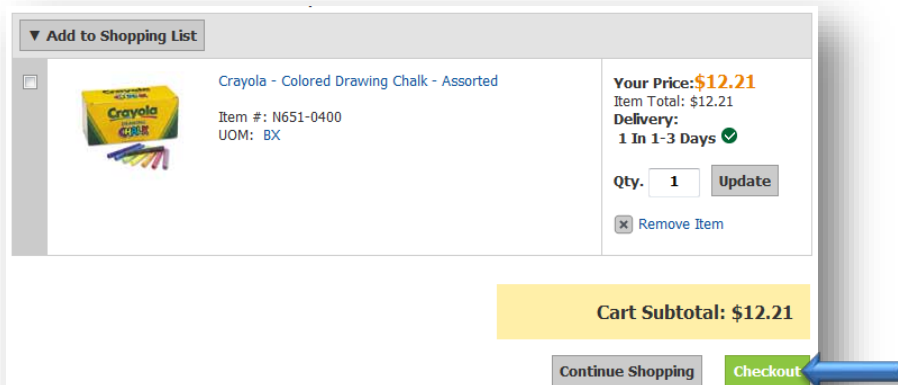


You can order by Category, Item number, or from a Shopping list. There are existing Shopping lists created by OfficeMax or you can create your own.

Select your items and quantity you wish, then click, **Add to Cart**



Once you have all the items you need, click **Checkout** to return to eBuy.





Prior to assigning the cart to the Initiator, the Shopper may click on **Internal Note** to advise funding information for the purchase or to add any other pertinent information that needs to be conveyed to the Initiator/Requester. The Shopper may also enter a cart **Description** and/or new **Cart Name** if they wish. Renaming the cart may facilitate locating the cart if the Shopper needs to search for it at a later time.

Shopping Cart for Julie A. Bergeon

Proceed to Checkout or Assign Cart

Save

Cart Name: 2013-08-28_jbergeon 01

Description: [Empty]

Original Submitter: Julie A. Bergeon

Requester/Initiator: Julie A. Bergeon

Internal Note: add note...

Note to all Suppliers (Note: add note...): These comments are often discarded by supplier and may slow down the processing of this order.

Supplier / Line Item Details

Show line details For selected line items Add To Favorites Go

OfficeMax more info...

Fulfillment Address edit
800 West Bryn Mawr Ave, Itasca, IL 60143 AL

The item(s) in this group was retrieved from the supplier's website. What does this mean?
Need to make changes? MODIFY ITEMS | VIEW ITEMS Item(s) was retrieved on: 10/7/2013 11:55:13 AM

Line(s): 1

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Crayola - Colored Drawing Chalk - Assorted	N651-0400	BX	12.21	1 BX	12.21 USD
Supplier subtotal					12.21USD

To return to the supplier's website to modify or add the items in the cart click on **MODIFY ITEMS**

Items can be removed from the cart at this point by clicking on the **Select** box, choosing **Remove Selected Items** in the drop down menu, and clicking on **Go**.

When all edits are completed click Save. Shoppers who do not have an Initiator or Requester role will be required to assign their cart to their department Initiator/Requester by clicking **Assign Cart**.

For selected line items Add To Favorites Go

- Add To Favorites
- Remove Selected Items
- Remove All Items
- Move to Another Cart
- Add to Draft Cart

Shopping from a Hosted Catalog

To search for items in Hosted catalogs click on the logo for the vendor. Searches can be typed in the Search box or conducted using various criteria including, Categories of items, Descriptions, Manufacturer Names, Catalog #'s etc., using the Categories link

New England Bio Labs example

Categories

Category Search

- Biochemical Compounds view (incl. sub-categories)
- Cell Biology view (incl. sub-categories)
- Chemical Reagents view (incl. sub-categories)
- Electrophoresis view (incl. sub-categories)
- Laboratory Equipment view (incl. sub-categories)
- Molecular Biology view (incl. sub-categories)

Click the category or **view**

to see the products in that category.

Lab Supplies

Fisher Scientific Standard Free Shipping

VWR INTERNATIONAL

BIO-RAD

NEW ENGLAND Biolabs

PerkinElmer

QIAGEN

New England Biolabs Incorporated view info...

Search

Categories



A list of products for that category from the Hosted catalog will be displayed. From this page the Shopper can select the item or items they wish to purchase. Click the **Sort by** drop-down to sort by price, description, size, etc.

Results for: Everything : New England Biolabs Incorporated + beads

Showing 1 - 20 of 22 results Compare Selected: 0

Results per page 20 Sort by: Best Match Page 1 of 2 ?

Oligo dT25 Magnetic Beads - 25 mg from New England Biolabs Incorporated	185.60 USD
Part Number S1419S	25mg, EA
Manufacturer Info S1419S - (New England Biolabs Inc (NEB))	<input type="text" value="1"/> Add to Cart ▼
	add favorite compare
SNAP-Capture Magnetic Beads - 2ml from New England Biolabs Incorporated	149.60 USD
Part Number S9145S	2mL, EA
Manufacturer Info S9145S - (New England Biolabs Inc (NEB))	<input type="text" value="1"/> Add to Cart ▼
	add favorite compare
Hydrophilic Streptavidin Magnetic Beads - 5 ml from New England Biolabs Incorporated	195.20 USD
Part Number S1421S	5mL, EA
Manufacturer Info S1421S - (New England Biolabs Inc (NEB))	<input type="text" value="1"/> Add to Cart ▼
	add favorite compare

Enter the desired Quantity for the items to be purchased and click on the **Add to Cart** button. Items can also be added to a Shopper's Favorites list by clicking on the **Add to Favorites** link below the individual item.

Results per page 20 Sort by: Best Match Page 1 of 2 ?

Oligo dT25 Magnetic Beads - 25 mg from New England Biolabs Incorporated	185.60 USD
Part Number S1419S	25mg, EA
Manufacturer Info S1419S - (New England Biolabs Inc (NEB))	<input type="text" value="2"/> Add to Cart ▼
	add favorite compare

To view the cart at any point in the shopping process, click cart icon in the upper right beside your name.

Julie A Bergeon ▾ ★ Action Items Notifications **1** 371.20 USD 🔍

My Cart 2013-10-08 jbergeon 01

	Oligo dT25 Magnetic Beads - 25... Quantity: 2 Price: 371.20 USD	<input type="button" value="View My Cart"/> <input type="button" value="Checkout"/>
--	--	--

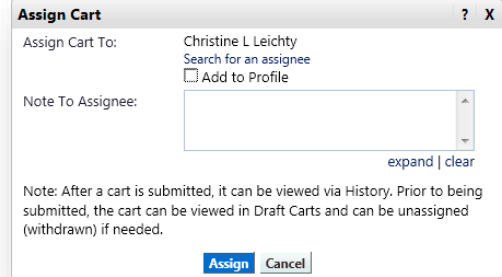
371.20 USD



Assigning a Cart - Shoppers

Shoppers will select an assignee either by choosing from a list of user defined profile values (previously determined Initiators appropriate for the department) or by searching for the appropriate name. After choosing the appropriate Initiator, click **Assign** and the cart # is assigned.

Note: It is very important that Shoppers know their primary and the secondary Assignees. These are the Initiators/Requesters for the Shopper's department. Setting the appropriate Assignees as profile values so that they can be selected from the drop down list will help to expedite the shopping carts and will also help ensure that the carts are sent to the appropriate person. To add an Initiator to the profile values list click Add to Profile after searching for and selecting the Initiator.



Place Order – Initiator/Requester

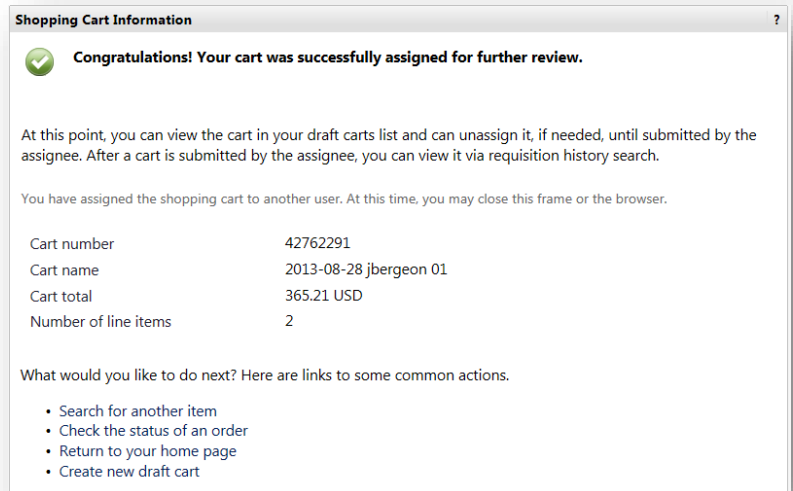
Initiators/Requesters have two options. To review and place order, click on **Proceed to Checkout**. You may also Assign Cart to another



After clicking Proceed to Checkout, you will need to click Place Order to

continue to PReqs. . The cart will be loaded to PReqs and assigned a Shopping Cart Order ID.

A screen will then display notifying the Shopper that their cart has been assigned.





Email Preferences

Shoppers can make changes to personal settings under the user name. To change email settings, click **Email Preferences**.

The option for receiving notification by email is not the default. You will need to change this next to “Assigned Cart Processed Notification”.

Click **Save** after making any changes.

Return to **PReqs** is also located under your name.

The screenshot shows the user interface for Julie A Bergeon. At the top, the user's name is displayed with a dropdown arrow. Below it, a dropdown menu is open, showing options: "View My Profile" (highlighted with a blue arrow), "Set My Home Page", "Return to PReqs", and "My Recently Completed Carts".


The main content area shows the "Email Preferences" page. The user's name and profile picture are at the top left. The page is divided into sections for different notification types:

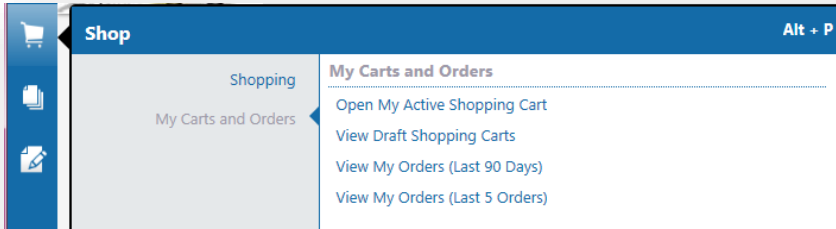
- Administration & Integration:** Search Result Export Confirmation (Email)
- Shopping, Carts & Requisitions:**
 - Prepared By - Cart Assigned Notice (None (Default))
 - Cart Assigned Notice (Email & Notification)
 - Assigned Cart Processed Notification (Email)
 - Assigned Cart Deleted Notification (None (Default))
 - Cart/PR rejected/returned (None (Default))
- Purchase Orders:**
 - Prepared By - PO Workflow complete (None (Default))
 - Prepared By - PO sent to Supplier (None (Default))
 - Prepared By - PO line item(s) rejected (None (Default))
 - Prepared By - PO rejected (None (Default))
 - eBuy Received PO - Pending Distribution (Email & Notification)
 - Supplier Received PO (Email & Notification)
 - PO Sent to Supplier (Email & Notification)
- Settlement:** Prepared By - PO Requires Receipt notice (None (Default))
- Contract Manager:** (No settings listed)

A "Save" button is located at the bottom right of the settings area.






Sending a Cart to PReqs


To access previous carts, click cart icon  on the sidebar to open active carts, review draft carts, or orders placed.



Shoppers can retrieve assigned shopping carts by clicking **Unassign**. This will bring the cart back to **My Drafts** for editing. Once a cart has gone to Workflow in PReqs it cannot be retrieved.

My Drafts Assigned to Others						legend ?
View Cart	Cart Number	Shopping Cart Name	Date Created	Assigned To	Total	Unassign
	42762291	 2013-08-28 jbergeon 01	8/28/2013	Christine L Leichy	365.21 USD	Unassign

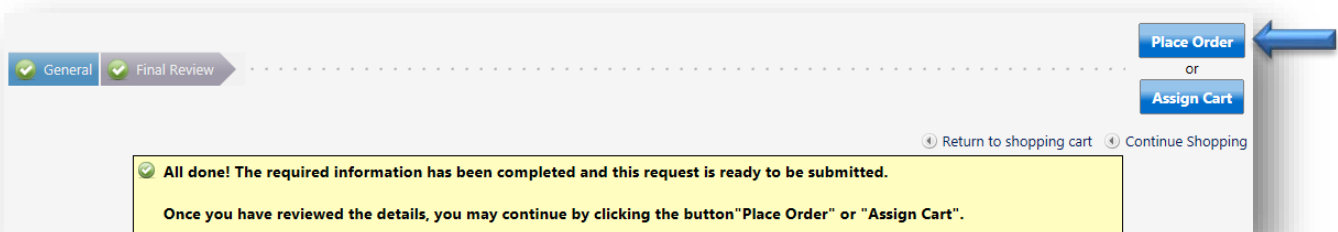
Click cart icon  and locate **Drafts Assigned To Me**. Click on **Shopping Cart Name** to access the cart.

Drafts Assigned To Me						legend ?
Active Cart	Cart Number	Shopping Cart Name	Date Created	Cart Description	Total	Delete
	42750669	2013-08-27 cleichty 01	8/27/2013		776.64 USD	Delete

Initiators/Requesters have two options. To review and place order, click on **Proceed to Checkout**. You may also Assign Cart to another



After clicking Proceed to Checkout, you will need to click Place Order to continue to PReqs. . The cart will be loaded to PReqs and assigned a Shopping Cart Order ID.





Approving a Cart in PReqs and Sending to Workflow

e-Pro
 e-Voucher PReq: eBuy ProTrav
 Order ID: EB42750669
 WF Tx#: -
 Date: 10-07-2013
 User: jbergeon
 Self Service / FO Logout
 PReqs
 Create Req
 Req Search Center
 Catalog Order Search
 Return to Order
 Copy Req
 Copy Order
 Find UI Contract
 Favorites
 Forms
 Purchasing Links
 Help Center
 Administration
 Message Center
 PO ID field
 Access to the tables
 Run jobs
 Archive
 Reports
 HawkID Admin
 Run Daily Tasks
 Error Report

eBuy Orders sourced from the Vendor:

Requester Information

Requester: Ship To:
 HawkID: JBERGEON Description: Bergeon,Julie PCO 202
 Location: PCO-202-22 Address: The University of Iowa Purchasing PCO-202
 Phone: 319-335-1726 Iowa City, IA 52242-2500
 Dept: Purchasing Phone: 319-335-1726
 Email: julie-bergeon@uiowa.edu Fax:
 End User:
 Phone:

[Edit/View eBuy Shopping Cart](#) (Click this link if you need to make changes to the line items).

Receiver Information

Receiver: Phone:
 HawkID: Dept:
 Location: Email:

[Apply this MFK to all lines.](#)

fund org dept sdept gmnt/prgm iact oact dact fn cctr slid slac
 add 050 05 0310 00000 50649100 6070 0000 00000 60 0000

Header Comments that will default to all lines

OfficeMax [More Info](#)
 Business Justification for This Purchase:

[Edit/View eBuy Shopping Cart](#)

#	Product Description	Catalog No	Size / Packaging	Qty	UOM	Unit Price	Ext. Price
1	OfficeMax - Slash-Pocket Folders - 8-1/2 x 11 , Assorted, 2 More Info	F10M01937		2.0	PKG	\$ 11.31	\$ 22.62
	fund org dept sdept gmnt/prgm iact oact dact fn cctr slid slac mfk amt						
	050 05 0310 00000 50649100 6070 0000 00000 60 0000 \$22.62						

Line Comments Due Date: 10/07/2013

Est. Shipping: \$0.00
 Supplier Subtotal: \$22.62

Order Total: \$ 22.62

Add End User Phone, Receiver, and appropriate MFK to each line or enter one MFK to be applied to all lines.

Verify the following fields and edit if necessary:

- Requester
- Ship To Location
- End User Name
- Due Date
- MFK (Multiple MFK's can be entered for each item if desired)
- Line Comments
- Vendor Comments
- Internal Comments
- Enter End User Phone.

The Initiator's Requester will default. If the Initiator is associated with more than one Requester, select the appropriate Requester name from the drop down menu. Line item information cannot be edited. Click on [Edit/View eBuy Shopping Cart](#) to return to the shopping cart in eBuy to change item information.

Note that some Punchout suppliers will not allow changes at this point.

Once all information has been verified, click **Send to Workflow** at the bottom of the panel. Once Send to Workflow has been clicked no more changes can be made to the order.

Choose the appropriate Workflow path and click **Continue** until routing is complete.

ORG / DEPT SUBLEVEL

VPFO-Purchasing 09030-SW/MC

VPFO-Purchasing eBuy_testing

Finish Workflow Routing

You have approved this form; it will proceed through the workflow system.

To return to the Web Purchase Requisition / E-Voucher System, please click [here](#).

The panel shown above will be displayed.

The PReq will then go to the inbox of the first PReq approver. After all departmental approvers review and approve the PReq it will either upload to PeopleSoft (if less than \$10,000 and not capital equipment) or route to the Purchasing Agent (if \$10,000 or more or capital equipment) for final approval. If PReq is routed to a PA it will upload to PeopleSoft



after their approval. When the PReq uploads to PeopleSoft a Purchase Order is created and dispatched to the supplier electronically by Sciquest.

If the Shopping Cart contains items from more than one Supplier a separate PReq will be established for each Supplier. After choosing the Workflow path for the first PReq, the Initiator must send the remaining PReqs to Workflow. Click on the link:

To return to the Web Purchase Requisition / E-Voucher System, please click [here](#). You will then be returned to Workflow to choose the path for the next PReq associated with your cart. Once all PReqs have been sent to Workflow, clicking on the link will return the Initiator to the Shopping Cart.