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User Settings

Set email Preferences

In order to receive email notifications as carts progress through the approval process and/or to receive notifications when carts are assigned to them, Users need to set their email preferences accordingly.

To set email preferences click on **View My Profile** under your name in the upper right. Then click on Email Preferences under **User Information and Settings**. Click the box next to each notification that is desired then click **Save**. These preferences can be changed at any time.

The screenshot displays the eBuy user interface. At the top, a navigation bar shows the user's name 'Julie A Bergeon' with a dropdown arrow, followed by 'Action Items' with a red notification icon and 'Notifications' with a red notification icon. Below this, a dropdown menu is open, showing options: 'View My Profile' (highlighted), 'Set My Home Page', 'Return to PReqs', and 'My Recently Completed Carts'. To the right, the 'My Profile' page is visible, showing the user's name 'Julie A Bergeon', email 'jbergeon', and status 'Active'. Below this, the 'My Profile' section is expanded, showing 'User Information and Settings' with a list of options: 'User's Name, Phone Number, Email, etc.', 'Custom Field and Accounting Code Defaults', 'Default Addresses', 'Language, Time Zone and Display Settings', 'Email Preferences' (highlighted), and 'Show All...'. The 'Email Preferences' form is also shown, featuring a blue banner at the top stating 'The application notifications are not yet enabled for all items.' The form is organized into sections: 'Administration & Integration' (Search Result Export Confirmation set to Email), 'Shopping, Carts & Requisitions' (Prepared By - Cart Assigned Notice set to None (Default), Cart Assigned Notice set to Email & Notification, Assigned Cart Processed Notification set to Email, Assigned Cart Deleted Notification set to None (Default), and Cart/PR rejected/returned set to None (Default)), 'Purchase Orders' (Prepared By - PO Workflow complete, Prepared By - PO sent to Supplier, Prepared By - PO line item(s) rejected, and Prepared By - PO rejected all set to None (Default); eBuy Received PO - Pending Distribution, Supplier Received PO, and PO Sent to Supplier all set to Email & Notification), 'Settlement' (Prepared By - PO Requires Receipt notice set to None (Default)), and 'Contract Manager'. A 'Save' button is located at the bottom of the form.

Julie A Bergeon

View My Profile

Set My Home Page

Return to PReqs

My Recently Completed Carts

My Profile

Julie A Bergeon

jbergeon

Active

My Profile

User Information and Settings

User's Name, Phone Number, Email, etc.

Custom Field and Accounting Code Defaults

Default Addresses

Language, Time Zone and Display Settings

Email Preferences

Show All...

Email Preferences

The application notifications are not yet enabled for all items.

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)

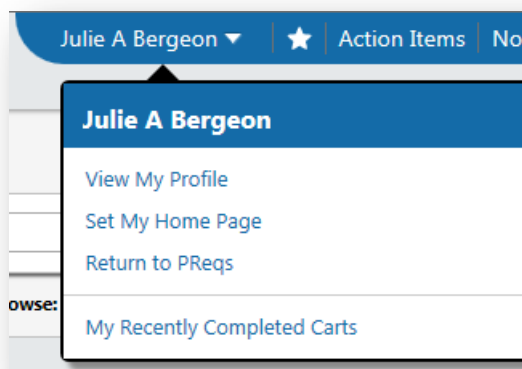
Contract Manager

Save

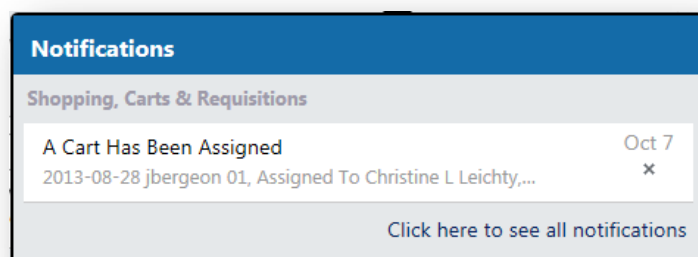




Action Items and Notifications

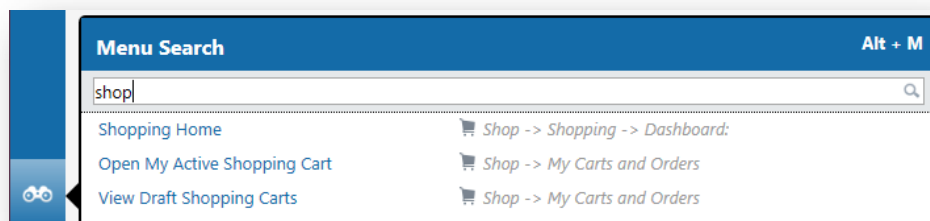
In the upper right corner of the screen it will show info on your recent carts, action items, and notifications.



Click the red box to see the message.



At any time you need help, click the  for a pop-up screen for all topics. You can also click the  in bottom left to search the menu if you get lost.



Personalize Carts

Change Cart Name and Description

Shoppers may find it helpful to rename shopping carts in order to facilitate searching for them later. Any naming convention can be used. Typical components are Cart Date, Supplier, Shopper, and Cart #.



To rename a cart click in the **Cart Name** field, delete the system assigned name, enter the new name. Add a description if you like and click **Save**.

Set an eBuy Favorites

Set Favorites in a Punchout Catalog

Most Punchout catalogs have functionality that allows Shoppers to set personal Favorites or Shopping Lists within their sites. The OfficeMax functionality is shown as an example. Documentation for other Punchout sites are available on the eBuy Training page under the Supplier Catalog section.

To set up a Shopping List in the OfficeMax catalog click on **Manage Shopping Lists** in the sidebar on the OfficeMax punchout web site.

The screenshot shows the OfficeMax Workplace interface. On the left, there is a sidebar with a 'Shopping' section containing links: 'Create New Order', 'Saved Orders', 'Repeat Orders', 'Manage Shopping Lists' (highlighted with a yellow box), and 'Browse Catalog Only'. Above this sidebar are two tabs: 'Manage Orders' and 'Your Profile'. The main content area is titled 'Manage Orders' and includes a greeting 'Hello, Julie A Bergeon.' and a section 'Updates & Action Items' with the text 'There are no items requi'. To the right of the main content area, there is a 'Manage Shopping Lists' panel with a 'Create New List' link, filter options 'All | Personal | Shared', and the message 'No shopping lists found.'

Click on **Create New List**



eBuy Features and Special Processes Preferences, Favorites, Delegates, and Carts

Enter a name for your list in the **List Name** field.
Add a Category and sort criteria. Click **Continue**.

Create New Shopping List

List Name
My Office Supplies

List Type
☒ Personal

Account
0439418 - University of Iowa-Special Pricing

Add Category
Desk Supplies
Categories are used to organize your shopping list. More can be added later.

Sort items within categories by: [Examples]
☐ Abbreviated Description
☐ Full Description
☐ Product Code
☐ Customer Item #
☒ Entry Sequence

Continue **Reset to Defaults**

Shop By Category

Appliances & Accessories

Basic Office Supplies

Binders & Filing

Breakroom Supplies

Calendars & Organizers

Cleaning Chemicals

Cleaning Supplies & Equipment

Computer Accessories & Supplies

Computer Hardware & Peripherals

Order by Item

Add Items to This Category Desk Supplies **Add**

Art and Drafting (645)

Bags and Cases (540)

Books and Reference (189)

Cash Handling and Bank Supplies (222)


Clipboards (83)

Clips and Fasteners (256)


Copy Holders (34)

Desk Accessories (722)

Shop by Category, make a selection, and **Add to Shopping List**

 **OfficeMax - Two-Tone Mesh Collection - Drawer Organizer - Black, 14-15/16" x 11-13/16" x 2-3/8"**

Customer Item#: K322131
Item#: K3OM96839
Unit: EA

Your Price: \$ 9.70 

☒ **Add to Shopping List**

Add items to the list as desired.

Edit - My Office Supplies

1 item was added to this list

Account: 0439418 - University of Iowa-Special Pricing

Items Sorted By: Entry Sequence

Modified On: 10/08/2013 03:37 PM

Continue Shopping Items 1 - 1 of 1

Category: Desk Supplies [Rename](#)

Remove **Move** **Move Selected Items to this Category**

UOM	Item #	Description
<input type="checkbox"/> EA	Customer Item#: K322131 K3OM96839	OfficeMax - Two-Tone Mesh Collection - Drawer Organizer - Black, 14-15/16" x 11-13/16" x 2-3/8"



eBuy Features and Special Processes Preferences, Favorites, Delegates, and Carts

To access shopping lists that have previously been set up click on the **Shopping Lists** tab, then on the list you wish to view.



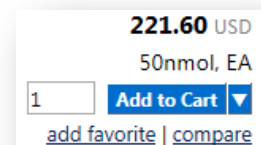
Shopping Lists

Filter By: **All** | Personal | Shared

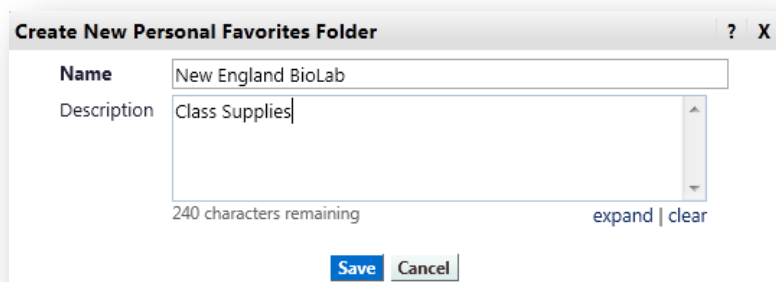
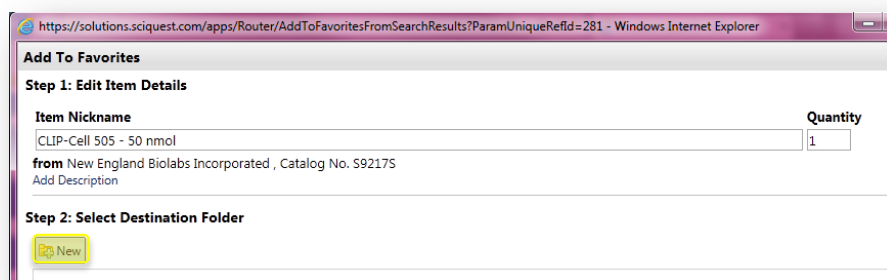
List Name	Date Last Changed	Type
\$U of I - Binders and Folders	08/10/2010	Shared
\$U of I - Computer Items and Electronics	05/31/2013	Shared
\$U of I - Furniture and Accessories	08/09/2010	Shared
My Office Supplies	10/08/2013	Personal

Set Favorites in eBuy (Hosted Catalog)

Shoppers can set personal Favorites on the eBuy web site for Hosted catalog items. Click on **add favorite** under the **Add to Cart** button of the Hosted Catalog.

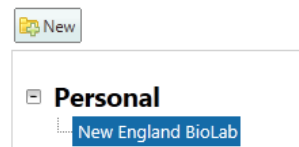


A pop-up window will display to create a new, personal or shared folder. Click the **New** button.



Enter a Name and Description, then click **Save**.

Step 2: Select Destination Folder

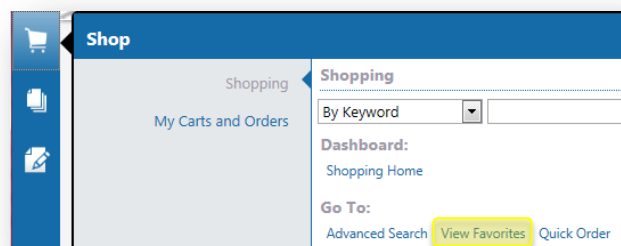


Click **Submit**. Product has been successfully added to Favorites.



eBuy Features and Special Processes Preferences, Favorites, Delegates, and Carts

To access your favorites, click the Shopping Cart, then **View Favorites**.



Assign Carts

Set Profile Values

Each department has Requesters and Initiators that their Shoppers will be required to send shopping carts to for approval. Shoppers should set the designated Initiator or Initiators as **profile values**. This will allow them to select their Initiator from a drop down list rather than having to search each time and will eliminate the possibility of a cart being assigned inadvertently to the incorrect Initiator.

After finalizing the cart and clicking on **Assign Cart**, the box shown below will be displayed. To set a specific initiator as a **profile value**, click on **Search for an assignee**.

Assign Cart ? X

Assign Cart To: Search for an assignee

Note To Assignee:

expand | clear

Note: After a cart is submitted, it can be viewed via History. Prior to being submitted, the cart can be viewed in Draft Carts and can be unassigned (withdrawn) if needed.

Assign Cancel

Enter the identifying information for the appropriate Initiator. At a minimum enter the person's Last Name. Click **Search**.

User Search

Last Name Leichty

First Name

User Name

Email

Results per page 10

Search

New Search Close

Results per page 10 Users meeting the search criteria: 1 Page 1 of 1 ?

Name	User Name	Email	Phone	Action
Leichty, Christine L	cleichty	chris-leichty@uiowa.edu	+1 (319) 335-0384	[select]

Click **Select**.



eBuy Features and Special Processes Preferences, Favorites, Delegates, and Carts

Click **Add to Profile**, then the **Assign** button.

The 'Assign Cart' dialog box shows the 'Assign Cart To:' field with 'Christine L Leichthy' selected. Below it is a search bar with 'Add to Profile' checked. The 'Note To Assignee:' field is empty. At the bottom, the 'Assign' button is highlighted.

In the future the Initiator can be selected by clicking on **Select from profile values**. A drop down box will display. Click on the down arrow. The Initiator can then be selected from a list of previously selected values.

The 'Assign Cart To:' field shows 'Christine L Leichthy' and 'Hide profile values'. A dropdown arrow is visible next to the name.

Or under **My Profile-User Information and Setting**, click **Cart Assignees**

The 'My Profile' page shows 'User Information and Settings' selected in the left sidebar. The 'Cart Assignees' link is highlighted in the right sidebar.

...and set Assignee as **Preferred**.

Cart Assignees

The 'My Cart Assignees' table shows one assignee, 'Christine L Leichthy'. The 'Set as Preferred' button is highlighted.

This Assignee will become your default.

Christine L Leichthy (Preferred Assignee)

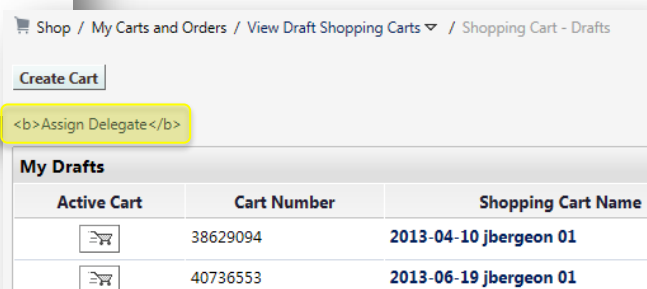
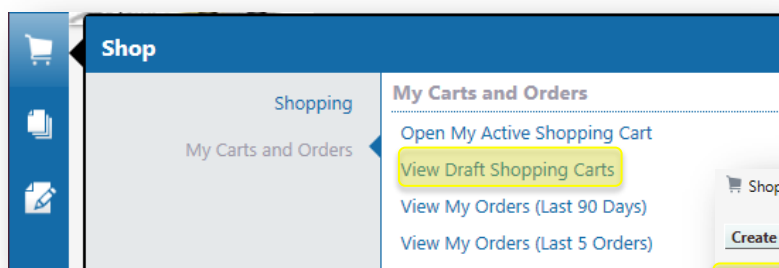
Assignees may also be deleted by clicking **Remove**.



Set Delegates

When Initiators/Requesters plan to be out of the office they should set a Delegate to receive and approve the shopping carts that are assigned to them in their absence. If a Delegate is not assigned, their carts will be inaccessible to other Initiators/Requesters who might be able to approve them. Delegates can be set for a short period of time (an afternoon, for example) or for an extended period of days, weeks, or months.

First, navigate to **My Carts and Orders > View Draft Shopping Carts**
Click **Assign Delegate**



Search for your Delegate and Select.

User Search

Last Name

First Name

User Name

Email

Results per page

Search

Results per page **Users meeting the search criteria: 1** Page 1 of 1 ?

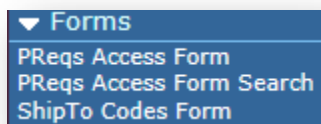
Name	User Name	Email	Phone	Action
Leichty, Christine L	cleichty	chris-leichty@uiowa.edu	+1 (319) 335-0384	[select]

Current Substitute: Christine L Leichty **End Substitution**

Substitute is set. Just click **End Substitution** to unassign.

Note: A user must be set up as an Initiator or Requester in PReqs before they can be set as a Delegate.

To add a new Initiator or Requester, click on the link to **PReqs Access Form** on the blue sidebar in the PReqs system, complete the form, and click on **Send to Workflow**.





Compare Items

When using the eBuy product search, users can elect to view similar products in a side by side comparison.

Note: Search results will include items from both Hosted catalogs and Punchout catalogs from suppliers who support searches in this field.

On the Home Shopping page, main search, select Lab Supplies and type **flowcell**. Click **Go**

Shop

Go to: [advanced search](#) | [favorites](#) | [quick order](#) **Browse:** [suppliers](#)

Click **compare** from the list displayed you wish to view.
Then, at the top of the list, click **Compare Selected**

Showing **1 - 20** of 135 results **Compare Selected: 3**

Order from Supplier

1UNIT, PK
[add favorite](#) | [remove](#) ✓

Order from Supplier

EA
[add favorite](#) | [compare](#)

The comparison is displayed. Click the checkboxes for the items you wish, and click **Go** to add to the active cart.

Add To Active Cart <input type="button" value="Go"/>			
Select	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Add to Cart			
Product Details	Flowcell-10mm Stainless Stl Lvl2; 1/PK N2922107	Flowcell 10.0mmz:8,5mm	Flowcell Type 584.4 1.0mm Path; 1/EA
Catalog No.	509044163	NC9625255	NC0394552

If no items from the Comparison were selected for a cart, click **<< Back to Search Results** to return to the product search.
If items were selected from a Punchout supplier, you will be required to punchout to order. If items were selected from a Hosted supplier, they will be added to your cart and proceed by placing order or assigning cart.

Working with Carts

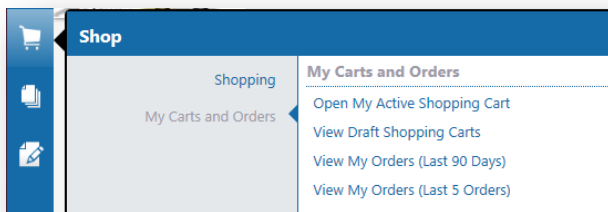
Un-assigning a Cart

Shoppers may at times need to retrieve shopping carts after they have been assigned to an Initiator/Requester. In eBuy this retrieval process is called “Unassign”. This may occur when an Initiator is out of the office and has not set a Delegate or when the Shopper needs to make a change to the cart.

Note: A Shopper cannot unassign a cart once the Initiator/Requester has approved it and sent it to PReqs. However, if a PReq has not yet been created, the Initiator may click on Edit/View eBuy Shopping Cart in PReqs to return to the cart in the eBuy system. At that point the Shopper can retrieve the cart by unassigning it.



To unassign a cart, navigate to **View Draft Shopping Carts**



Locate the **My Drafts Assigned to Others** section and click the **Unassign** button next to the cart that is to 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 Leichty	365.21 USD	Unassign	
	44010057	2013-10-08 jbergeon 01	10/8/2013	Christine L Leichty	635.10 USD	Unassign	

The cart will be returned to the Shopper. It can be edited at this point, if desired, and then re-assigned to the same, or a different, Initiator.

Delete a Cart in eBuy

A Shopper can only delete a cart in eBuy when it is in Draft status. At any point in the cart creation process, and prior to assigning the cart, the Shopper can save the cart as a Draft. They then have the option to return later to complete and assign the cart or to delete the cart if they choose to do so.

If a cart needs to be deleted after being assigned, the Shopper must retrieve the cart by unassigning it. See previous section. An Initiator/Requester can delete a cart that has been assigned to them prior to clicking **Place Order** and sending the cart to PReq. Once the cart has gone to the PReq system it cannot be deleted. Instead the Initiator must Submit the cart and then Void the resulting PReq.

Navigate to **View Draft Shopping Carts** and the **My Drafts** section. Click the **Delete** button next to the cart that is to be deleted. **Caution: Once the Delete button has been clicked, the cart cannot be reactivated.**

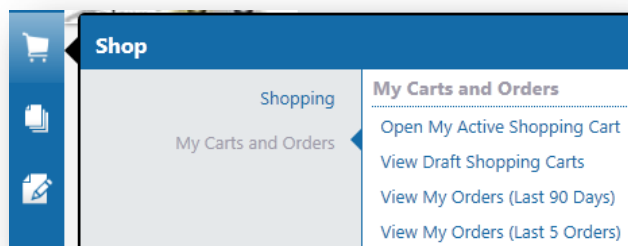
My Drafts							legend ?
Active Cart	Cart Number	Shopping Cart Name	Date Created	Cart Description	Total	Delete	
	42762291	2013-08-28 jbergeon 01	8/28/2013		365.21 USD	Delete	
	44060996	2013-10-09 jbergeon 01	10/9/2013		25.52 USD	Delete	



Copy a Cart

In eBuy it is possible to quickly reorder items by copying a previous cart to a new cart. Please note, however, that this functionality is not supported by all suppliers.

Open the **View My Orders**, either Last 90 Days or Last 5 Orders

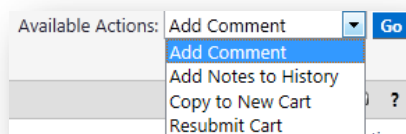


Click the cart number you wish to copy.

My Recent Carts		
Status	Cart No.	Cart Name
✓	15211482	2010-03-16 jbergeon 01

When the cart is displayed, under **Available Actions**, select

Copy to New Cart and click **Go**.



The items from the selected cart will be copied to a new cart. The new cart can be edited as needed, renamed, Internal Notes added, and assigned to the Initiator. Shoppers are cautioned that pricing may have changed since the original cart was created or require to punchout to reorder. They should always verify current pricing, and edit it as needed, before assigning the copied cart.



Move Items from One Cart to Another

eBuy also allows a Shopper to move selected items to a new cart without copying the entire previous cart. Search for, and select, the cart containing the item(s) to be copied following the procedure described in the previous section. Click the select box next to the item(s) to be moved. Select **Move to Another Cart** in the drop down menu and click **Go**.

Show line details

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: 10/9/2013 9:07:12 AM
Line(s): 1, 2

For selected line items

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

	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1	OfficeMax - Mesh Collection - Pencil Cup - Black, 3-9/16 x 3-15/16 more info...	K3OM96866	EA	3.06	2	EA 6.12 USD	<input checked="" type="checkbox"/>
2	OfficeMax - Two-Tone Mesh Collection - Drawer Organizer - Black, 14-15/16 x 11-13/16 x 2-3/8 more info...	K3OM96839	EA	9.70	2	EA 19.40 USD	<input checked="" type="checkbox"/>

eBuy will verify the cart you wish to move the items to.

Please select the appropriate cart to which the selected line items(s) are to be moved.

Move to new cart ?

Select	Shopping Cart Name
<input type="radio"/>	Move to new cart

Draft Cart ?

Select	Shopping Cart Name
<input type="radio"/>	2013-10-09 jbergeon 01 (44060996)

Move

The items from the selected cart will be moved to a new cart or a cart specified. It can be edited as needed, renamed, Internal Notes added, and assigned to the Initiator.

Remove Items from a Cart

Items can be removed from draft shopping carts either individually or all at once and works the same way as moving items.

Show line details

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: 10/9/2013 9:07:12 AM
Line(s): 1, 2

For selected line items

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

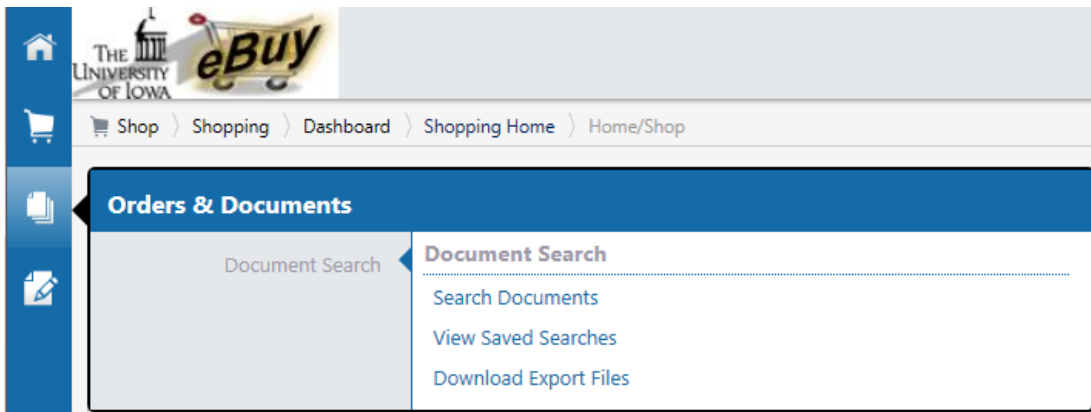
	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1	OfficeMax - Mesh Collection - Pencil Cup - Black, 3-9/16 x 3-15/16 more info...	K3OM96866	EA	3.06	2	EA 6.12 USD	<input checked="" type="checkbox"/>
2	OfficeMax - Two-Tone Mesh Collection - Drawer Organizer - Black, 14-15/16 x 11-13/16 x 2-3/8 more info...	K3OM96839	EA	9.70	2	EA 19.40 USD	<input checked="" type="checkbox"/>



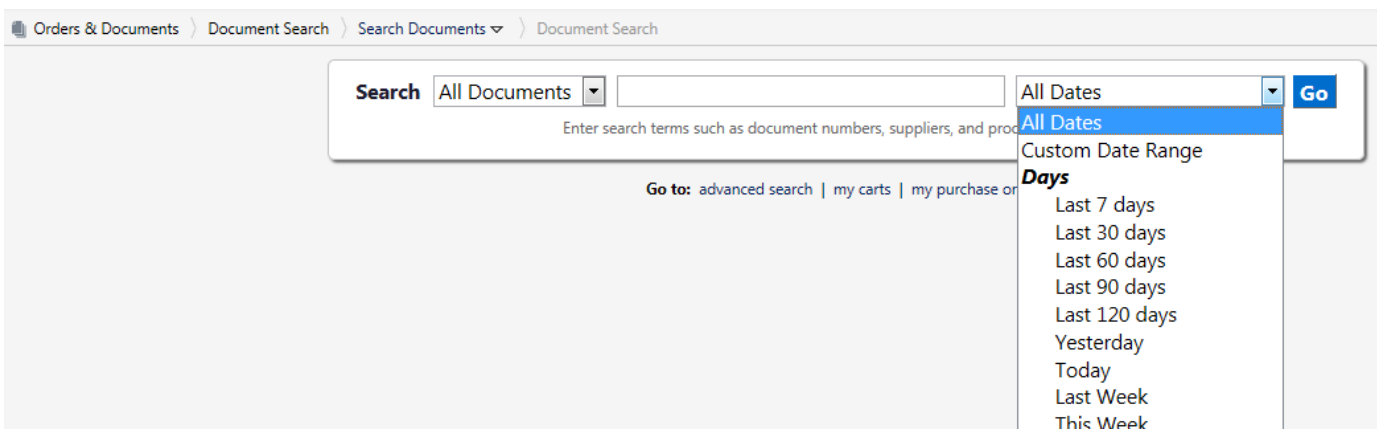
Search Orders and Documents

Search for all documents that the user has access to according to user profile permissions and document access permissions. Users can perform a simple search by looking for exact document numbers, partial document numbers and other keywords explained below.

Order and Document search provides a way to search for documents as well as the ability to search across multiple documents. eBuy Requisitions and Purchase Orders can be searched using this tool.



Click on **Search Documents**.



The search box will search for eBuy PReqs and POs with flexible date options.



Search Option and Features

Showing 1 - 2 of 2 results

All Dates

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

Document Number	Document Type	Document Owner	Document Date/Time	Supplier	Document Total
42750669	Requisition	Christine L Leichty	10/7/2013 4:34 PM	OfficeMax	22.62 USD
15211482	Requisition	Julie A Bergeon	5/24/2010 11:39 AM	OfficeMax	10.45 USD

Filtered By

Type: All Documents
Date Range: All Dates
Save Search Export Search

Refine Search Results

Type: All Documents
Date Range: All Dates
Department: No Department (2)
Owner: Christine L Leichty (1), Julie A Bergeon (1)
Supplier: OfficeMax (2)

Search can be date ranges or document types.
Or filter by Owner or Supplier

Advanced Search

Narrow down your search results ahead of time by pre-selecting what you wish to search. Advanced search can also be performed across all documents. Searching by custom fields now include ranges and starts with capabilities. This feature allows you to enter the Document Number, Owner, Supplier, and/or Catalog Number (SKU).

Orders & Documents > Document Search > Search Documents > Document Search

Search All Documents

Enter search terms such as document numbers, suppliers, and pr

Go to: advanced search my carts | my purchase

Item and Product information can also be added to your search.

Search All Documents simple search

Go

General Document Identification

Document Number(s)

Document Information

Participant(s)

Owner

Date: All Dates

Total Amount

Supplier

Item/Product Information

Catalog Number(SKU)

Product Description

Product Flags

☐ Controlled substance ☐ Energy Star
☐ Green ☐ Hazardous material
☐ Rad Minor ☐ Radioactive
☐ Recycled ☐ Select Agent
☐ Toxin

Go




Saving Document Searches

Document searches can be saved and re-run. For example, a user may want to see all of the open POs for his department at the beginning of each week. Searches can be saved using relative date ranges so that the date range doesn't have to be set every time you run a saved search. Click **Save Search** and give it a name. Saved Searches will display on your Document Search Home page or at the top of the search results page.

The diagram illustrates the process of saving a search. On the left, a 'Search Terms' form is shown with the keyword 'pocket folders'. Under 'Filtered By', 'Type' is set to 'All Documents' and 'Date Range' is 'All Dates'. The 'Save Search' button is highlighted. A blue arrow points from this button to a 'Save Search' dialog box on the right. The dialog box has two steps: 'Step 1: Edit Saved Document Search Details' with fields for 'Document Search Nickname' and 'Add Description', and 'Step 2: Select Destination Folder' with options for 'Personal' and 'Shared' folders.

After saving a search you can go back and edit the name and description of the search. To edit the parameters that you have saved, you can click the link to run the search and then make your edits and save the search again.

Quick View

Use the quick view icon  next to a search results document number. This will contain a next & previous link when accessed via the document search tab. It allows you to scroll through document search results without having to navigate back to the actual results.

The screenshot shows a 'Document Navigator Display' window. On the left, a sidebar indicates 'Showing 1 - 2 of 2 results' with a 'Results per page' dropdown set to 20. Below this, a table lists document numbers: 42750669 and 15211482, each with a quick view icon. The main area displays a 'Requisition Summary - 42750669' with navigation links '<Previous 1 of 2 Next>'. The summary is divided into 'General' information: Cart Name (2013-08-27 cleichty 01), Description, Original Submitter (Christine L Leichty), and Requester/Initiator (Julie A Bergeon).

My Purchase Orders

Within the document search tab, there is a link for **my purchase orders**. When the "my" option is selected, the user views a list of the last 90 days of eBuy PReqs and Purchase Orders. You will have the ability to modify the dates being searched or filter the data after the information is presented.

The screenshot shows the search interface. At the top, a search bar has 'Purchase Order' selected in the dropdown, a text input field, and 'All Dates' in the date range dropdown. A 'Go' button is next to it. Below the search bar, a link 'Go to: advanced search | my carts | my purchase orders' is shown, with 'my purchase orders' highlighted. On the right, a 'Search Terms' panel shows 'Owner' as 'Julie A Bergeon' and 'Filtered By' with 'Type' set to 'Purchase Order' and 'Date Range' set to 'Last 90 days'. Below this, a 'Refine Search Results' panel shows the 'Date Range' dropdown set to 'Last 90 days'.