IOWA

eBuy Processes

Table of Contents

Accessing eBuy 1

Enable Pop-Ups in eBuy 2

- Reset Session Timer 2

Shopping from a Punchout Catalog 3

Shopping from a Hosted Catalog 4

Assigning a Cart - Shoppers 6

Working with Carts 8

- Un-assigning a Cart 8
- Remove Items from a Cart 8

Place Order – Initiator/Requester 9

- Sending a Cart to PReqs 10
- Approving a Cart in PReqs and Sending to Workflow 11

Searching, Email Preferences and Setting Delegates 12

- Search Orders and Documents 12
- Email Preferences 13
- Set Delegates 14

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Accessing eBuy

eBuy is the University's web based market place. The market place hosts supply catalogs from 20+ different vendors covering a wide range of products. All of the vendors in eBuy have established contracts with the University and provide the best pricing solutions. eBuy streamlines the procurement process and allows staff to "fill a cart" with items then forward the cart to their departmental approvers for purchase. eBuy offers an entirely electronic process from procurement to payment, reducing redundant data entry and human error.

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 web site @ https://ap-purchasing.fo.uiowa.edu/purchasing/preqs/ebuy for further information.

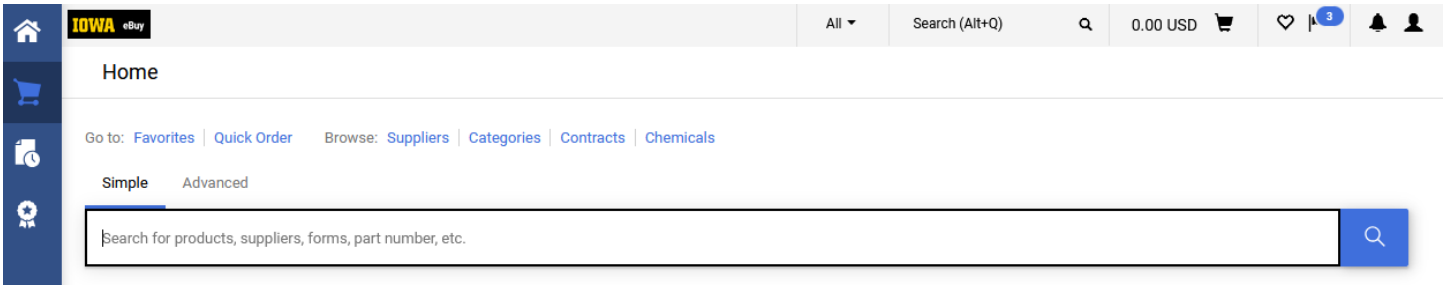
How to Access eBuy

1. Sign in to **Employee Self-Service**.
2. Navigate to **Business & Financial Systems**.
3. Click **ePro (eVouchers, Preqs/Receiving)**.
4. You will land on the **One Stop-eProcurement Page**.
5. Click **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.

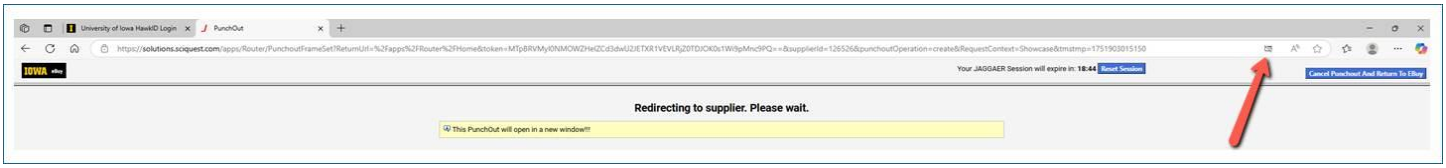
Select the Supplier you wish, or just search for what you're looking for.

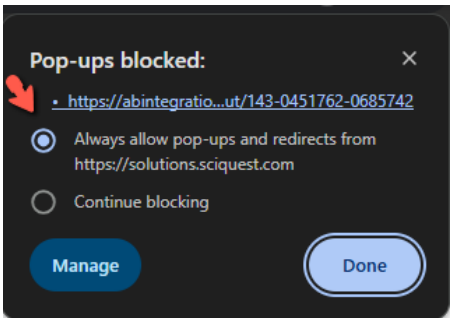


Enable Pop-Ups in eBuy

Some eBuy vendors open in a separate browser window (ie…Amazon) and you may need to enable pop-up windows. If this is the case, here are some instructions using Google Chrome browser to enable pop-ups.

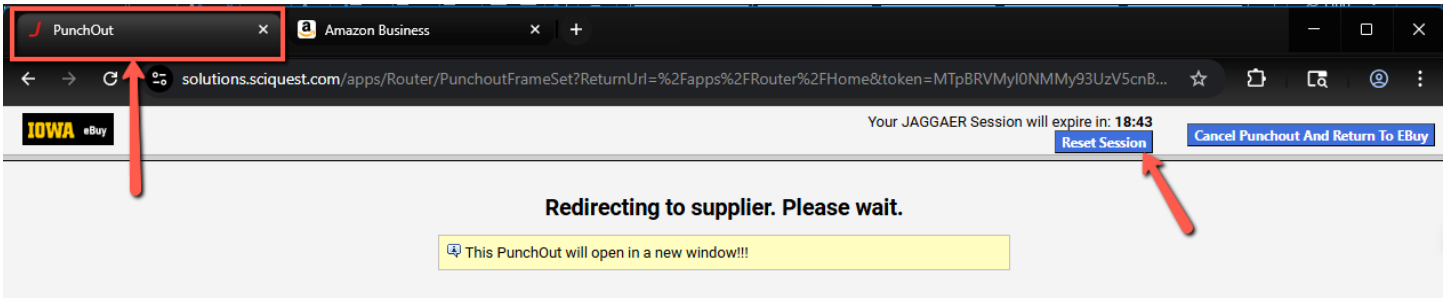
When you click on Amazon the Amazon punchout opens in a separate browser window. In the screenshot below, there is an icon in your URL bar that you can click on (see red arrow in the below screenshot). You should be able to enable pop-ups and redirects when you click on this icon. After doing this, try the Amazon punchout.





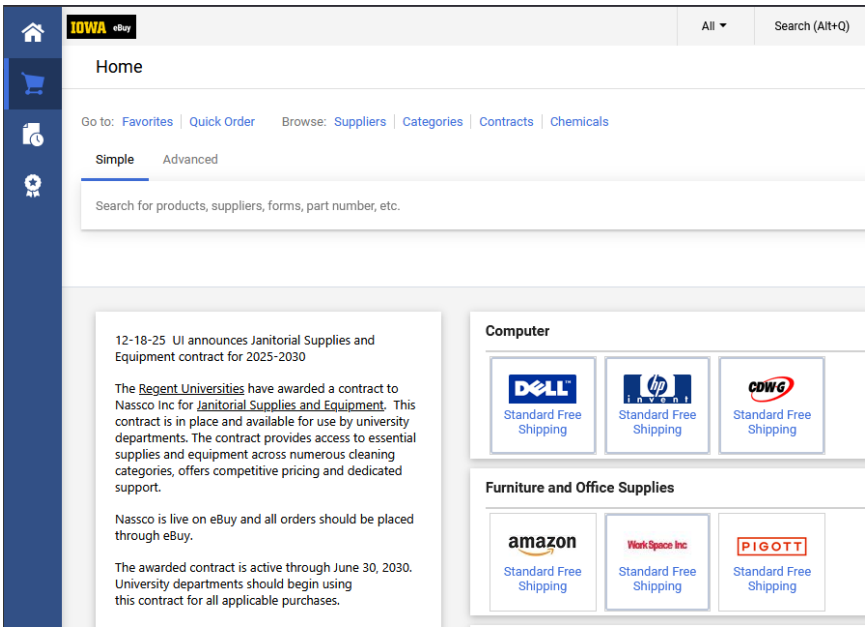
Reset Session Timer

Some eBuy Vendors open in a separate browser window (ie…Amazon). If you are going to be shopping longer than 20 minutes, you will need to click the "Reset Session" button in the original browser tab.



Shopping from a Punchout Catalog

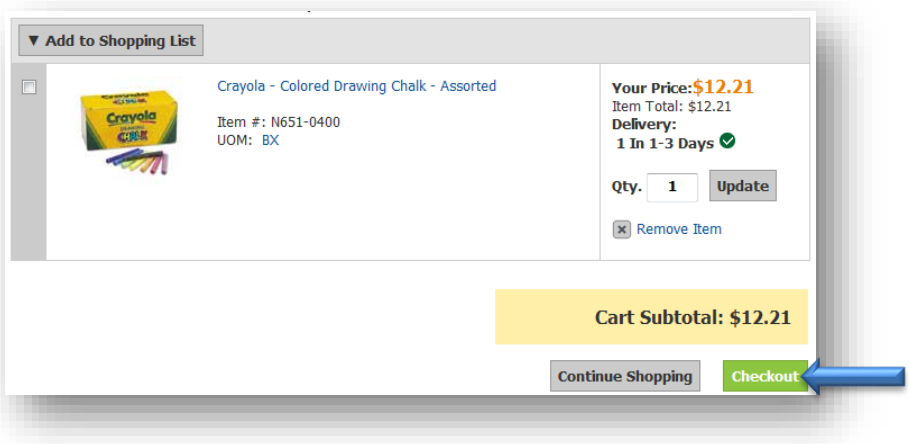
To search for items in a specific Punchout catalog, click the Supplier Logo in the **Home/Shop** section.



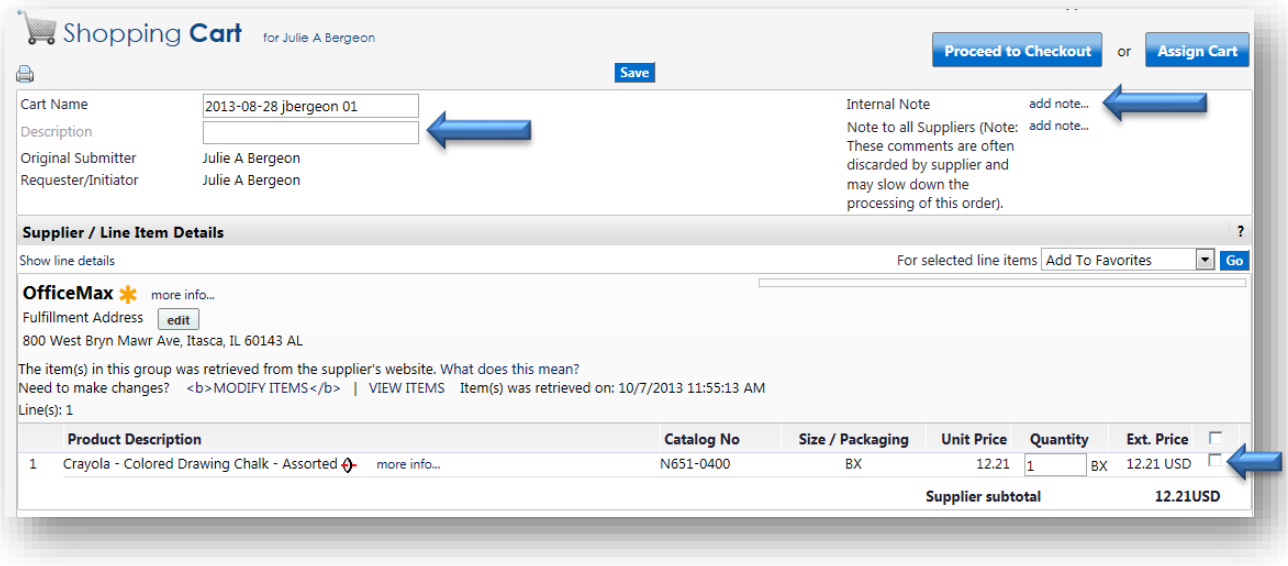
This will take the Shopper directly to the Supplier's catalog webpage. Note that the Shopper is, however, still in the University of Iowa eBuy system. It is possible to exit the Punchout catalog at any time and return to the eBuy Home page by clicking on **Cancel Punchout and Return to eBuy**. ***Note: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

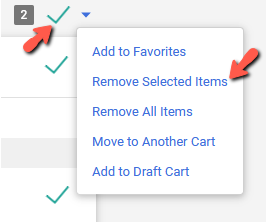
Once you have all the items you need, click **Checkout** to return to **eBuy.**



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.

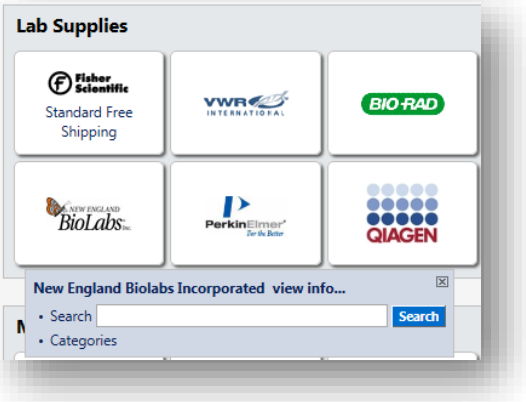


To return to the supplier's website to modify or add the items in the cart click on **MODIFY ITEMS**
Items can be removed from the cart at this point by clicking on the **Select** box, choosing **Remove Selected Items** in the drop down menu, and clicking on **Go**.
When all edits are completed click 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.**

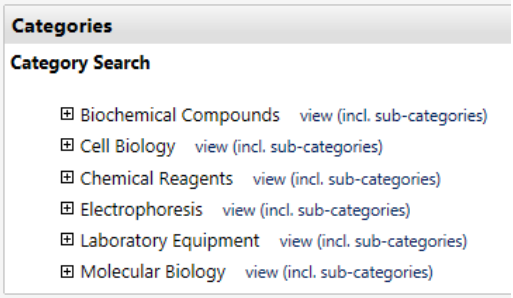


Shopping from a Hosted Catalog

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



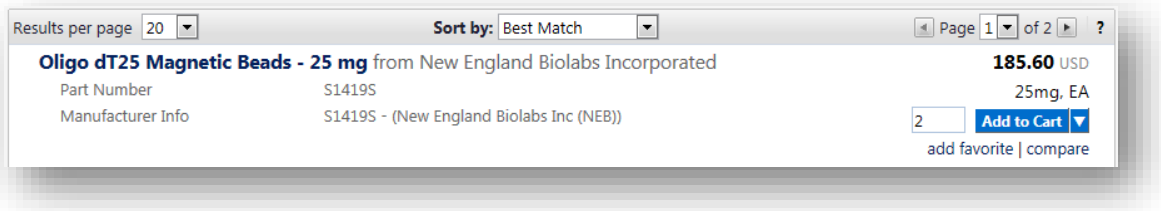
New England Bio Labs example



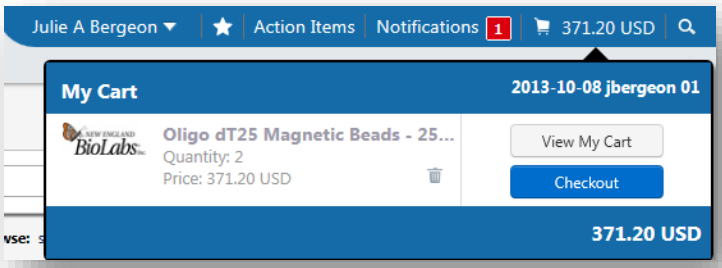
Click the category or **view**

to see the products in that category.
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.

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.



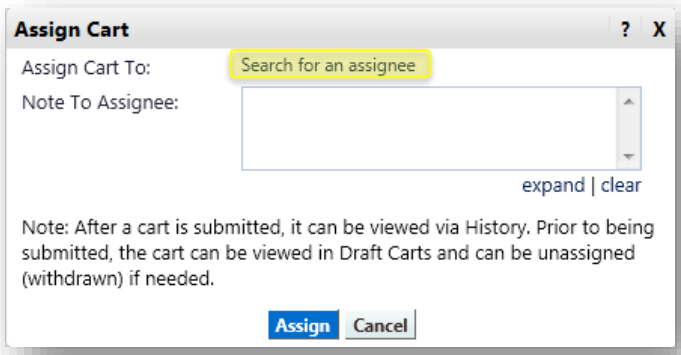
To view the cart at any point in the shopping process, click cart icon in the upper right beside your name.



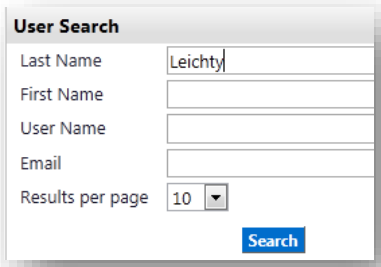
Assigning a Cart - Shoppers

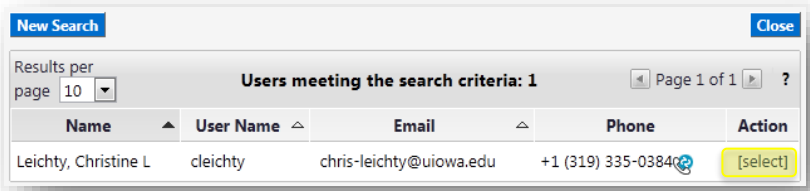
Each department has Requesters and Initiators that their Shoppers will be required to send shopping carts to for approval. Shoppers should set the designated Initiator or Initiators as **profile values**. This will allow them to select their Initiator from a drop down list rather than having to search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



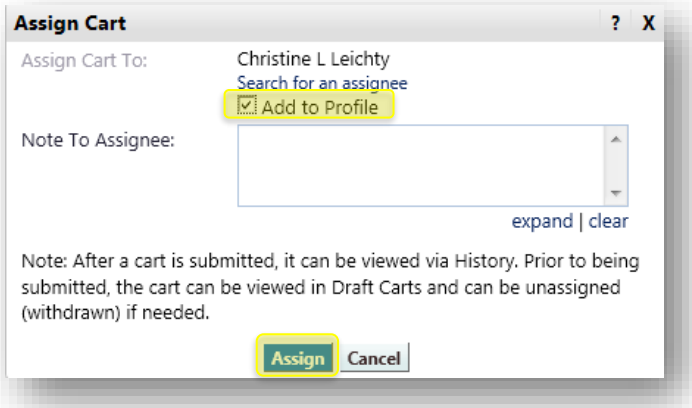
Enter the identifying information for the appropriate Initiator. At a minimum enter the person's Last Name. Click **Search**.



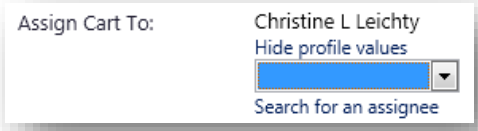


Click **Select.**

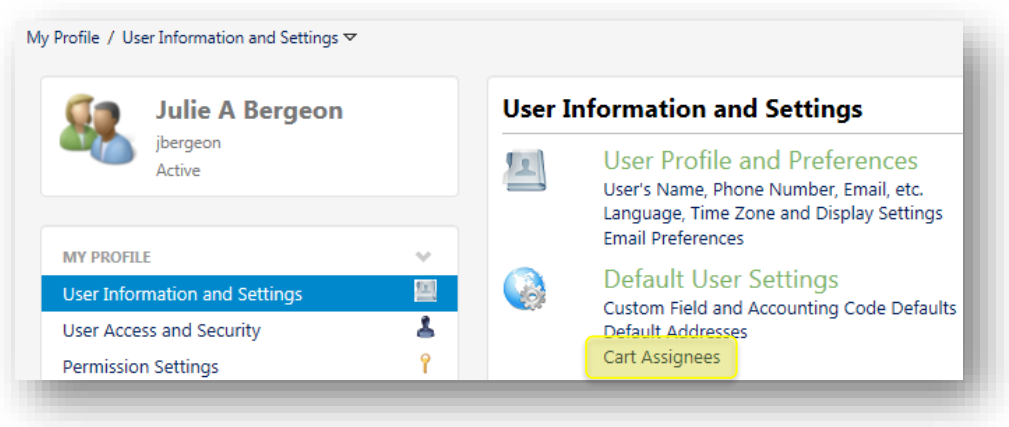
Click **Add to Profile**, then the **Assign** button.



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.

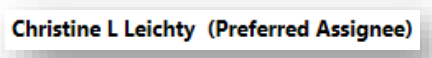


Or under **My Profile-User Information and Setting**, click **Cart Assignees**



…and set Assignee as **Preferred.**

This Assignee will become your default.



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

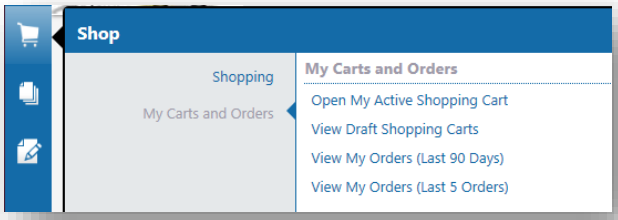
Working with Carts

Un-assigning a Cart

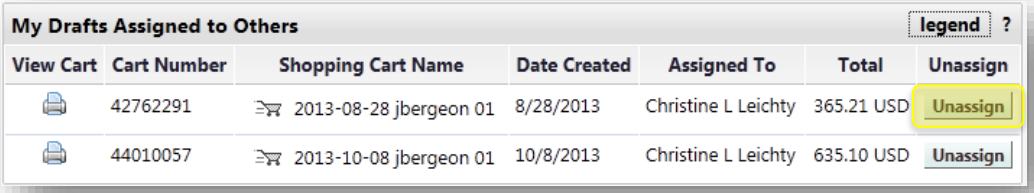
Shoppers may at times need to retrieve shopping carts after they have been assigned to an Initiator/Requester. In eBuy this retrieval process is called "Unassign". This may occur when an Initiator is out of the office and has not set a Delegate or when the Shopper needs to make a change to the cart.

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.



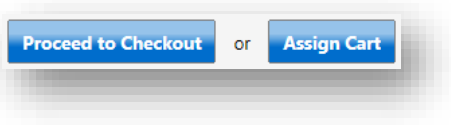
The cart will be returned to the Shopper. It can be edited at this point, if desired, and then re-assigned to the same, or a different, Initiator.

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.

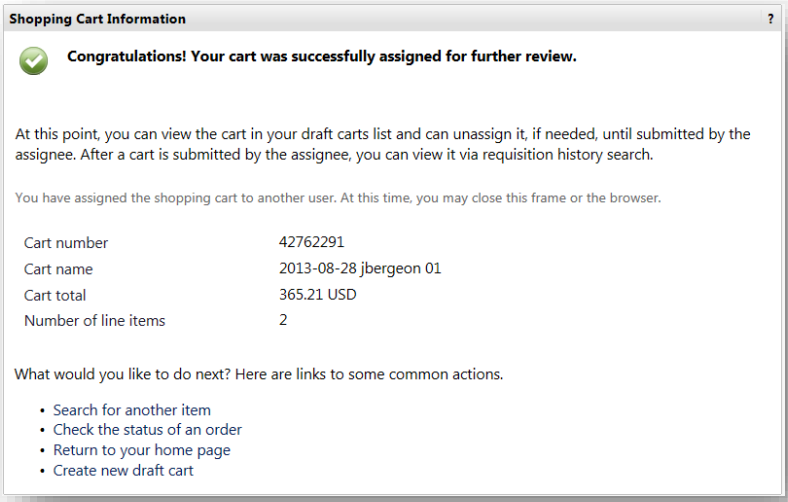
Place Order – Initiator/Requester

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



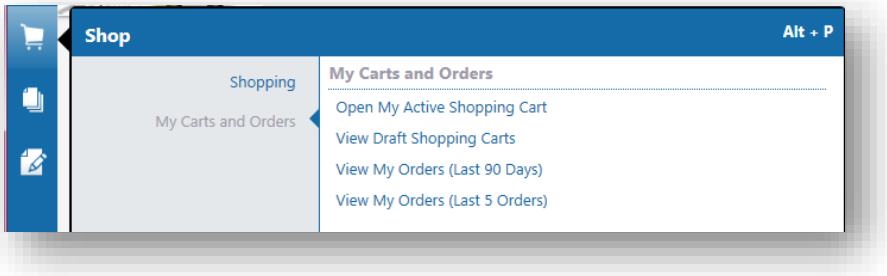
After clicking Proceed to Checkout, you will need to click Place Order to continue to PReqs. . The cart will be loaded to PReqs and assigned a Shopping Cart Order ID.

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

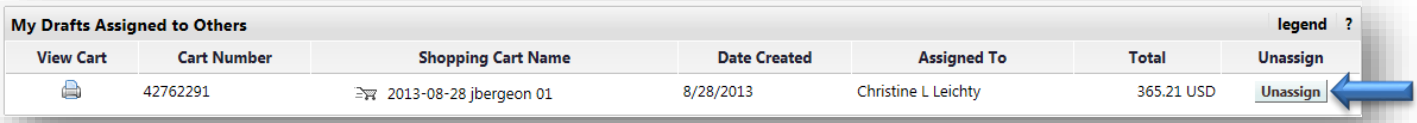


Sending a Cart to PReqs

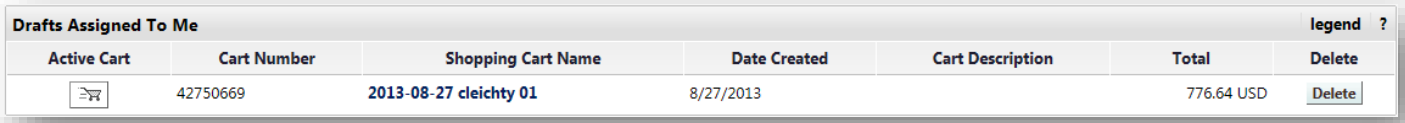
To access previous carts, click cart icon on the sidebar to open active carts, review draft carts, or orders placed.



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.



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



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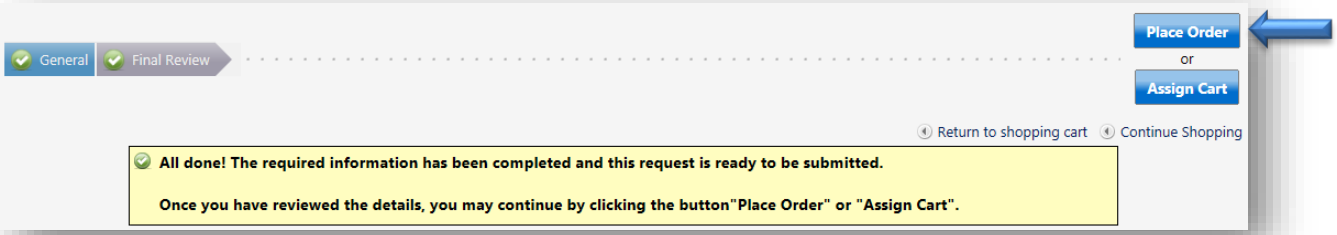
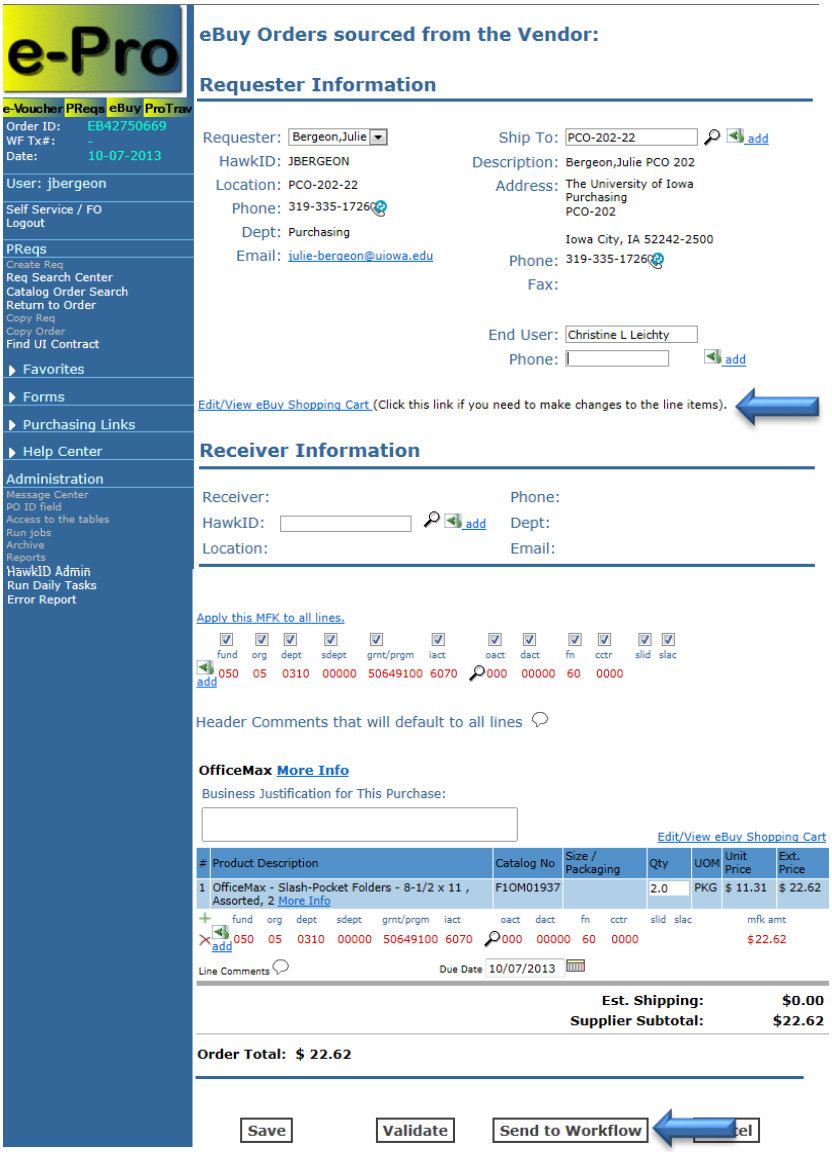


Approving a Cart in PReqs and Sending to Workflow



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.

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 $100,000 and not capital equipment) or route to the Purchasing Agent (if $100,000 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 Jaggaer.

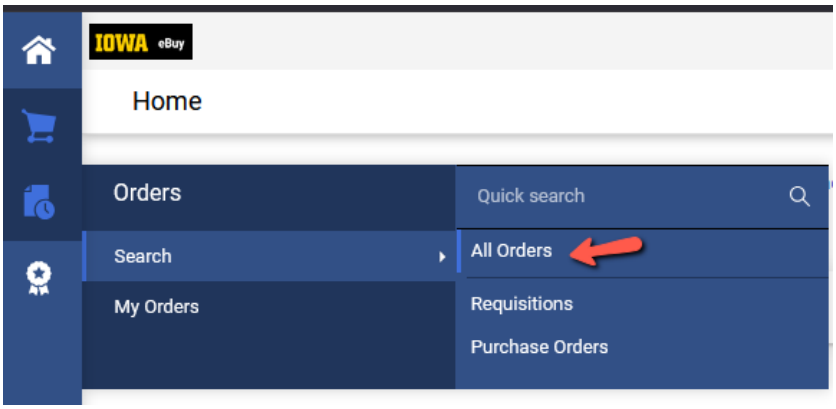
If the Shopping Cart contains items from more than one Supplier a separate PReq will be established for each Supplier. After choosing the Workflow path for the first PReq, the Initiator must send the remaining PReqs to Workflow. Check your Workflow Inbox to see if additional orders need to be sent to workflow for approvals.

Searching, Email Preferences and Setting Delegates

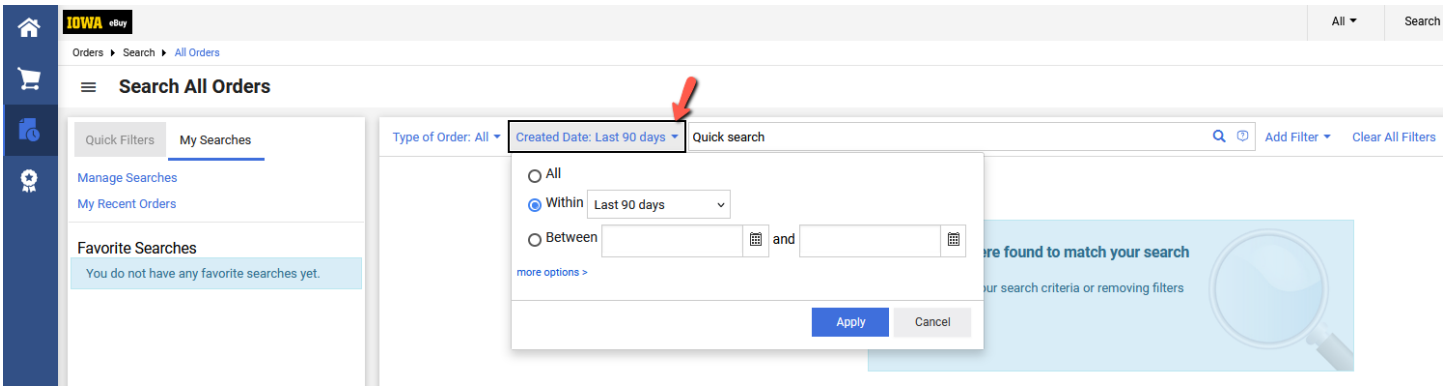
Search Orders and Documents

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.



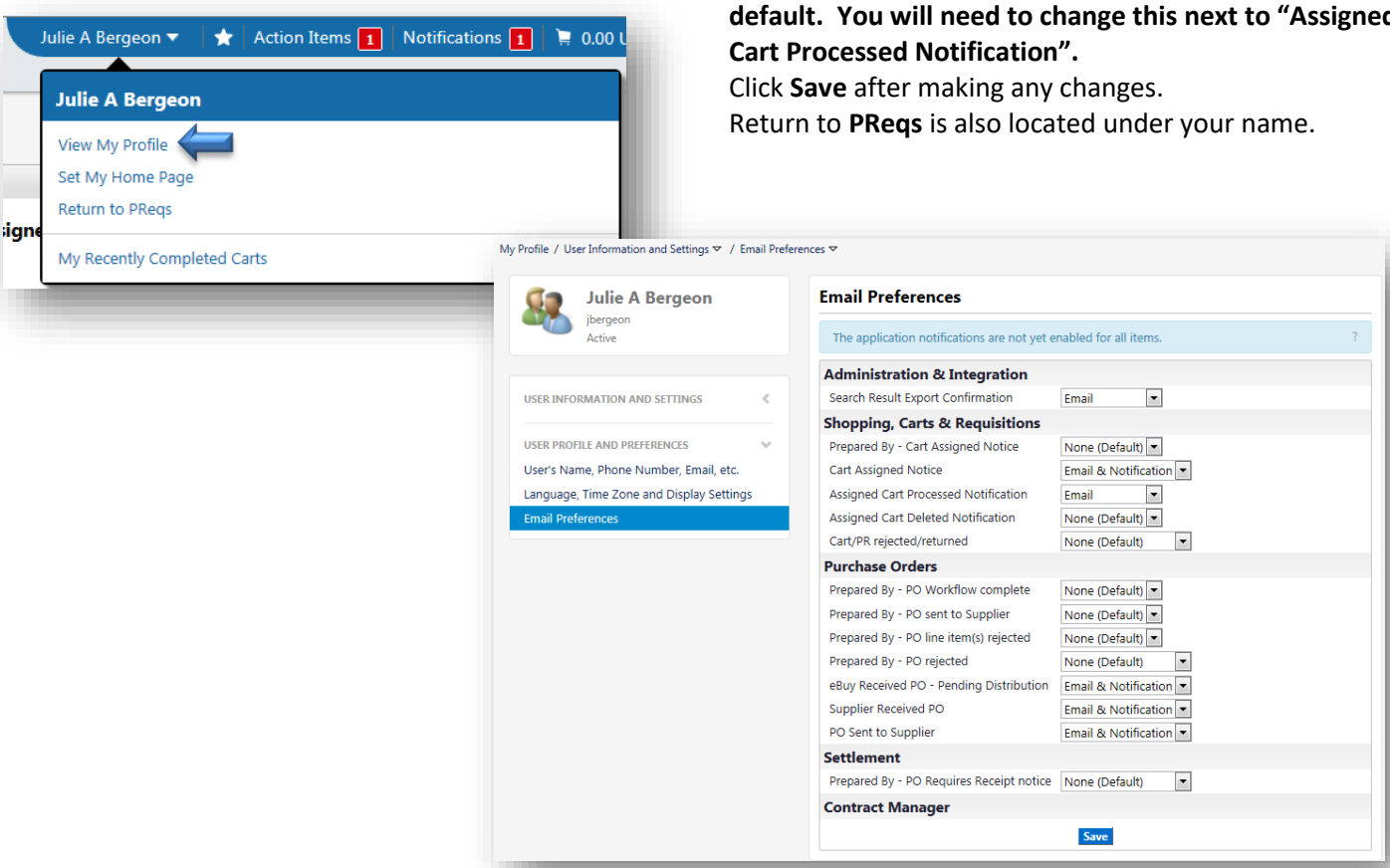
Click on **Search All Orders**.



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

Email Preferences

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



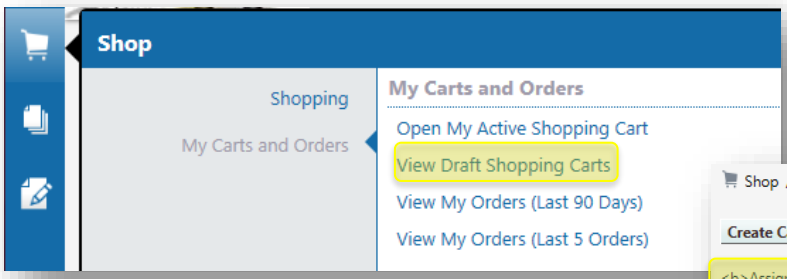
The option for receiving notification by email is not the default. You will need to change this next to "Assigned Cart Processed Notification".
Click **Save** after making any changes.
Return to **PReqs** is also located under your name.

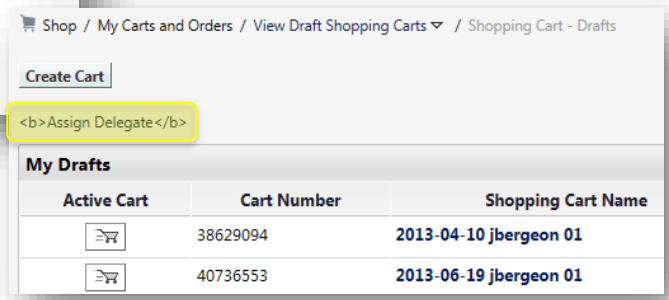
Set Delegates

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.

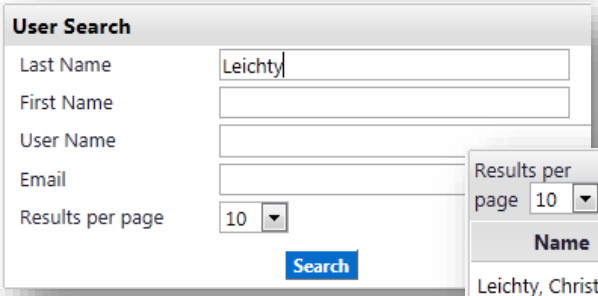
First, navigate to **My Carts and Orders > View Draft Shopping Carts**

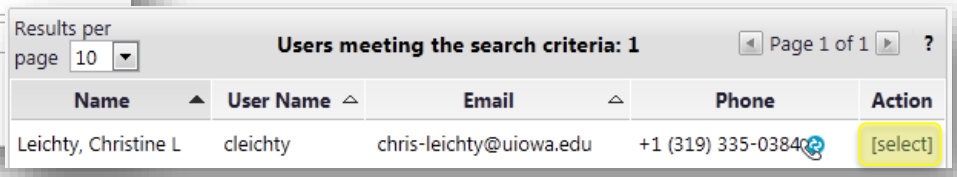
Click **Assign Delegate**

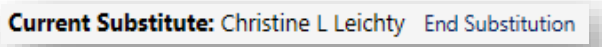




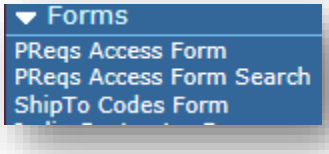
Search for your Delegate and Select.







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**.