buyLU

Purchasing Manual

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Introduction

I. Overview of buyLU Process

buyLU is the e-procurement (purchasing) system which Liberty University provides as a replacement for the Banner requisition process. It allows LU to:

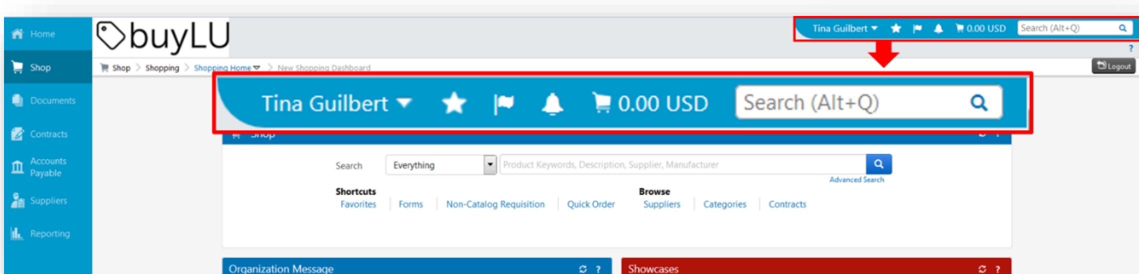
- Provide one-stop shopping
- Reduce time and effort in the purchasing process
- Select goods from online suppliers
- Secure better pricing of commonly used products
- Produce cost savings through the use of contract suppliers
- Increase efficiency with the use of central invoicing and electronic receiving
- Produce, in conjunction with Banner, accurate and more timely financial information

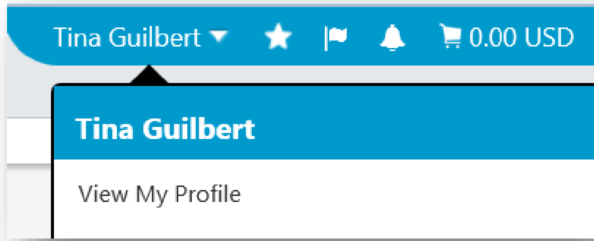
II. Creating and Managing Your User Profile

Each Liberty user has a "personalized" profile. Some profile information is automatically set up; however, other features must be set up by the User prior to using buyLU for the first time.

At the top right-hand corner of the homepage you will find your name. Beside your name is a drop down arrow.

Click on the drop down arrow and select "**View My Profile**".



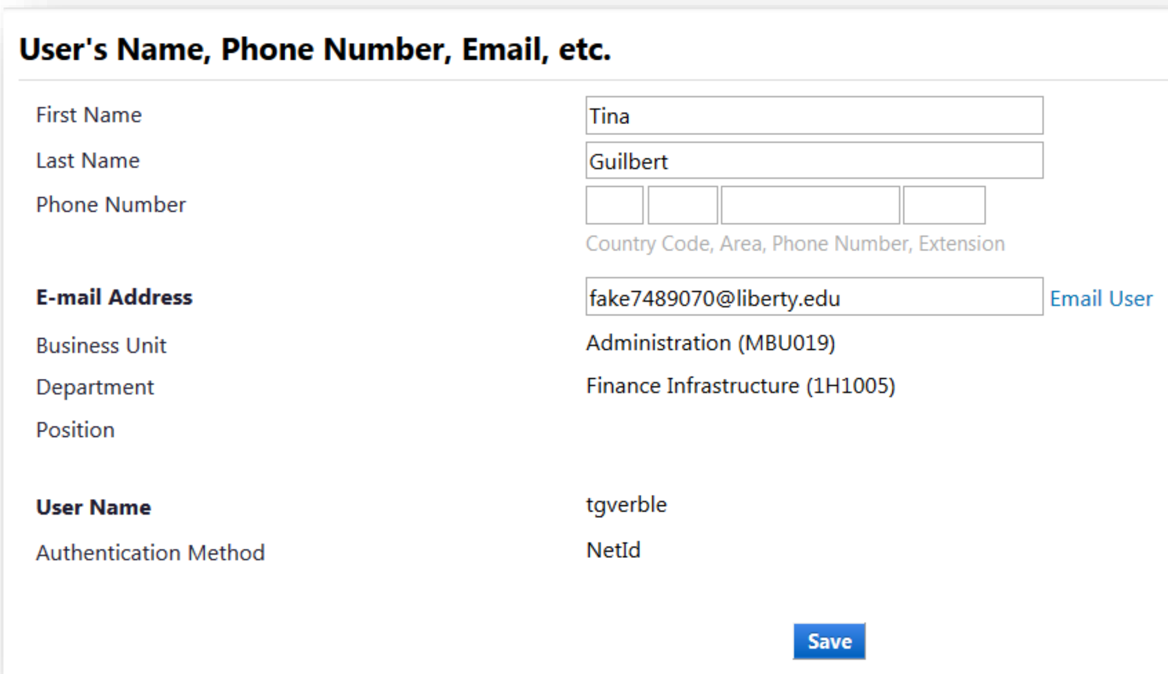


III. User Information and Settings

A. *User Profile Preferences*

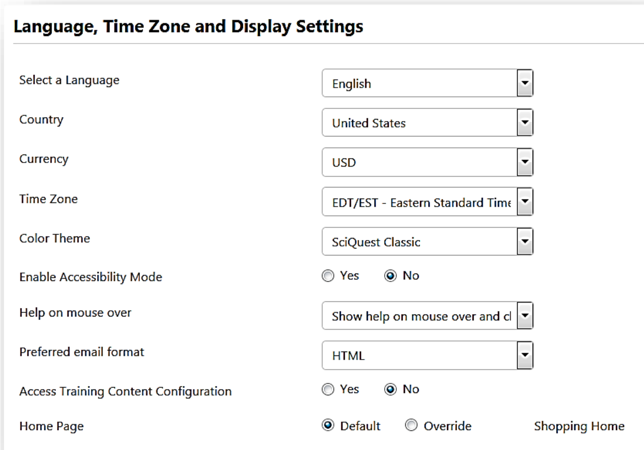
1. User's name, Phone Number, Email, Etc.

Review this section for accuracy.

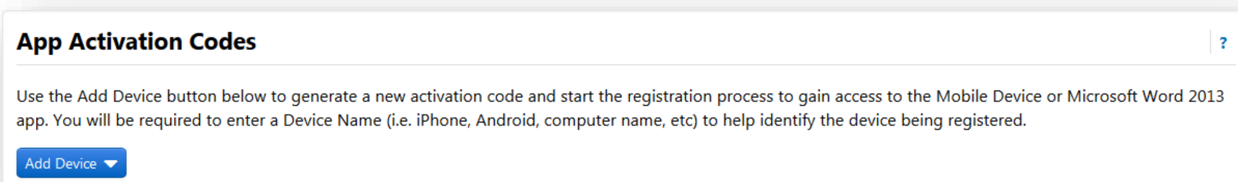


2. **Language, Time Zone and Display Settings**
Enter the applicable information in the fields given.

Note: under Color Theme the user has the option of changing the colors of his or her buyLU dashboard.



3. **App Activation Codes**
This option contains an "**Add Device**" button which allows you to set up access to a Mobile Device or Microsoft Word 2013 app.

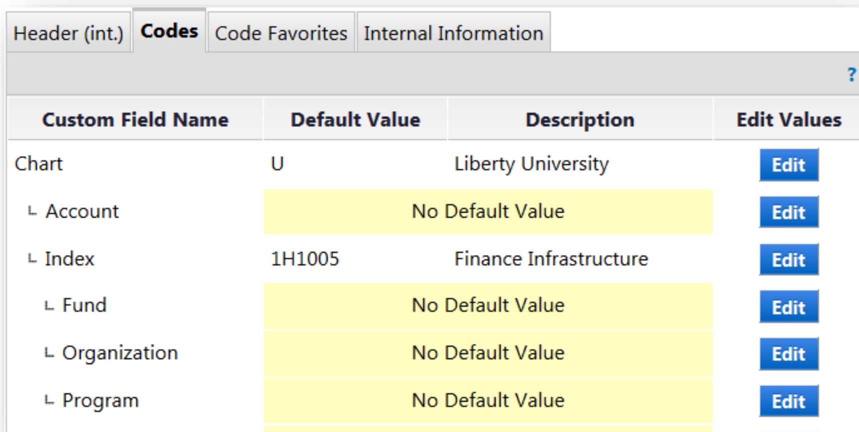


B. *Default User Settings*

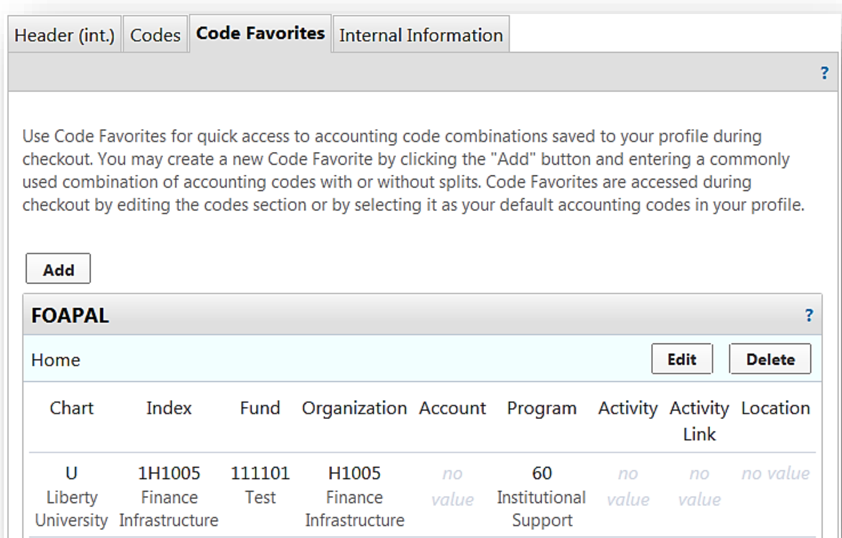
1. Custom Field and Accounting Code Defaults

Users have the ability to store values in various fields under these tab settings. In this section the two tabs areas that are the most useful to users are CODE and CODE Favorites.

a) Codes: This area is populated with the users "home" index code.

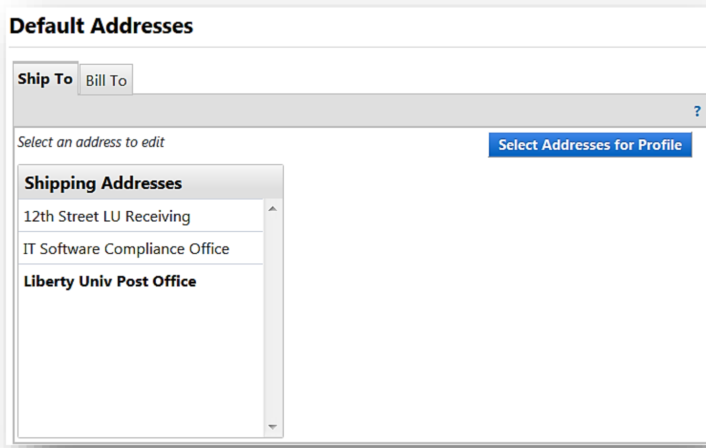


b) Code Favorites: Use Code Favorites to enter commonly used FOAPAL combinations which can be accessed during checkout. The user can create new Code Favorites by clicking the "**Add**" button.



2. **Default Addresses**

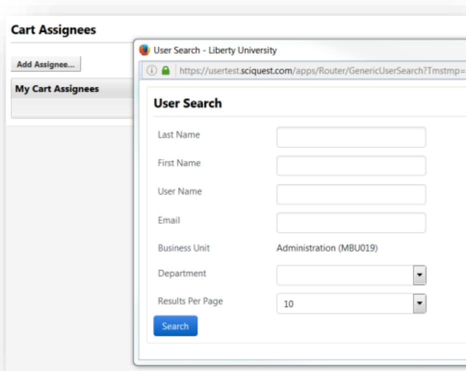
Default address information should be populated prior to using buyLU. The "Ship To" addresses in buyLU are the current addresses in Banner. The only acceptable "Ship To" addresses allowed in buyLU are official addresses previously determined by the university. The user is able to select more than one address.



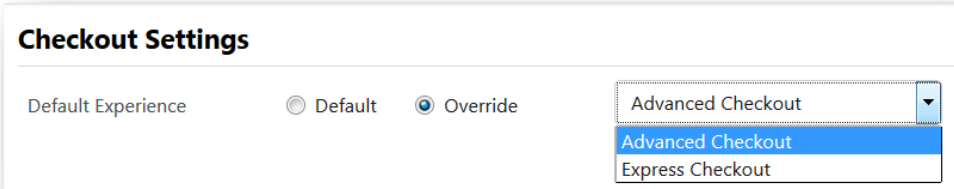
3. **Cart Assignees**

Depending on your role in buyLU you may need to designate a Cart Assignee. buyLU uses the assign cart function to allow Shoppers to submit orders to a Requestor or Approver for review, completion, and validation. For example, the original Shopper may select the items, but a Cart Assignee may be needed to enter the appropriate accounting codes.

Click the "**Add Assignee**" button to search for a user then select that user to add him or her as a cart assignee.



4. **Checkout settings**
This option allows the user to override his or her Checkout Settings. This option is only available for "Requestors" and "Approvers".



C. *User Roles and Access*

Roles are assigned to a particular user based on information received from departments and levels of responsibilities within individual departments.

1. **Shopper**
The shopper is the individual (user) who initiates the electronic purchase of goods and services by shopping and creating a "cart." The shopper uses the resources available to search for these commodities and services and in turn places his or her chosen items in a "shopping cart." After the desired items are placed in the cart the shopper assigns the cart to an Assignee or "Requestor."

Note: A Shopper may also have Requestor permissions.

2. **Requestor**
The Requestor receives the assigned cart. He or she reviews the cart for accuracy and proceeds to "checkout." After checkout the cart will go through an approval process.

3. **Approver**
An Approver is an individual designated to electronically review/edit and approve purchase requisitions within the delegated purchasing authority. The Approver electronically receives the purchasing request (PR) for approval. After verification, the Approver may approve the PR or reject part/all of the PR. Approval of the PR creates a Purchase Order (PO) that is electronically delivered to the vendor.

Note: Everyone will be able to view all of the shopping carts that require approval; however, only those in the Approver role will be

able to approve them.

4. **Receiver**
   Everyone who purchases will need to receive the items in buyLU. The Receiver verifies receipt of goods/services. All or part of the order may be received depending on delivery (backorders, damaged goods, etc.). The Receiver electronically "receives" the goods/services via buyLU.

To view your assigned role(s) click on "**Assigned Roles**" option.

D. *Ordering and Approval Settings*

The options under this heading cannot be edited; however, the user can view his or her order and approval settings which include the following:

- Purchasing and approval limits for requisitions, invoices
- Access to Punch Out suppliers
- What products he or she can view
- Assigned approval folders

E. *Permission Settings*

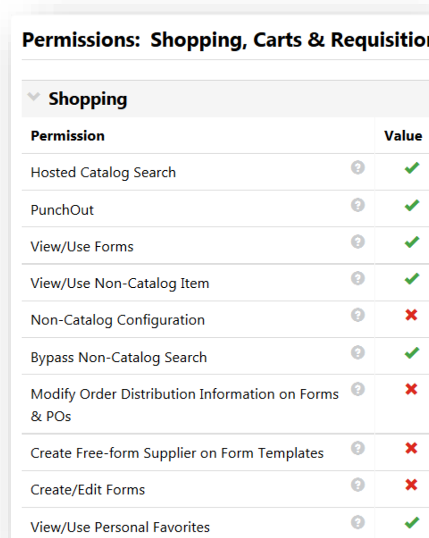
Each user is granted various permissions within buyLU. These permissions are based on the level of responsibility of the user.

NOTE: These screen shots are <u>for reference only</u>. User's permission settings will vary considerably depending on the individual's role and the administration's settings.

1. **Shopping, Carts & Requisitions**
   Displayed is an example of the information that may be viewed.

   If permission is granted, a check mark will appear in the value field.

   If permission is not granted an X will appear



Permissions: Shopping, Carts & Requisitior

Shopping

Permission	Value
Hosted Catalog Search	✓
PunchOut	✓
View/Use Forms	✓
View/Use Non-Catalog Item	✓
Non-Catalog Configuration	✗
Bypass Non-Catalog Search	✓
Modify Order Distribution Information on Forms & POs	✗
Create Free-form Supplier on Form Templates	✗
Create/Edit Forms	✗
View/Use Personal Favorites	✓

2. Orders

Permissions: Orders

My Orders/Organization Orders

Permission	Value
View My Orders	✔
View Organization Orders	✖
Edit Organization Orders	✖
View My Business Unit Orders	✖
View My Department Orders	✔
Revise PO	✖
Update Purchase Order Owner	✖

3. Approvals

Permissions: Approvals

Requisition Approvals

Permission	Value
Edit Pending Requisitions (My PR Approvals)	✖
Approve/Reject Requisitions	✔
Approve/Reject Requisitions via email	✖
Forward Requisitions	✖
Order Consolidation	✖
Put Requisitions On Hold	✖
Expedite Requisitions	✖
Assign Substitute Approver for Purchase Requisition Approvals	✖

4. Contracts

Permissions: Contracts

Contracts Permissions

Permission	Value
Contract Configuration	✖
Contract Administrator	✖
Contract Manager	✖
Administer Projects	✖
Manage Contract Obligations	✖

5. **Administration**

View various Administrator permissions including:

- System Administration
- Business Unit Administration
- User Administration
- Catalog Administration
- Supplier Administration
- Supplier Profile Administration

User Administration

Permission	Value
View My Profile	✓
Edit My Profile	✓
Change Password	✓
Edit Personal Information	✓
Change My Dept/Position	✗
View All User Profiles	✗

Typical users will have certain User Permissions.

NOTE: Users are not able to change their password. buyLU utilizes Liberty's single-sign-on which allows users to use their LU ID username and password only.

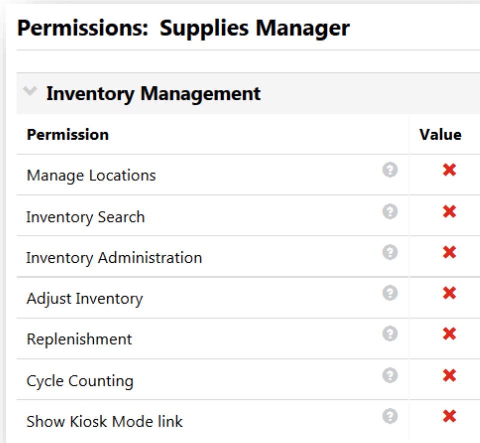
6. **Accounts Payable**

Permissions: Accounts Payable

Invoice Approvals

Permission	Value
Edit Pending Invoice (My Invoice Approvals)	✗
Edit Pending Invoice (My Invoice Approvals) - Account Codes Only	✗
Edit Pending Invoices (Any Approval Folder)	✗
Approve Invoices	✓
Reject Invoices	✗

7. Supplies Manager (Inventory)

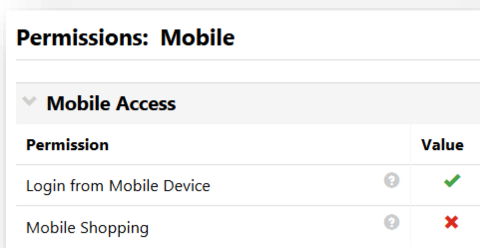


8. Custom Fields

This area allows users to view various custom field access and permissions. These are setup when the User's Profile is setup.

9. Mobile

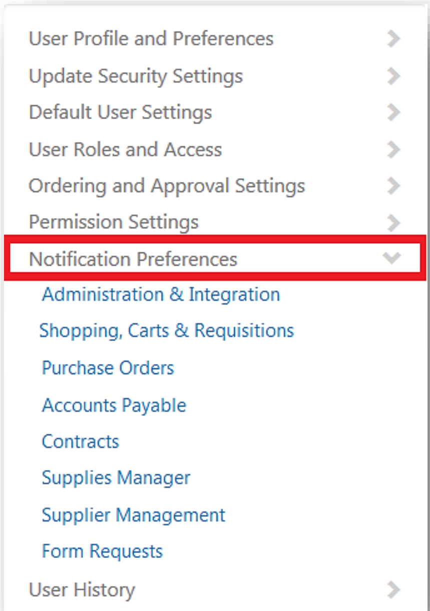
This area allows users to view his or her mobile access permissions.



F. *Notification Preferences*

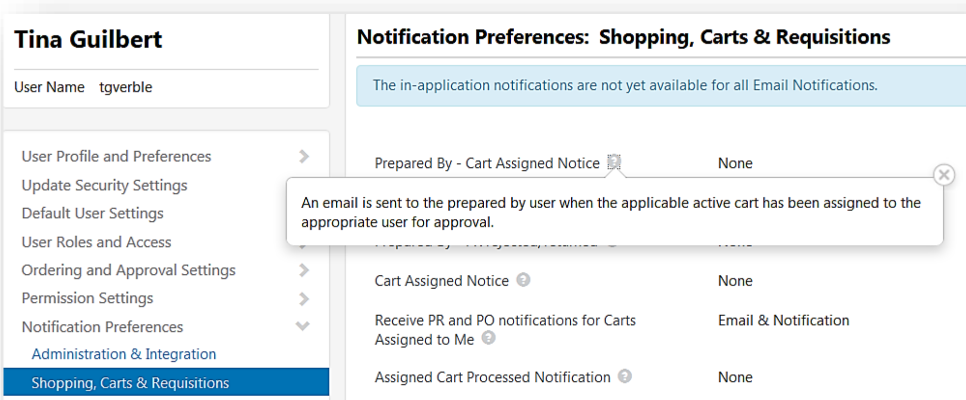
A standard set of default values is established for each user depending on their role in buyLU. Users can customize these settings to change the type of notifications and/or emails they receive for each function listed.

To change the notification settings choose from the **Notification Preferences** menu in your user profile:



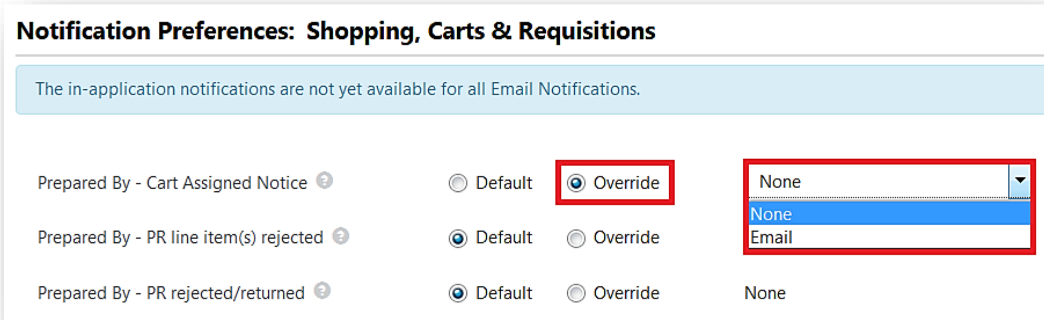
Choose one of the options by clicking on it. For example choosing **Shopping, Carts & Requisitions** will show the notifications settings for when a cart is assigned to the user.

Within the preferences screen users can click on the question marks to find out when an email will be sent to the user is this setting is changed to "email."



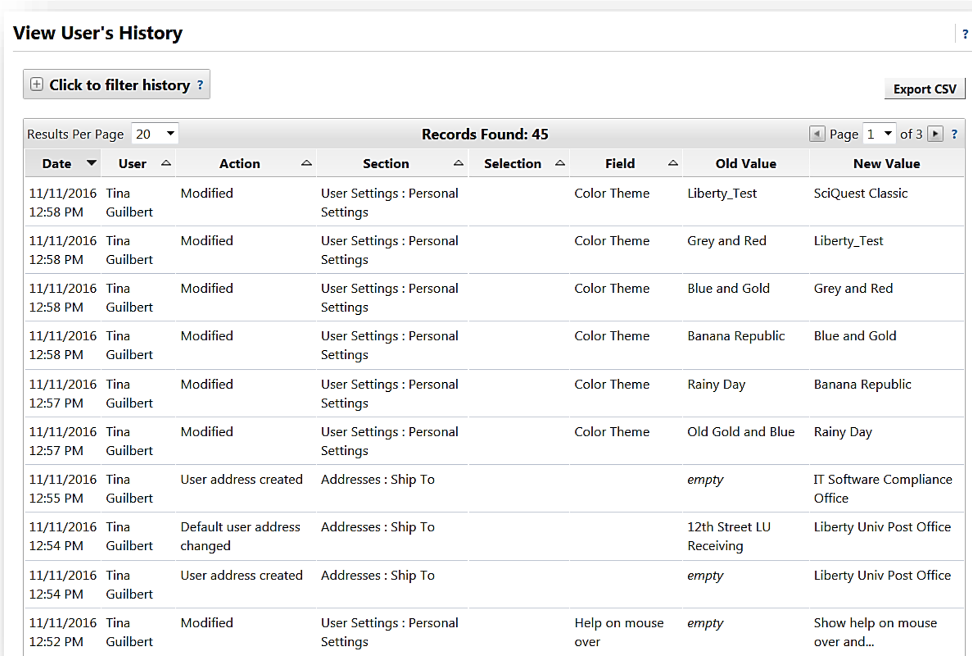
To change this setting click the "**Edit Section**" link that is located in the upper right of the screen.

Then click the **Override** radio button and choose an option from the dropdown menu next to **None**.



G. *User History*

When an action is taken with a user ID, information will be stored in the "History" tab. Typically, "History" will display the type of permission that has been granted or removed. Additionally, the date of the action and who performed the action will also be displayed.


View User's History

Click to filter history ?

Export CSV

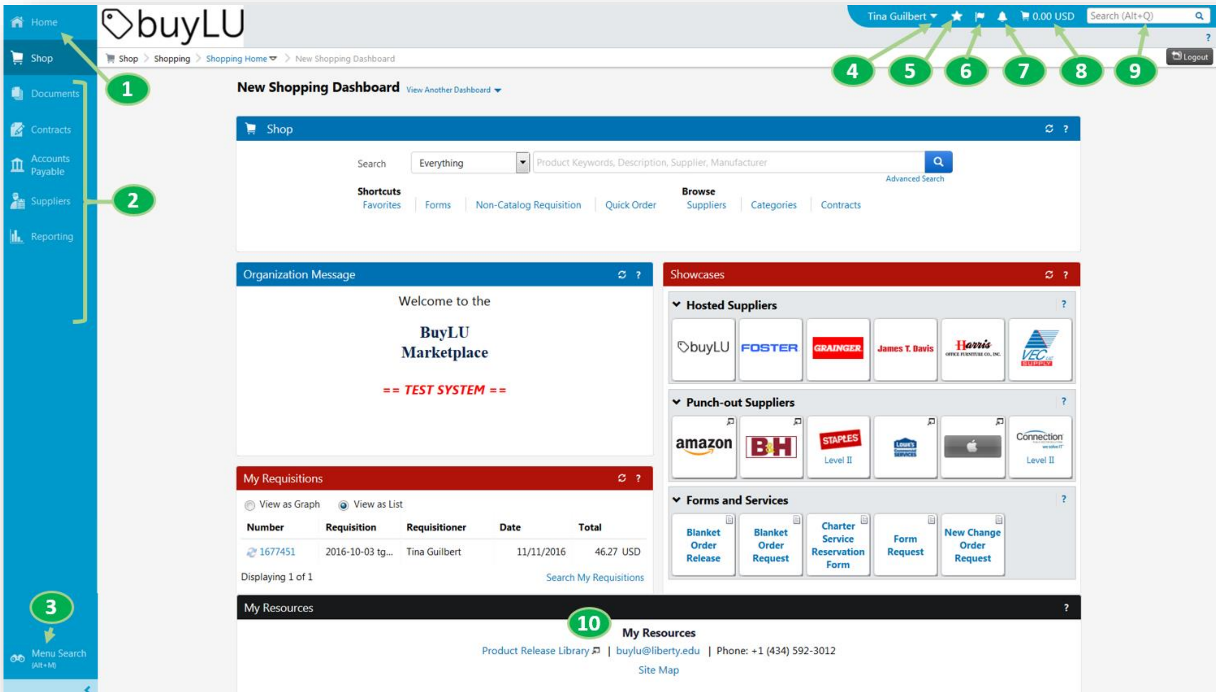
Results Per Page 20 | Records Found: 45 | Page 1 of 3

Date	User	Action	Section	Selection	Field	Old Value	New Value
11/11/2016 12:58 PM	Tina Guilbert	Modified	User Settings : Personal Settings		Color Theme	Liberty_Test	SciQuest Classic
11/11/2016 12:58 PM	Tina Guilbert	Modified	User Settings : Personal Settings		Color Theme	Grey and Red	Liberty_Test
11/11/2016 12:58 PM	Tina Guilbert	Modified	User Settings : Personal Settings		Color Theme	Blue and Gold	Grey and Red
11/11/2016 12:58 PM	Tina Guilbert	Modified	User Settings : Personal Settings		Color Theme	Banana Republic	Blue and Gold
11/11/2016 12:57 PM	Tina Guilbert	Modified	User Settings : Personal Settings		Color Theme	Rainy Day	Banana Republic
11/11/2016 12:57 PM	Tina Guilbert	Modified	User Settings : Personal Settings		Color Theme	Old Gold and Blue	Rainy Day
11/11/2016 12:55 PM	Tina Guilbert	User address created	Addresses : Ship To			*empty*	IT Software Compliance Office
11/11/2016 12:54 PM	Tina Guilbert	Default user address changed	Addresses : Ship To			12th Street LU Receiving	Liberty Univ Post Office
11/11/2016 12:54 PM	Tina Guilbert	User address created	Addresses : Ship To			*empty*	Liberty Univ Post Office
11/11/2016 12:52 PM	Tina Guilbert	Modified	User Settings : Personal Settings		Help on mouse over	*empty*	Show help on mouse over and... more...

IV. buyLU Navigation

A. The Home Page

The home page is the first screen that buyLU users will see.



1. **Homepage**

   The homepage is the page to which the site will default upon log in. Clicking on the homepage icon will return you to the Home/Shop Screen from anywhere in the application.

2. **Main Menu Options**

   On the left side of the screen are the main menu options. Each menu option contains sub-menu options. Clicking on a menu option will display available sub-menu options. To select a sub-menu item, simply click on the item and you will be taken to the appropriate area.

Option	Description
	Clicking on the Homepage icon will return the user to the homepage.

Option	Description
	The Shop menu contains the menu options related to shopping tasks including product quick search, access to the shopping page, forms and favorites and access to carts and orders.
	Menu items related to Document Search and Approvals are located in the Documents menu.
	The Contracts menu is primarily used to access features related to the Contract Lifecycle Management products.
	The Accounts Payable menu contains all tasks related to AP Director and AP Express, including invoice management and AP administration.
	The Suppliers menu contains all tasks related to the configuration and management of your organization's suppliers.
	Reports are accessed from the Reporting menu. The sub-menus are organized by report type and there is a separate sub-menu for downloading report extracts and exports.

3. Menu Search

Menu Search is a keyword search that returns a list of pages containing that keyword. Search results are clickable and take you directly to the page.

4. User Profile

Allows users to access their personal profile by selecting the drop-down menu and selecting View My Profile.

5. Bookmarks

The Bookmark feature allows you to save commonly used pages as bookmarks for quick access. You create and access bookmarks by selecting the icon.

6. **Action Items**

   Located on the left-hand side of the Home Page, provides a quick link to recent and completed Carts, Requisitions, and Purchase Orders.

7. **Notifications**

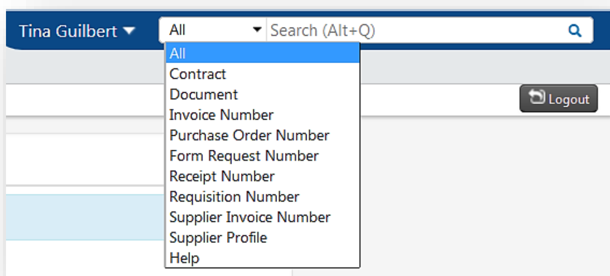
   Can be viewed from this drop down menu and are accessible from all areas of the buyLU application. Certain actions trigger notifications to specified users. Notifications are clickable and take you to the appropriate area of the application.

8. **Cart Preview**

   Allows the user to view active cart from anywhere in the application.

9. **Quick Search**

   This icon is available from all pages and utilizes a dropdown menu. Users can search on any of the available options.

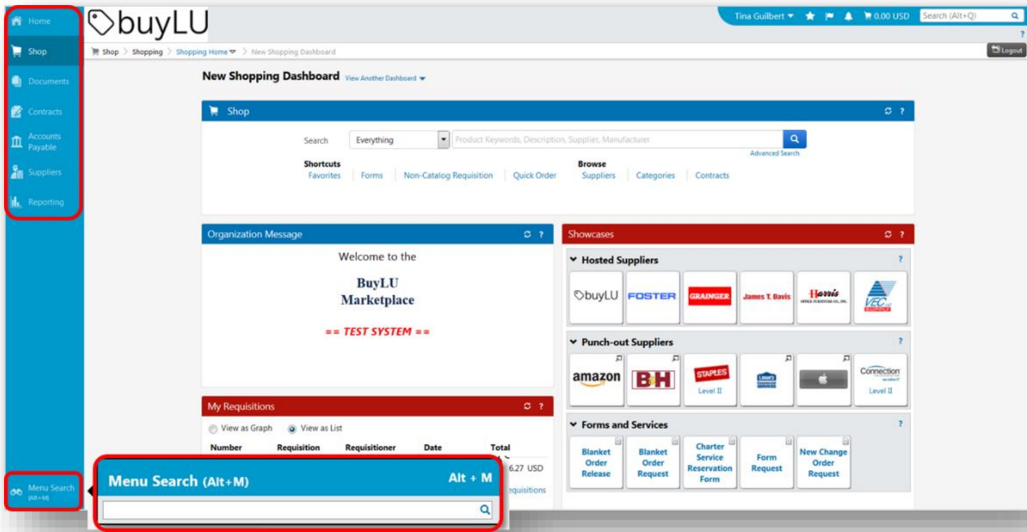


10. **My Resources**

    Located at the bottom of the main screen is resource information on how to contact the buyLU Help Desk.

B. *Slide Out Menus*

Navigation in buyLU is driven by slide out menus that display available menu options. The menu items stay hidden until they are accessed and are grouped by related tasks which make them easy to locate.



Note: Slide Out Menu options are determined by role. Some users will have more options that others.

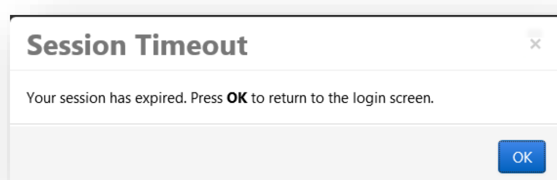
C. General Information

1. The Back Button

Do not use the BACK button associated with your browser. It may have a negative impact on the shopping cart.

2. Time-Out Sessions

buyLU will "time out" after one hour. If a user has not been active in the application during that time, the application will become inactive. If your session has expired you only need to click "**OK**" to return to the login screen.



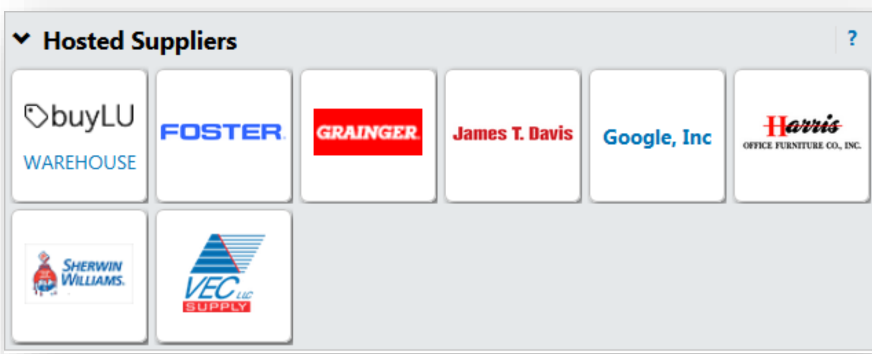
V. Suppliers in buyLU

There are three basic types of vendors/suppliers in buyLU: 1) Hosted Catalog Suppliers, 2) Punchout Suppliers, and 3) Non-Catalog Item Suppliers. The type of suppliers you select will dictate the manner in which you search for products and process your order.

Note: Items purchased from Hosted Suppliers will not route through Procurement unless they require Conditional Approval. Items purchased from Punch-out suppliers will always route to Procurement. It is therefore recommended that users have <u>separate</u> shopping carts for each type of suppliers.

A. Hosted Suppliers (Catalogs)

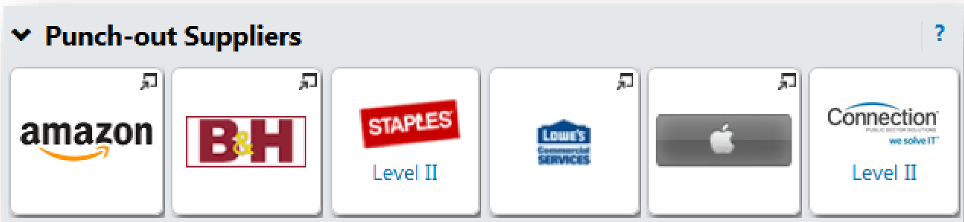
Hosted suppliers catalogs are online versions of the supplier's printed catalog. Hosted catalogs contain product data and details, along with LU negotiated prices and terms for each item. When a product search is performed, the products in ALL of the hosted catalogs are searched. Hosted catalog search results contain product information from all suppliers depending on the search criteria entered by the users. Hosted catalogs allow the user to perform side-by-side comparison shopping.



Note: The buyLU warehouse is the preferred supplier. Users are asked to check this supplier first for goods that they want to purchase.

B. *Punch-out Suppliers*

Punch-out catalogs are integrated external links to a supplier's web-based catalog. These are suppliers for products where LU has a contract or where products often require custom configuration. The user automatically exits buyLU to search and select products from a supplier's web catalog, and then is automatically returned to the buyLU shopping cart. The selected items are

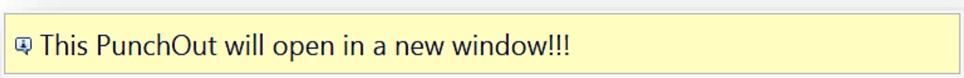


then submitted directly to Procurement for approval. Since a punch-out catalog only allows the user to be in that **one** catalog – no side-by-side comparison can be performed.

1. Amazon

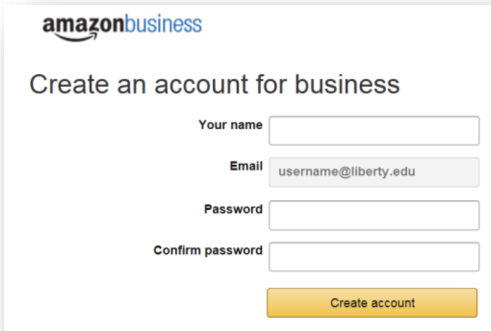
The first time shoppers "punch-out" to Amazon they will be required to set up an account. To set up the account click the Amazon tile.

A new window will open in your browser.

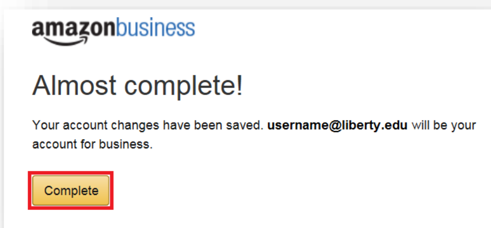


The Amazon Business welcome screen will appear. Click "**Continue**."

On the next screen enter your name, create a password, and click Create account.



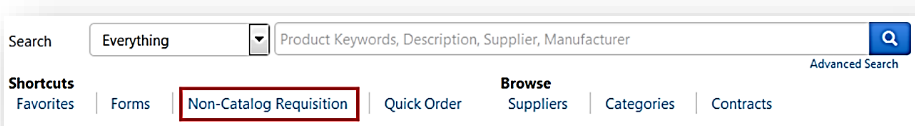
On the last screen click Complete.



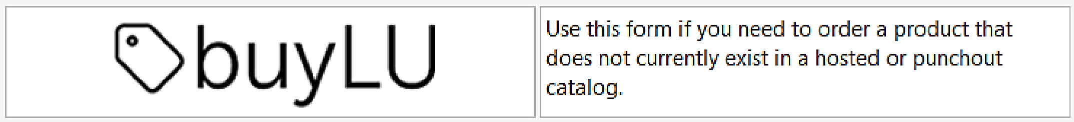
Note: If you shop Amazon during breaks or lunch make certain that you are not in the business account.

C. Non-Catalog Suppliers

The remaining suppliers in buyLU are known as Non-Catalog Suppliers. These suppliers do not have a catalog available but they are a vendor in the buyLU system. Orders are placed to these suppliers by using a non-catalog item form. This would be very similar to using a generic order form to place the order. The form is filled out and added to the cart and continues through the standard workflow requisition process. You can also use this form for suppliers that we do have a catalog for but a specific item is not in the hosted catalog. Or perhaps the item is in the catalog but now is being offered at a reduced price.

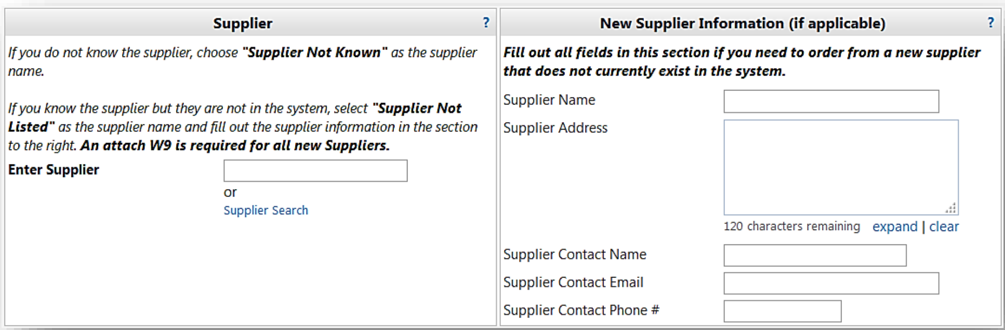


D. *The Non-Catalog Requisition Form*



1. The Supplier & New Supplier Sections

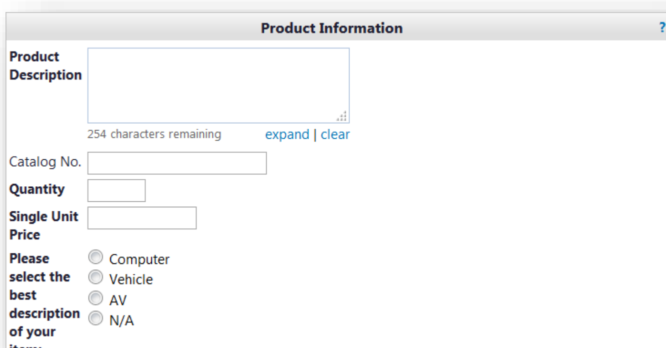
The **Supplier** section allows the user to either enter the search for the supplier using **Supplier Search** or enter the name of a new supplier. If a new supplier is added then the **New Supplier Information** section



must be filled in. A W9 form must be attached to this form for all new suppliers.

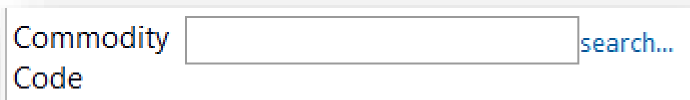
2. Product Information

In this section a description of the product is entered (this field wraps text please do not enter returns) along with the product catalog number, the quantity desired, and the price of a single unit. There are also radio buttons to be selected for best description of the item



3. **Commodity Codes**
There is a section for users to enter the Commodity Code. Users need to use the **search** field to search for the correct code.

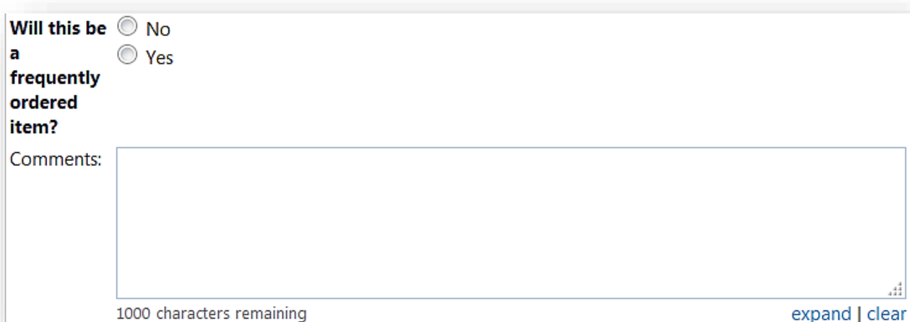
Note: Commodity Codes in buyLU are based on the item's manufacturer's Universal Product Code. These codes are not the same Commodity Codes which are used in Banner or Infor.



4. **Frequency of Item and Comments**
Users are asked to specify if this item will be ordered frequently. Items that are ordered frequently will be researched to determine if this supplier should be added to either the Hosted Suppliers or the Punch-out Suppliers.

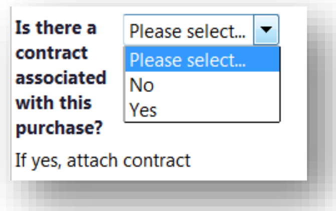
Users add comments to support the justification of the purchase.

Note: Comments added to forms or orders in buyLU are also visible to our vendors. Please keep this in mind and remember to keep comments professional and courteous.



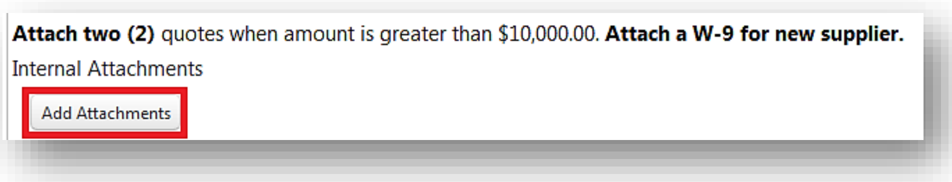
5. **Contracts**

If the purchase is already associated with a current contract then the user would choose "yes."



6. **Attachments**

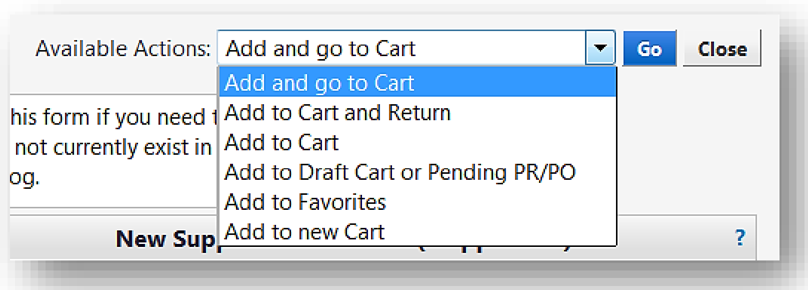
Users attach required documents directly to the form by using the **Add Attachments** button. The attached documents will travel with the requisition with the approval process.



Note: Users no longer send emails to Procurement with attachments. Required documents are attached directly to the order.

7. **Completing the Form**

Users complete the form by utilizing one of the Available Actions in the upper right corner of the form. Users choose one of the following:

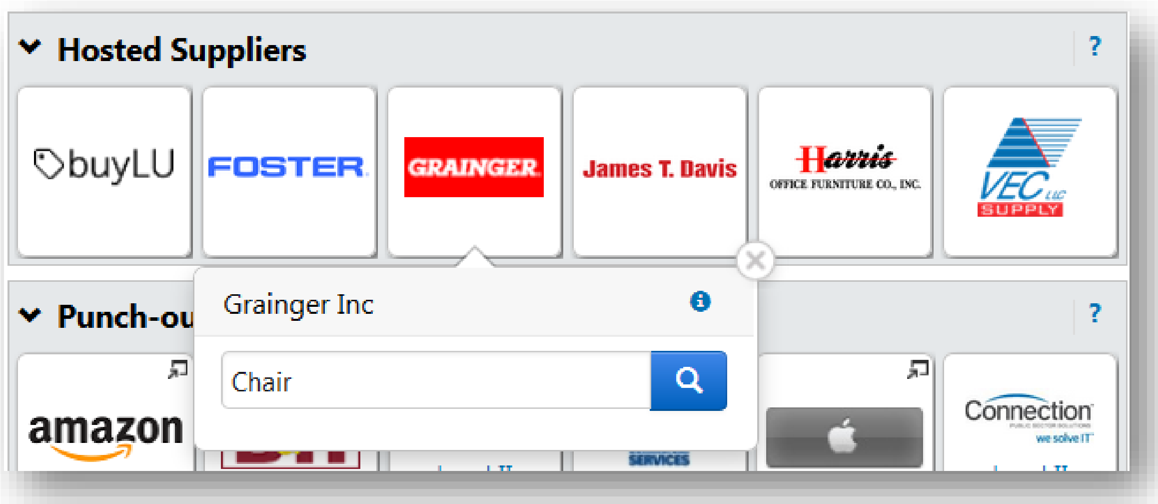


- Add and go to Cart: The item will be added to the cart. Use this option if only one item is ordered.

- Add to Cart and Return: The form will be added to the cart and the user will be returned to the form. This option is used if there is more than one item to be purchased from this vendor.
- Add to Cart: The item will be added to a cart that is currently in use.
- Add to Draft Cart or Pending PR/PO
- Add to Favorites: Use this if you will need to use the same vendor again.
- Add to a new Cart

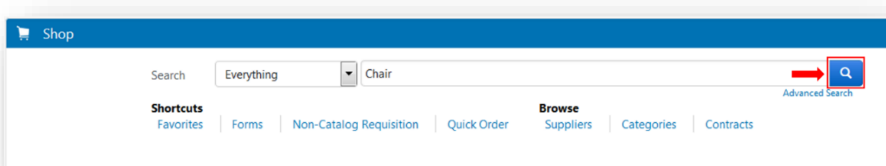
VI. Product Searches

Locating products in buyLU can be achieved in several ways. The user can either search in a Hosted Supplier catalog from the home screen, or click on a Punch-out Supplier to be taken to that supplier's website.

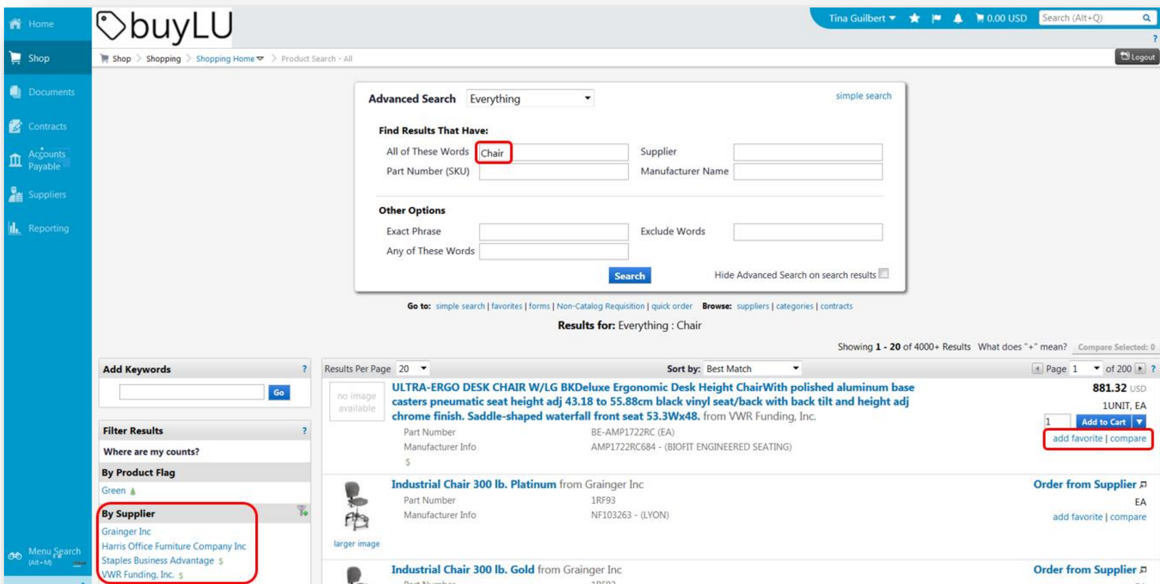


You can also search directly from the buyLU home screen. Enter the name of the item for which you are searching and press the "search" key.

NOTE: You can also search by part number.



The search returns results from each vendor that contains that product information; also the number of results. Preferred vendors would come to the top of this list. Notice the Refine and Filter Search box on the left. Here you can see a summary of your item By Supplier, By Category, By Packaging UOM (unit of measure). Use the **Add Keywords** feature to further refine your search. Each result in this section is an active link.



On the right side of the product list, the price displays along with packaging information. The quantity defaults to "1" and can be changed here before adding to the cart. If this is an item that is ordered frequently, you can click the "**add favorite**" link. If you have several items you want to compare between suppliers, click the "compare" link. The "**compare**" button will activate and a page will display for a side by side comparison of your product.

Once you determine the product you want to purchase, simply click the "**Add to Cart**" button. If the product you selected is from a punch-out supplier, instead of the "**Add to Cart**" button, you would click on the "**Order from Supplier**" link.

VII. Shopping Carts and Checkout

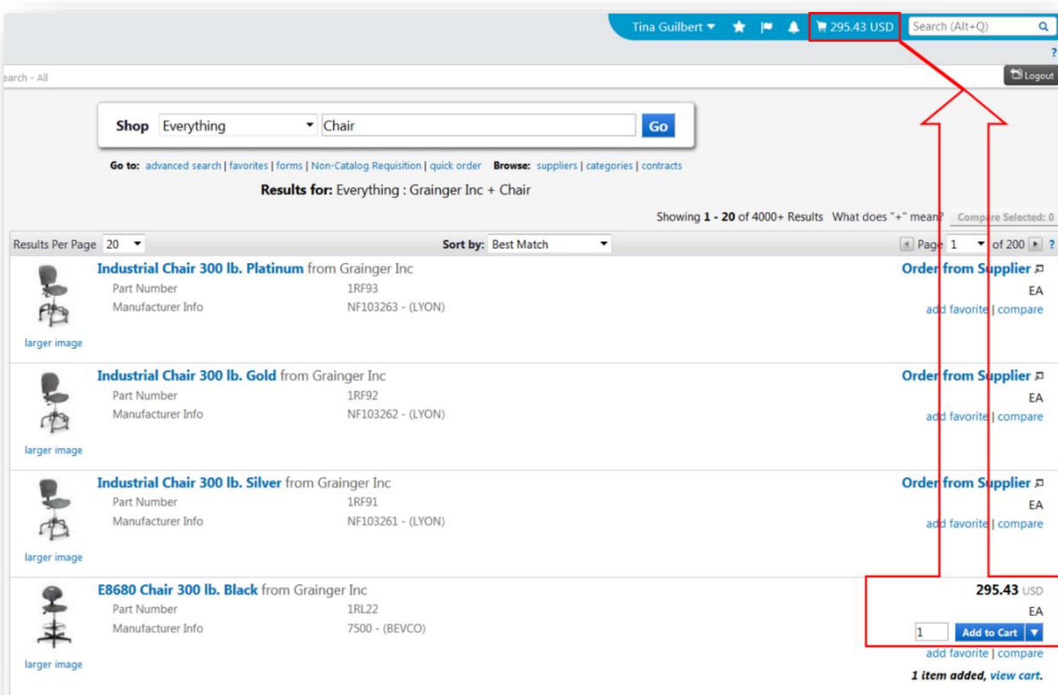
A. Shopping Cart Functions

1. Creating a new cart

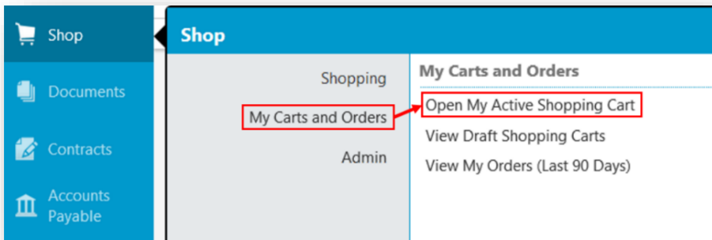
A cart is created when an item is added.

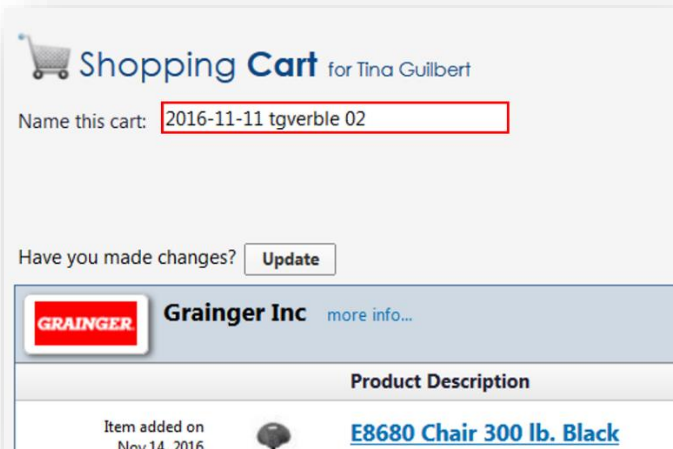
- Search for an item.
- Verify the quantity.
- Select option: "**Add to Cart**"

User has now created a Cart.



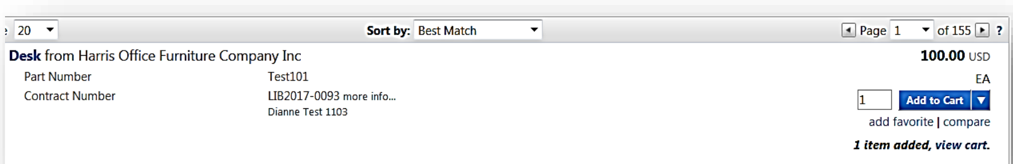
View your cart by clicking "**Shop**" on the slide out menu (on the left of the screen). Then click "**My Carts and Orders**", then "**Open My Active Shopping Cart**."





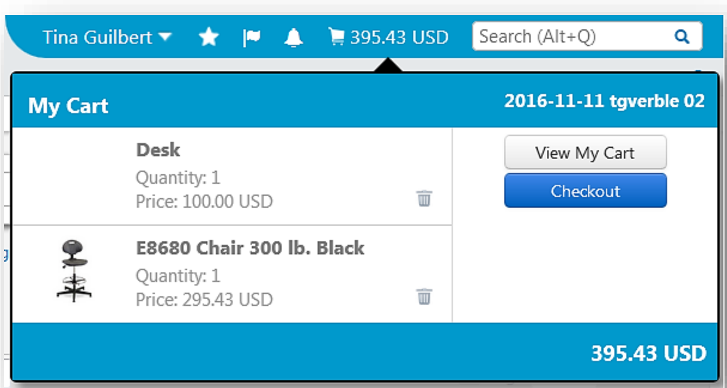
This will give you an opportunity to name your cart. **This is considered a best practice** as it will make it easier for you to search for a particular cart in the future.

2. **Adding items to the cart**
   Continue to search and add additional items to the cart.



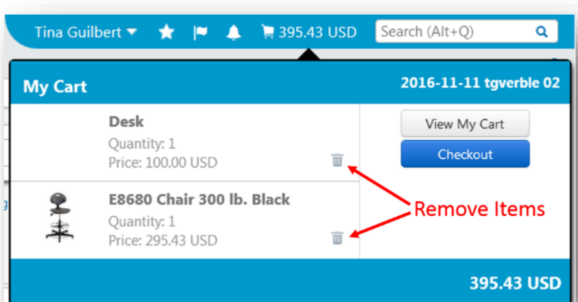
3. **Viewing the cart**

View the cart anytime by clicking the cart icon at the top of the screen.

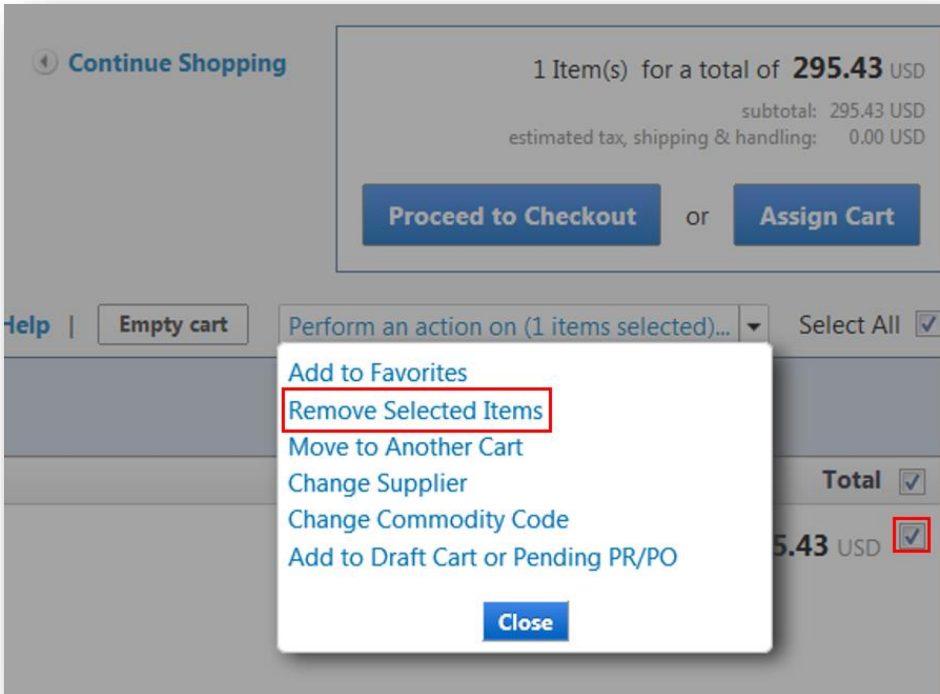


4. **Removing items in the cart**

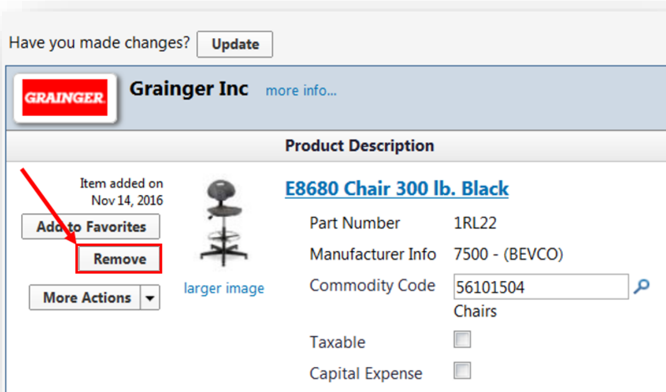
Remove items from your cart in several ways. You can remove an item by using the view cart option at the top of the screen and clicking the trashcan next to the item you want to delete.



You can access your cart from the slide out menu (Shop / My Carts and Orders / Open My Active Shopping Cart). Click the box to the right of the item you wish to remove. Activate the dropdown menu next to "**Perform an action**", and choose "**Remove Selected Items**."

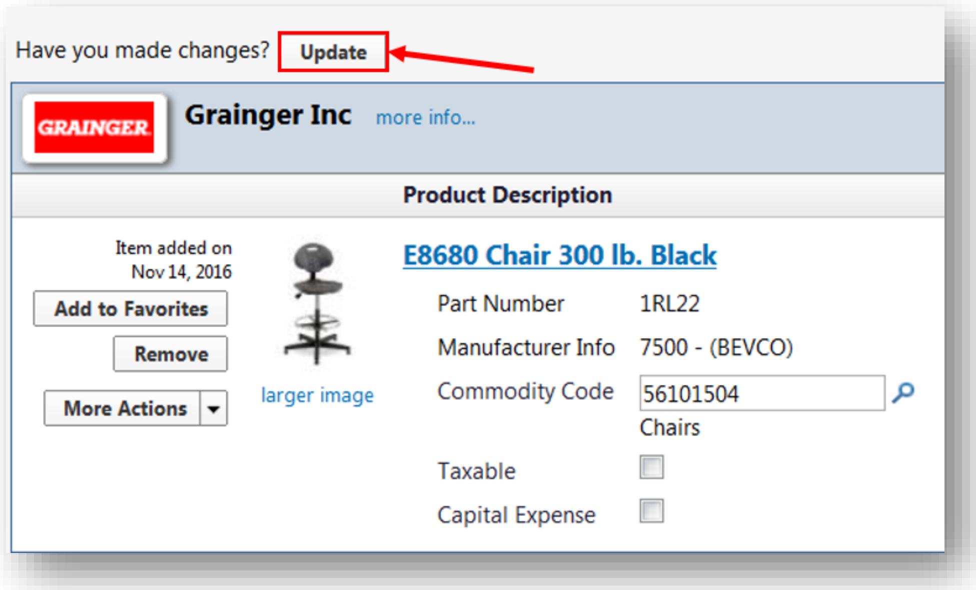


You can also remove an item by selecting the "**Remove**" button within the item in your cart.



5. **Updating items in the cart**

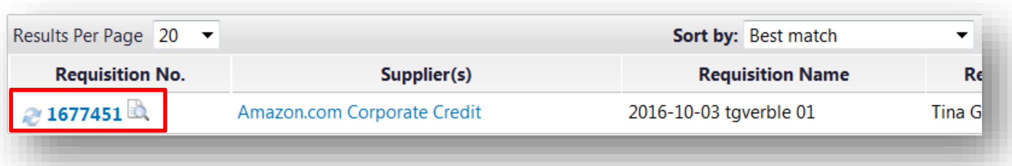
Access your cart via the "**Shop**" slide out menu, make changes and click "**Update**."



6. **Copying previous carts to a cart**

Open the "**Shop**" slide out menu. Go to "**My Carts and Orders**" then "**View My Orders (Last 90 Days)**."

Note: Users are unable to copy carts from Punch-Out Suppliers. Doing so will cause an error and the cart will not move forward.

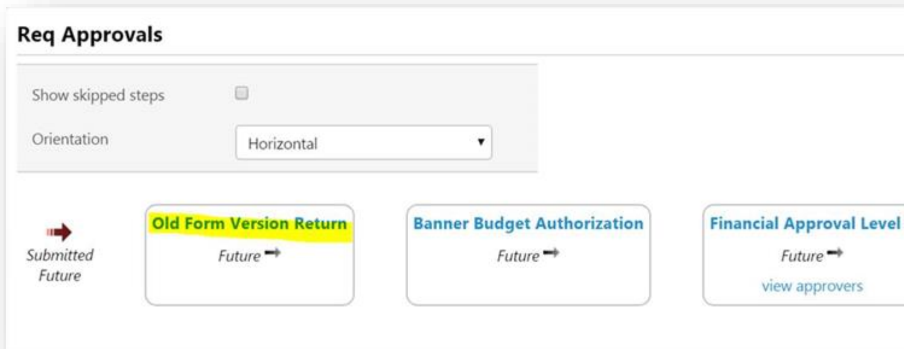


Click on the Requisition Number.

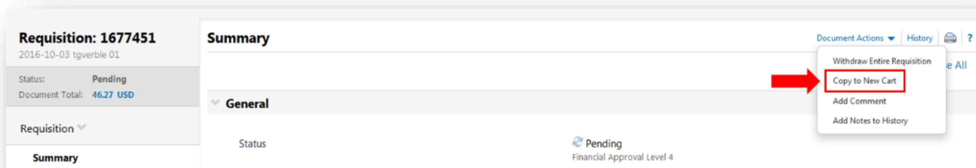
IMPORTANT: When shoppers/requestors use the copy function to create a new cart from a requisition generated with the **old form**, it causes issues with processing; therefore, if a submitted Requisition contains an old form, the system will reject it and send an email stating: **"The following notes were attached to this requisition during the workflow process: Your requisition has been rejected because there is an updated version of the form you copied to your cart. In**

the Forms tab please complete the current version and resubmit." To submit your order, you will need to create a new requisition selecting the Non-Catalog Requisition or Form from the Forms tab.

Before submitting the requisition check the Approvals tab. If an Old Form is being used it will show.



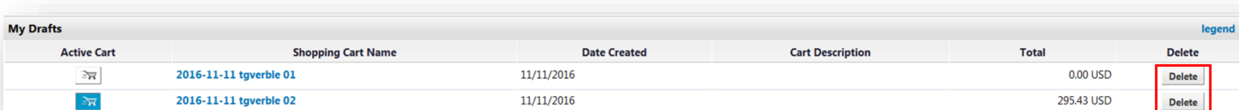
When the Requisition opens use the dropdown menu on the right side of the screen under "**Document Actions**" and choose "**Copy to New Cart**."



7. **Deleting a cart**

Access the "**Shop**" slide out menu. Choose "**My Carts and Orders**", then "**View Draft Shopping Carts**."

Delete a cart by clicking the "**Delete**" button.



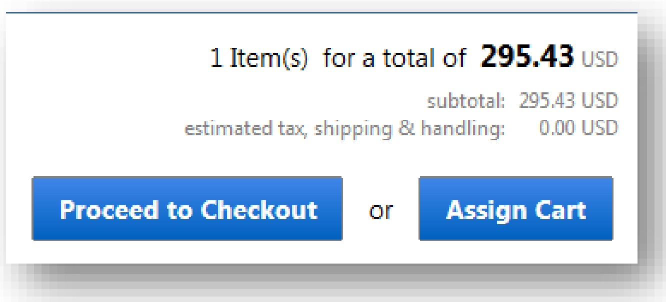
B. Checking Out

1. Assigning a cart

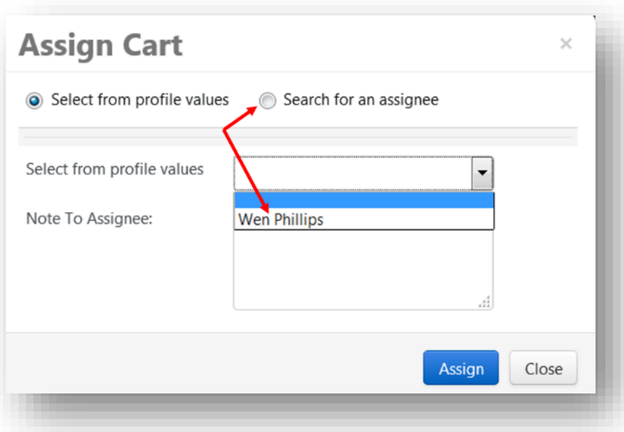
Each department has Requestors that their shoppers are required to send shopping carts to for approval. Shoppers should set the designated Requestors as profile values. This will allow them to select their Requestor from a drop down list rather than having to search each time and will eliminate the possibility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

After finalizing the cart click on "**Assign Cart**."

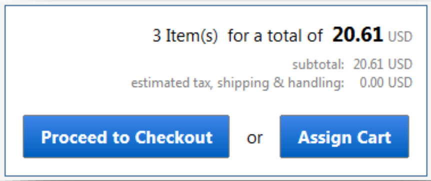
Note: Users may assign a cart containing items without account numbers (if they are unsure of which account to use); however, all items must have complete FOAPALs in order for a cart to be submitted.

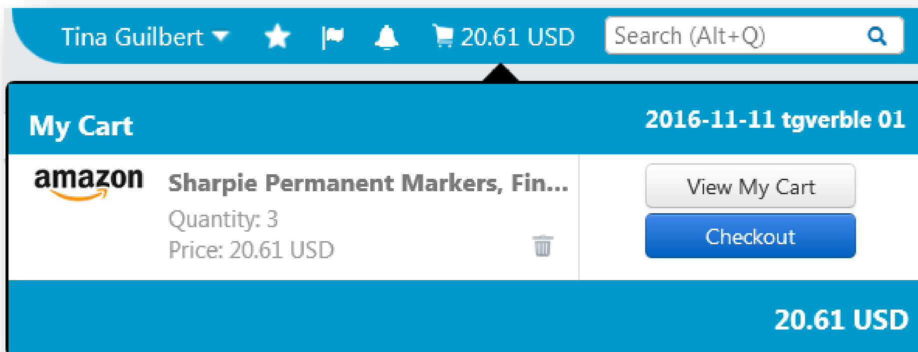


The box shown below will be displayed. Either choose an Assignee that you have previously designated in your profile or use the "**Search for and assignee**" feature.



2. **Proceed to Checkout**
If you are a "Requestor" then when the order is completed it is submitted by clicking the "**Proceed to Checkout**" button within the cart or the "**Checkout**" button from the cart dropdown.

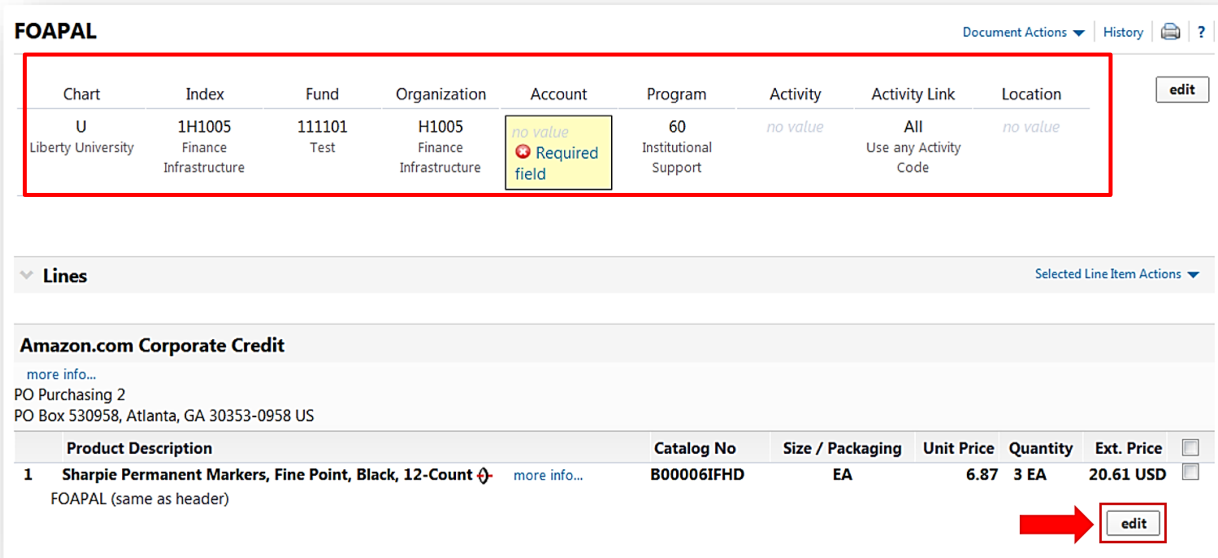




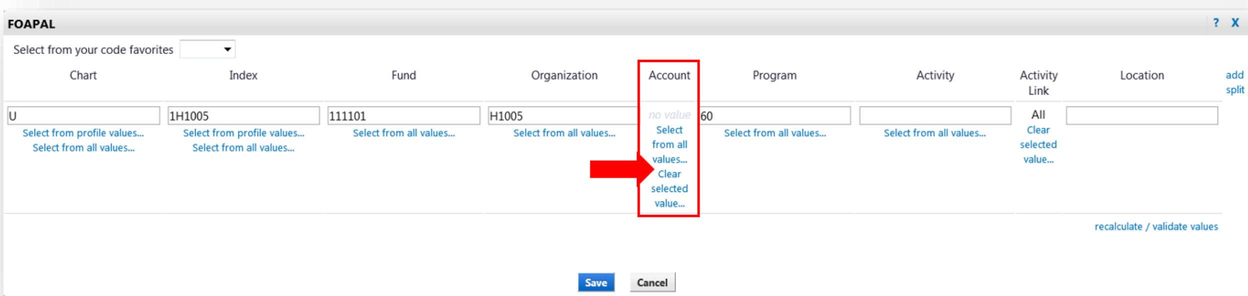
Review the "Header" for accuracy. The Header shows what department the cart is coming from. By editing each line item the Requestor has the option to choose the budget account for each item. This allows for one cart and multiple budget orders to take place thereby saving time.

Add the "Account" number by choosing the "**edit**" button to the right of **each item** in your cart.

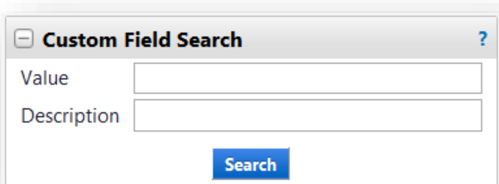
NOTE: Although the option to add the Account number is available under the FOAPAL section at the top of the screen it is important to add the Account via each item in the cart.



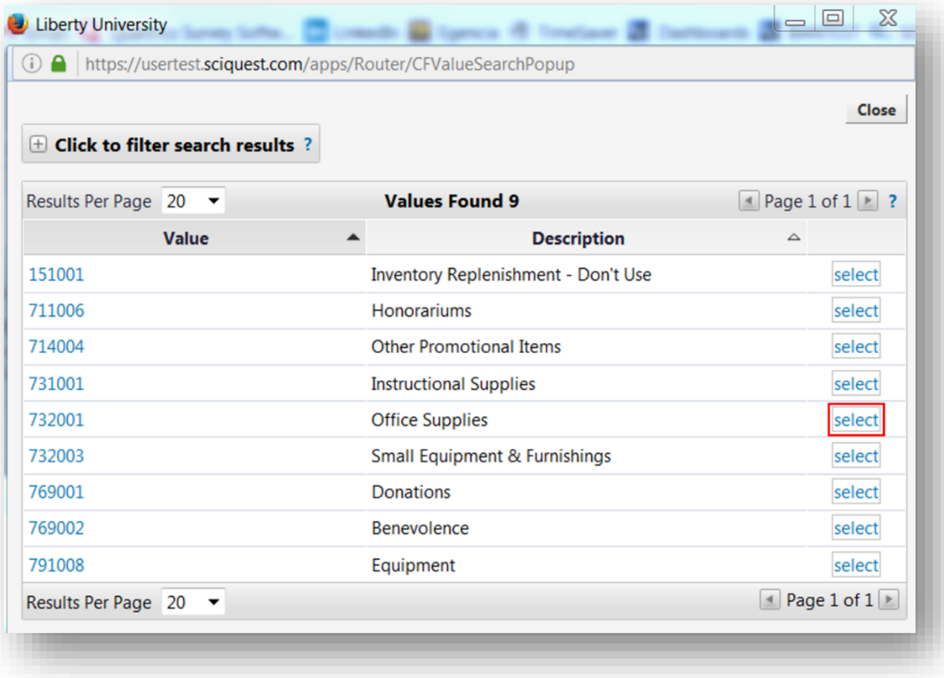
Click on "**Select from all values... Clear selected value...**" under the "**Account**" column.



The "Custom Field Search" window will appear. Click "**Search**."

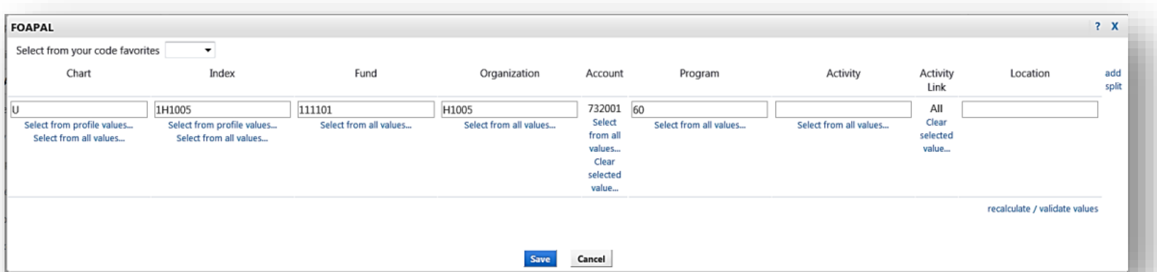


Select the correct account by clicking the "**select**" button to the right of the account number.



***Asset Purchases** - Assets which exceed the capitalization threshold should be charged to one of the 791xxx accounts. Those that are under the threshold should be charged to 732003 (Small Equipment & Furnishings). The threshold for all assets is $2500 with the exception of computers which have a capitalization threshold of $5000. (see attachment 1 – Assets)*

Once the "Account" number has populated, click "**Save**."

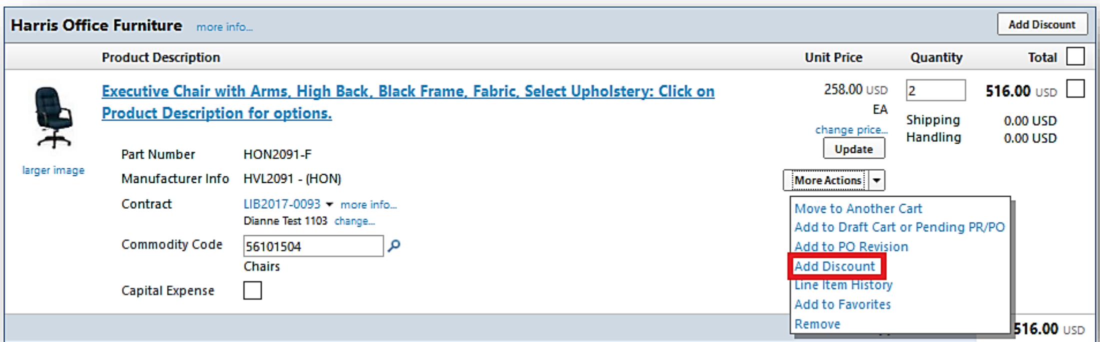


C. Discounts

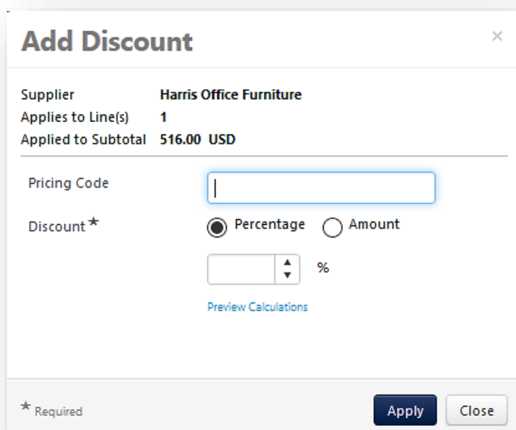
Discounts can be applied on both line level and the supplier level (applying a discount to all products from a specific supplier). A discount can be an amount or a percentage. Discounts are added in the cart before checking out. ***Important Note: This feature is used for applying MANUAL discounts.***

While there is an option to include a discount code, there is no validation of that code and discounts are not calculated by the application. The shopper is required to enter all of the details.

1. **Line-level Discount:**
   To add discount for a line in simple cart, locate the More Actions drop-down button. Click the button and select Add Discount.



A new window displays showing the supplier name, the discounted line(s) and the price subtotal for the discounted item(s). Fill in the following fields:



a) Pricing Code (optional) - If there's a code associated with the discount, enter it in this field. ***Important Note: This field is optional and is not used to calculate the discount, which is done manually in the following fields.***

b) Discount (required) - Click the appropriate radio button to determine if the discount will be based on a percentage or amount.

- Percentage - Select this option and enter a value in the field to apply a percentage discount.
- Amount - Select this option and enter a value in the field to apply an amount discount.

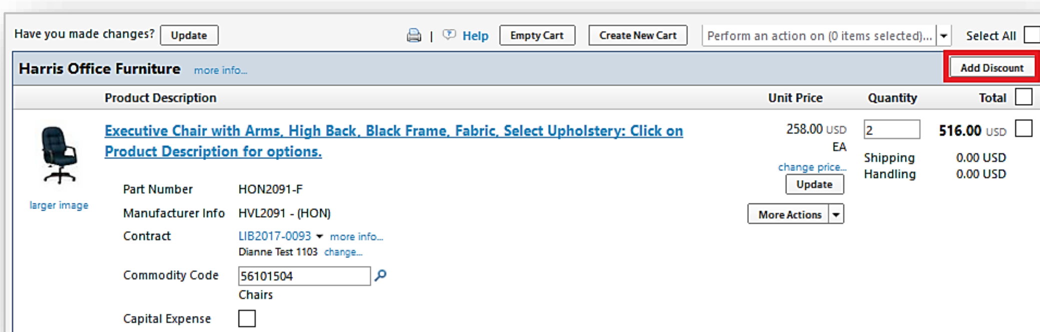
c) Preview Calculations - Select this link to see a preview of the discount before applying it.

d) Apply (required) – Click this button to apply the discount.

IMPORTANT! – Discounts cannot be applied to a zero dollar line. When applying the discount delete it from any line with a zero dollar amount.

2. Supplier-level Discount:

To add a supplier-level discount locate the supplier group and click the "Add Discount" button in the supplier group header.



a) A new window displays showing the supplier name, the discounted line(s) and the price subtotal for the discounted item(s). Pricing Code (optional) - If there's a code associated with the discount, enter it in this field. ***Important Note: This field is optional and is not used to calculate the discount, which is done manually in the following fields.***

b) Discount (required) - Click the appropriate radio button to determine if the discount will be based on a percentage or amount.

- Percentage - For supplier-level discounts, the percentage applies to each item. For example, if you apply a 50% discount, each item will be discounted 50%.
- Amount - For supplier-level discounts, the amount is divided among all items and is weighted based on the cost of the item. The discounts for each item add up to the total discount amount. You are able to adjust the amount of the discount per line. To do so, click the More Actions button and select Edit Discount. Important Note: The discounts per line item must add up to the total discount amount for the supplier. You will get an error if you attempt to submit a cart or document with mismatched amounts.

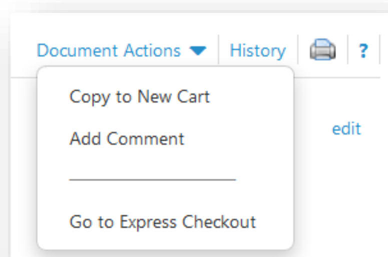
c) Preview Calculations - Select this link to see a preview of the discount before applying it.

d) Apply (required) – Click this button to apply the discount.

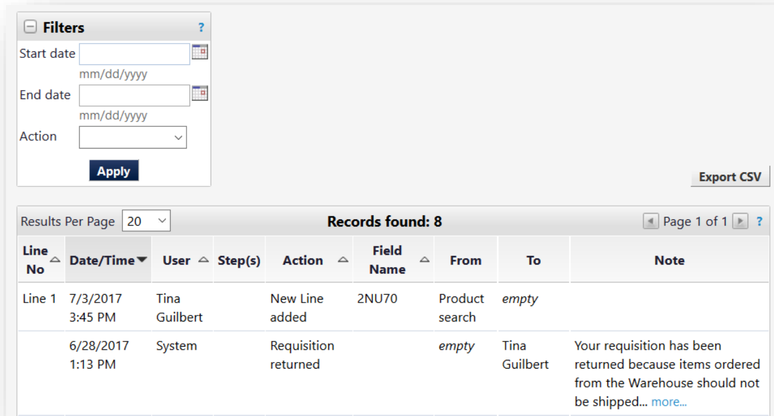
D. Requisition Final Review

Once the FOAPAL is added to the item(s) in the cart the requisition is ready to be submitted; however, best practice is to review each of the options on the summary page.

1. **Links:** There are links in blue at the top right of the requisition review screen.
   - **Document Actions:** This link contains a dropdown menu that allows the user to copy all of the items to a new cart or to add a comment to the requisition.



   - **History:** This link will open a new window which reveals all of the changes that have been made to the document. The data can be filtered or exported to a CSV file.

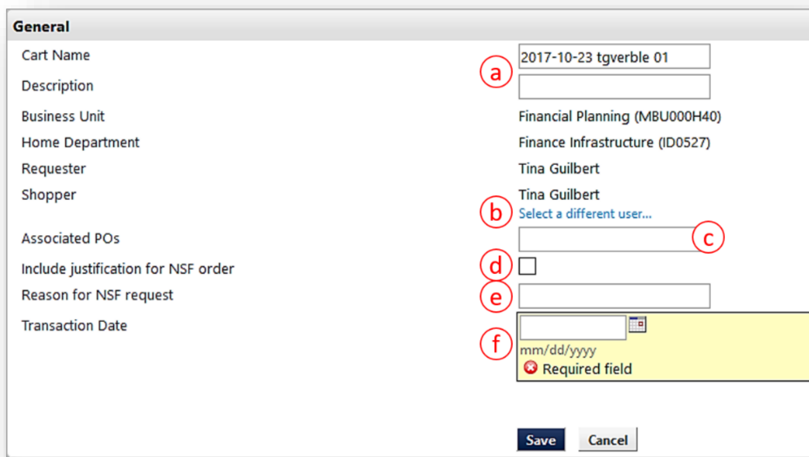


- **Print:** Will allow the user to print whichever page in the requisition is desired.

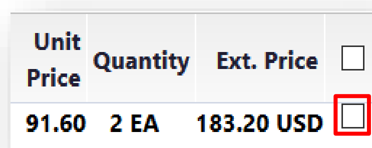
2. **General:**

- **Edit:** Clicking the Edit link will open a new window. This window will allow the user to:

  a) Edit the Cart name and add a Description
  b) Select a different "Shopper"
  c) Enter any associated PO numbers
  d) Request an NSF override
  e) Enter the reason for the NSF request
  f) Enter the Transaction Date (The date that the check is needed). ***This field is required.***



- **Lines:** In the center of the page the user can view all of the lines in the requisition. The link on the right side of the page, Selected Line Item Actions, contains a dropdown menu. Users have the option to select a line item by checking the box to the right of the item and choosing an option from this menu. Options include:



  a) Add to Favorites
  b) Remove Selected Items
  c) Remove All Items
  d) Move to Another Cart
  e) Add to Draft Cart or Pending PR/PO

f) Line Item History

g) Change Commodity Code

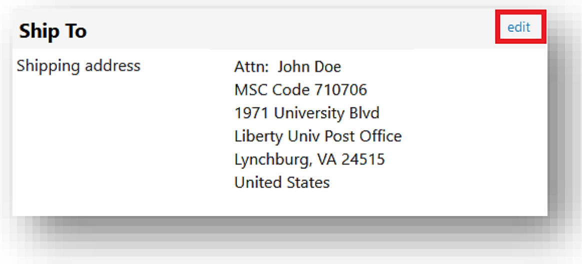
h) Requires Sourcing

i) Remove Requires Sourcing

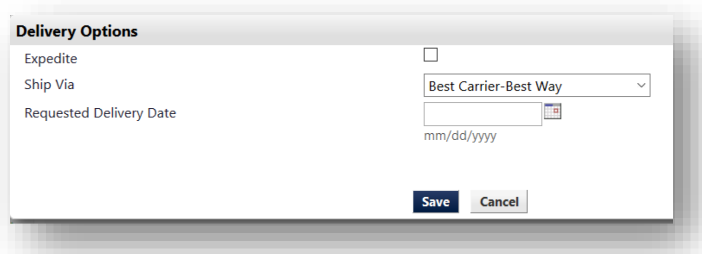
3. **Shipping**

There are several options the user has when reviewing the Shipping summary.

- **Ship To:** Users can edit the shipping address. Note: Be certain that things from the warehouse are not shipping to 12th Street (which is the warehouse).

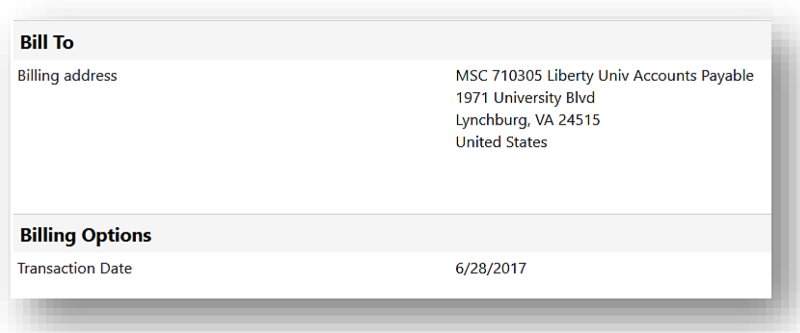


- **Delivery Options:** Here users can choose to Expedite the order, choose how they wish to have the order shipped, and request a delivery date.



4. **Billing**

The billing section has the **Bill To** address and **Billing Options**.



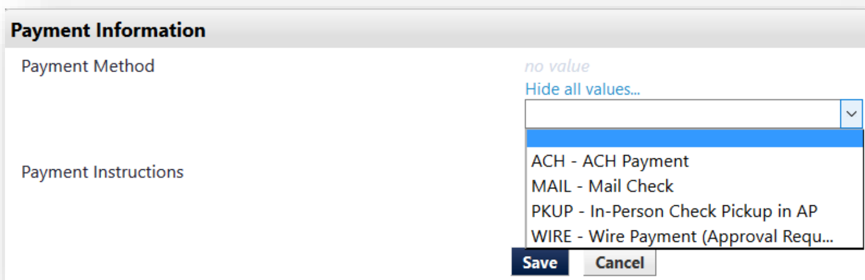
- **Bill To**: This address is defaulted to Accounts Payable and should not be edited.

5. **FOAPAL**
This section gives the user the opportunity to review the FOAPAL for accuracy and edit it if needed.

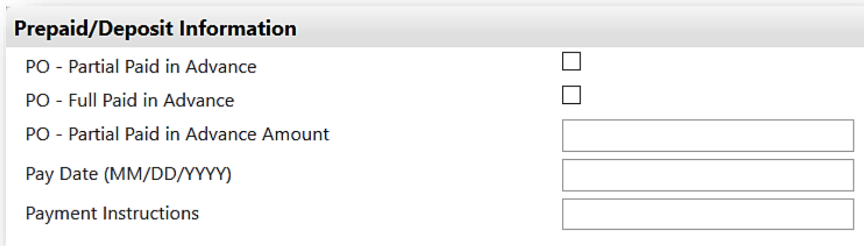
6. **Internal Information**
Clicking the **edit** link at the top right of this section allows the user to add a note to the request. This note is not visible to external entities (e.g. suppliers).

   Clicking the **Add Attachments** button allows the user to upload files from his or her computer, or add web page links (URLs) to the request.

7. **Payment Information**
Clicking the **edit** link at the top right of this section allows the user to add **Payment Methods** and **Payment Instructions** to the request.

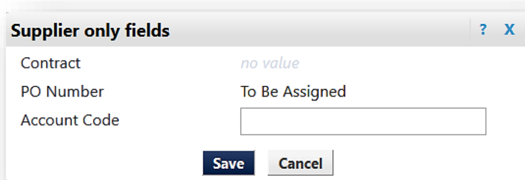


8. **Prepaid/Deposit Information**
If there has been advanced payments for this requisition the information relating to that payment should be entered here.



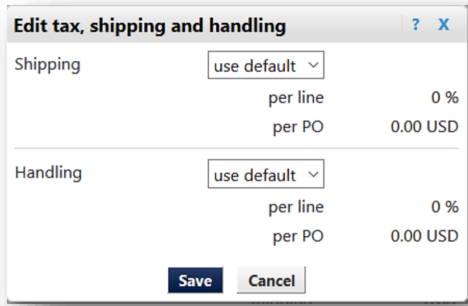
9. **External Notes and Attachments**
This section contains external notes and attachments that are visible outside of the application (e.g. suppliers). Enter additional information that is pertinent to supplier to assist in the processing of your order.

10. **Supplier Information**
Clicking the **edit** link at the top right of this section allows the user to enter any special account codes that need to be sent with the order.



11. **Taxes, Shipping & Handling**

Clicking the **Edit taxes, shipping and handling for all line items in this group…** link will open up a window which allows the user to override the default shipping and handling charges.



12. **Final Review**

This is a summary of all of the previous sections, and is an opportunity for the user to look at the entire requisition once more.

13. **Req Approvals**

For Requisitions that are subject to approval, the approval chain can be previewed by going to the PR Approvals page. The functions on this page include:

- Review graphical representation of approval chain for this requisition.
- View approvers assigned to workflow steps so that the user can send notes or call approver(s) in advance of requisition

14. **Comments**

Utilize the Comments page to add details about a Requisition or to request information about a Requisition. Users can select who should be notified about the comment addition through an email notification. Internal attachments and URLs can also be added to requisitions through the comment functionality. The number of comments on a document is shown in ( ) on the Requisition tab.

In addition, comments that are added during the various actions listed below will also display on the comments tab:

- Approve (when approving on behalf of another approver)
- Reject entire PR (within workflow)

- Reject Line Item(s)
- Draft Cart Assignment
- Assign
- Unassign
- Forward
- Place on Hold
- Add note to history
- Expedite through workflow steps
- Unconsolidate a line item
- Bypass a workflow step
- Withdraw entire PR
- Withdraw line(s) on PR
- Return PR

15. **Attachment Overview**
The Attachment Overview page shows a list of all of the attachments for this Requisition as well as a count of the total attachments on the page itself.

16. **PO Preview**
Once the PO has been assigned the user can view it in this section.

E. Submit the Requisition

To submit a requisition click "**Submit Requisition**" at the top right of the screen.

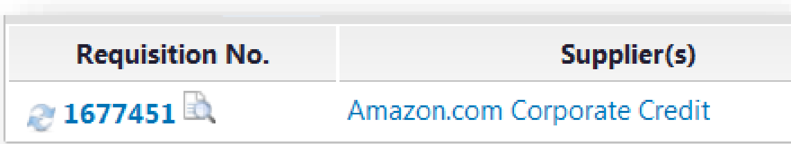
1. **Reviewing the cart workflow**

   The workflow process begins when a cart is submitted. Think of workflow is the path your cart will follow, depending on what is in the cart, if a form is being used, the funds and accounts being used, and the amount of money being spent. Workflow guides your cart to the appropriate approvers and ultimately releases it to the supplier. The goal of workflow is to make sure that all orders comply with State, Federal, and LU policies, as well as give budget authorities oversight into the funds they manage.

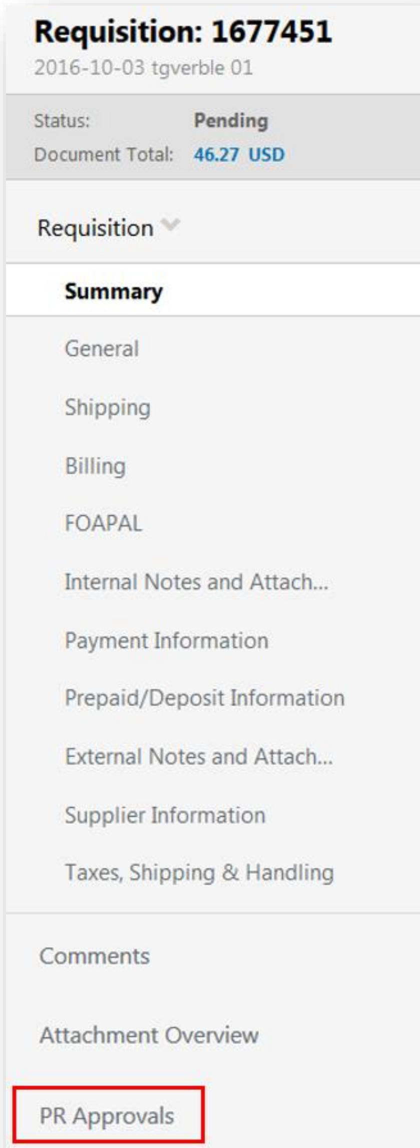
   Workflow steps are either manual or automatic. An example of a manual workflow step is when a requisition stops for fund approval. A person, the fund approver, would have to approve or reject the requisition. An example of an automatic workflow step would be when the budget is checked against Banner or where the requisition is routed and a notification is sent.

   You can review the workflow of a submitted requisition by accessing the **Shop** slide out menu. Then "**My Carts and Orders**" and "**View My Orders (Last 90 Days)**".

   Find the Requisition that you wish to view and click on the Requisition Number.



On the left of the screen click on "**PR Approvals**."



You can see from the example below, the first stop for this requisition is for the **Banner Budget Authority**. The Banner Budget Authority is automatic. If a requisition does not pass the Banner check, it is returned to the Requestor and would be notified by a system generated email. The next step is the Fund Approval. Click on the "**view approvers**" link to see who will get notice of this requisition.

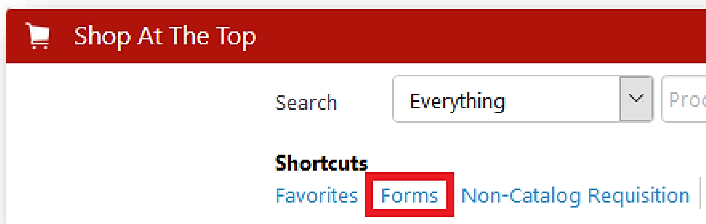
VIII. Change Orders

Once a Purchase Order is created, it becomes a binding contract with the vendor and it should not be changed. If the vendor requires the quantity or price to be changed, a new requisition should be created unless a prepayment has already been applied. The Change Order form is used to increase/decrease quantity and unit price as well as add commodity lines.

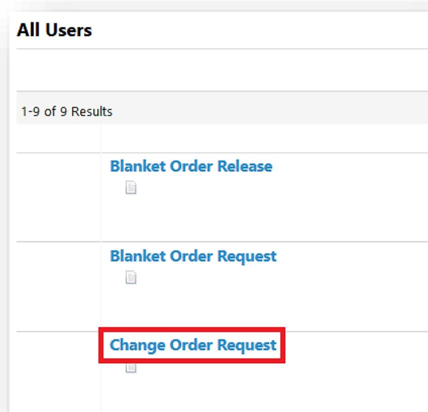
To complete a change order in buyLU, a Change Order Request needs to be completed. Change Order Requests should only be submitted for non-catalog orders.

A. Creating a Change Order

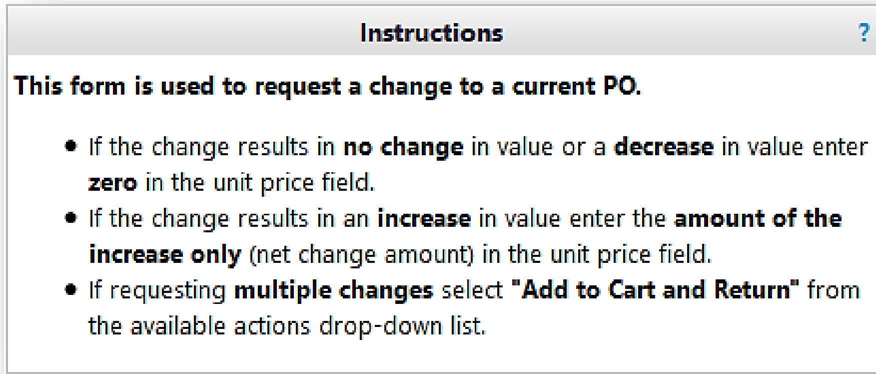
a) Select the "**Forms**" option on the buyLU "Home" screen.



b) Select "Change Order Request"

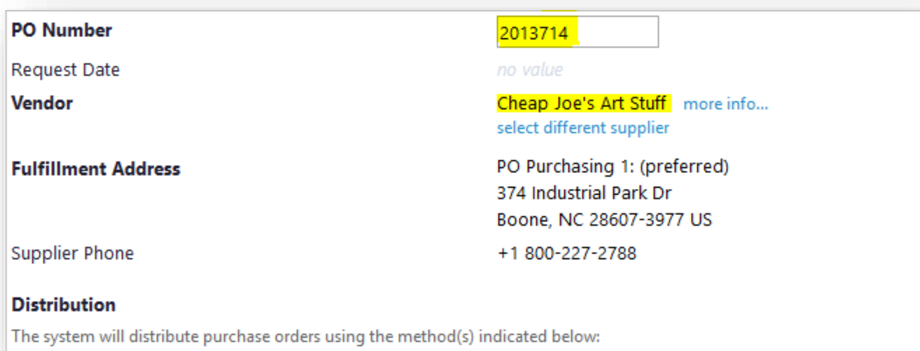


c) End users complete a form for ***each*** change to the purchase order. Instructions are included on the top of the form (see below).

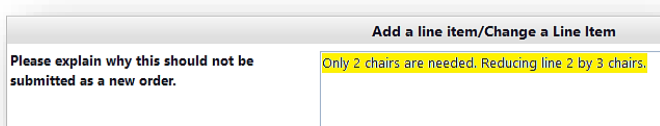


d) Enter the PO number of the purchase order you wish to change.

e) Enter the Vendor (when the vendor is selected press enter and the Fulfillment Address will populate).



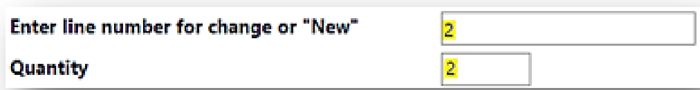
f) In the next section enter the details of the changes that need to be made. The first section should be used to explain what adjustments need to be made including the total of the increase or decrease.



g) Next enter the Product Description

h) Enter the line number on the original PO that you wish to change. If you are adding a new line enter "New".

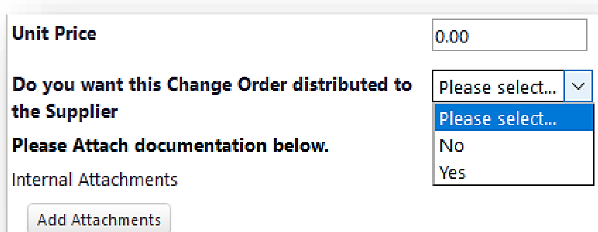
i) The "Quantity" is the ***new*** quantity of the PO. In this example we originally ordered 4 chairs. We are reducing line 2 of the PO by 3 chairs; therefore, our new quantity is 1.



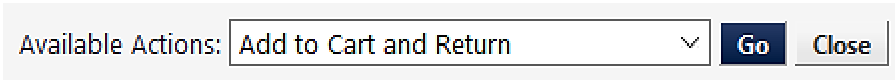
j) Unit Price:
   - If the change results in ***no change*** in the value enter ***zero*** in this field
   - If the change results in a ***decrease*** in the value enter ***zero*** in this field
   - If the change results in an ***increase*** in the value enter *only* the amount of the increase (***net change*** amount).

k) Using the down arrow indicate whether you want the Change Order sent to the supplier.

l) Attach any supporting documentation using the "**Add Attachments**" button.



If you need to make multiple changes to a Purchase Order use the "**Add to Cart and Return**" option in the **Available Actions** drop down menu at the top right of the form, and click "Go".

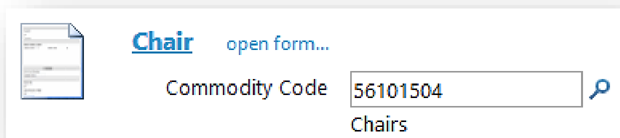


Once you have made all of the changes choose **Add and Go to Cart**.

B. *Submitting a Change Order*

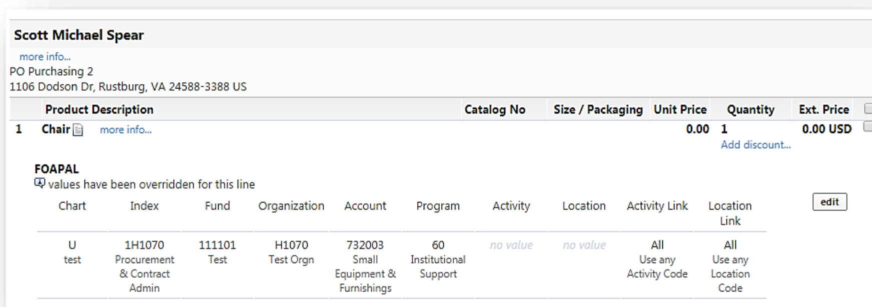
Complete all of the items just as if you are submitting a new requisition.

a) **Make sure that the commodity code matches the existing PO**.



b) Proceed to Checkout

c) Make sure that the FOAPAL matches the existing PO.



d) Submit the Requisition

C. *After Submission*

The change order will stop in an Initial Review. The approver in this step will evaluate the change order request to determine if it should be processed.

Once the change order has completed financial approvals and the NSF check it will be ready for the buyer to process. The old requisition is rejected once the PO has been processed.

IX. Receiving Goods and Services

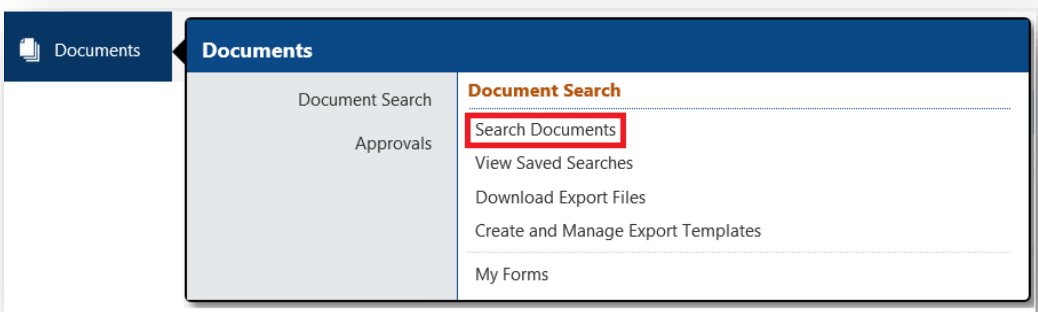
Receiving in buyLU allows users to track the receipt goods and services. Cart owners and approvers can create receipt documents. As items are received the cart owner would generate an electronic receipt document. Receipts are automatically populated with purchase order data so the user can easily reference order information and only need to enter a minimal amount of new data.

There are two types of receipts that can be created: Quantity receipts and Cost receipts. Quantity receipts maintain a running total of goods received.

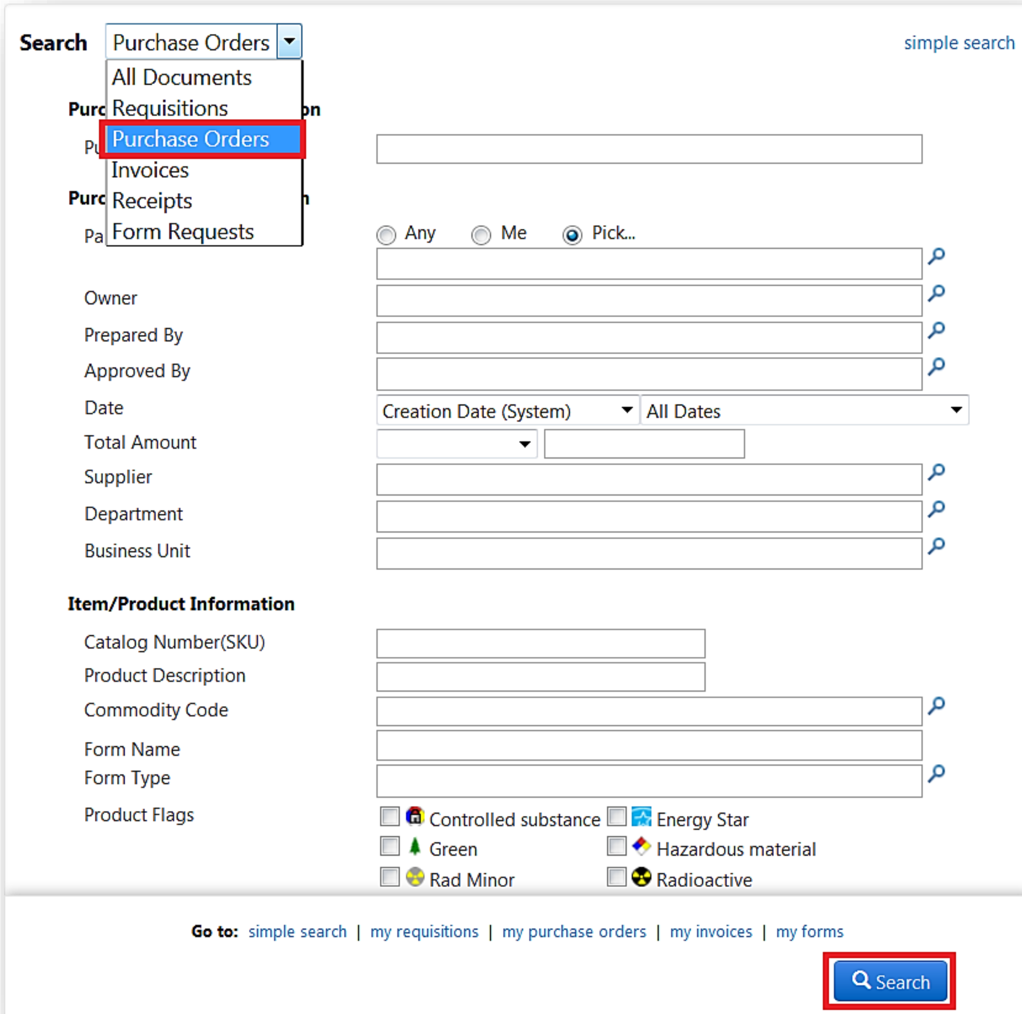
A. Reviewing Receipt Status

Document Search can be used to determine what orders have been placed and received. Either of the owners of the cart or the fund approver can create the receipts for that PO. If you can see the PO – then you are an owner on it.

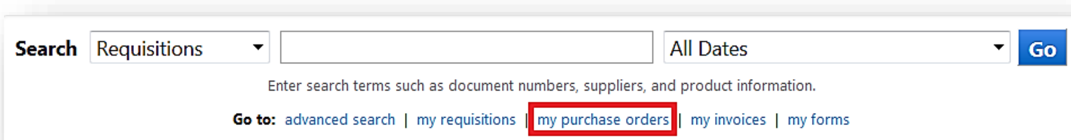
Select the "**Documents**" icon on the slide out menu then "**Document Search**" submenu – "**Search Documents**".



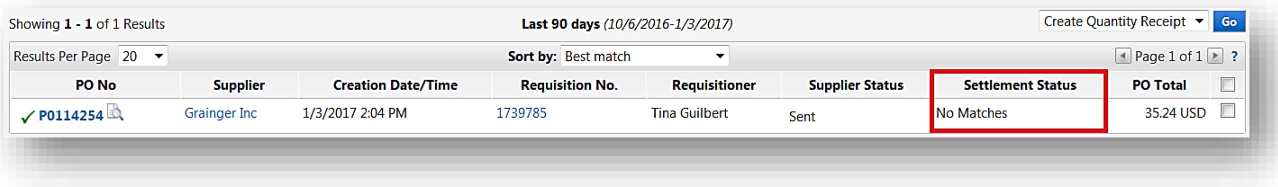
To view all of the PO's within your Fund/Org choose "**Purchase Orders**" from the search dropdown menu and click the "**Search**" button. All PO's will populate.



To view only your PO's click on "**My Purchase Orders**".



All PO’s created by the user will display, notice the Settlement Status column.



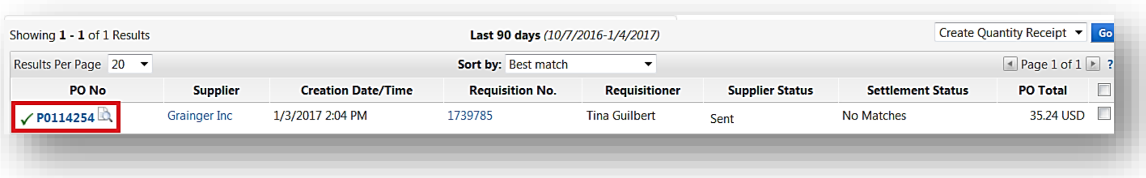
A list of the purchase orders meeting the search criteria display. The Settlement Status options related to receiving are listed below:

- Receipt Required – indicates a receipt is required for the order.
- Partially Received – indicates that part of the quantity of the order has been received
- Fully Received – indicates that the same quantity ordered has been received.
- Over Received – indicates that more items were received than originally requested.

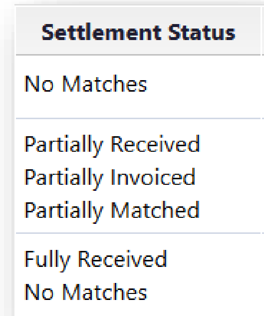
B. Creating a Receipt

In many cases all the goods requested are received in an order. Occasionally you may have multiple receipts for a single purchase order when some items ordered are on backorder or came later.

Access the PO that is associated with the goods being received. Open the purchase order by clicking the PO number.

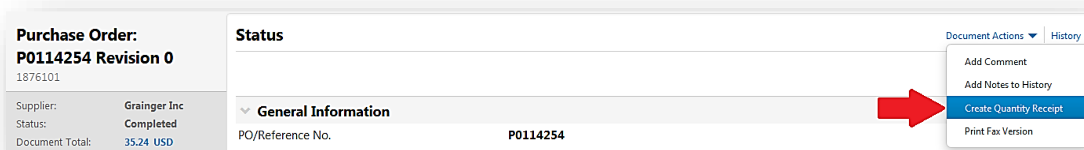


IMPORTANT: Best practice is to access the PO from the buyLU tool instead of the email notification. It is essential to check the "Settlement Status" of the PO before creating the receiving document.



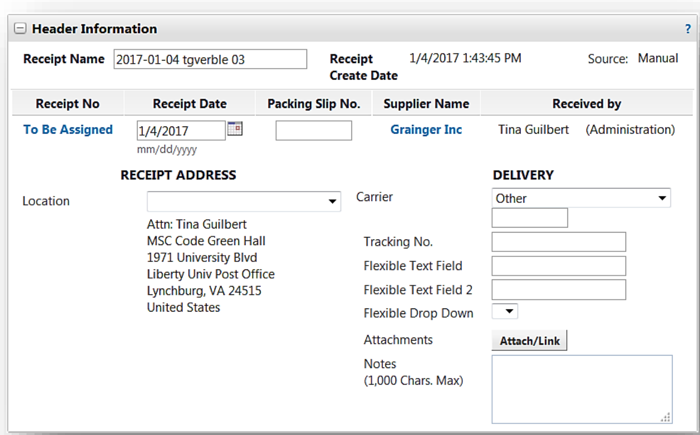
- **No Matches**: None of the items on the PO have been received
- **Partially Received**: Some of the items on the PO have been received (look at the invoice to view the items that have been received).
- **Fully Received**: All items on the PO have been received.

From the **Document Actions** dropdown menu, select **Create Quantity Receipt**.



Enter the applicable Header Information including:

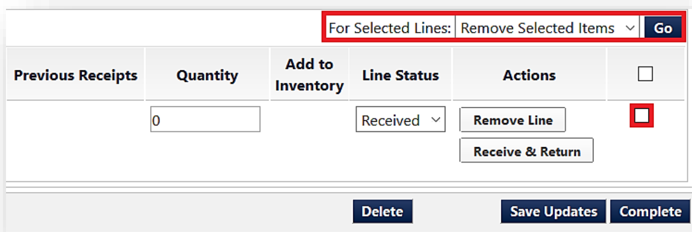
- Date Received
- Packing Slip No.
- Receipt Address (if incorrect)
- Delivery method and any notes



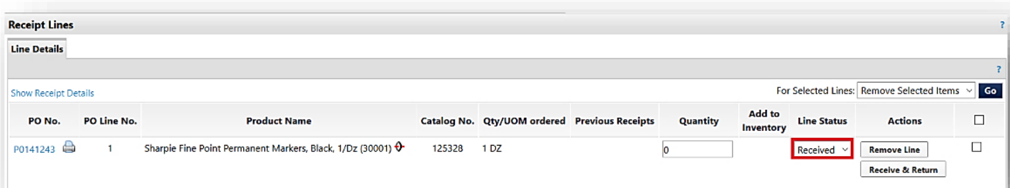
The receipt is automatically populated with the PO information, including the number of items to be received.

Indicate which items are received by utilizing the dropdown menu in the **Line Status** column.

If an item is NOT received, remove that line from the receipt. To remove a line from the receipt, click in the checkbox to the right of the line item. Go to the For Selected Lines action box and select **Remove Selected Items** and click **Go**. That line will be removed from the receipt being created.

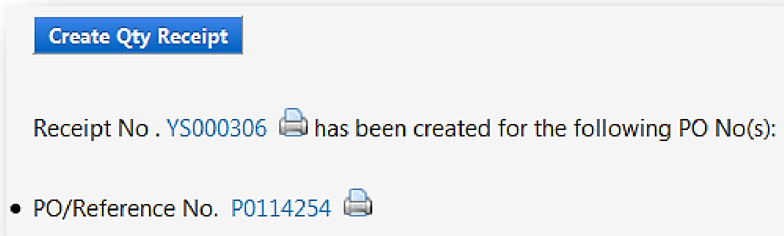


Enter the Quantity received in the quantity text box. Add notes if applicable.

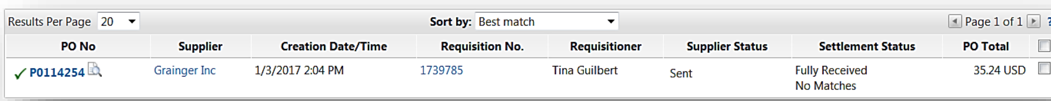


Click the **Save Updates** button. You are automatically brought to the top of the screen and click the **Complete** button.

The Receipt Number displays on the screen.



Now when you search for that PO again you will see in the Settlement Status that is PO is received.



If there are remaining items on the PO that need to be received at a later date then create a new receipt for those items. When you do so remove the lines that were included in the first receipt by clicking the checkbox to select the lines; **Remove Selected Lines** and click **Go**.

Click **Save Updates** then **Complete** to create the receipt.

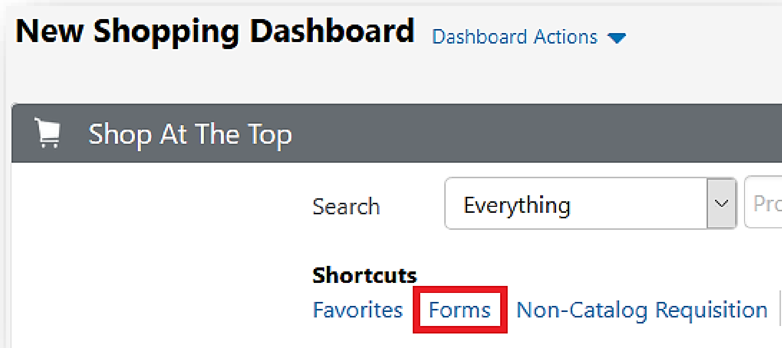
IMPORTANT: It is vital that the receiving process is done correctly in order for the invoice to be paid and the PO to close.

X. Encumbrances

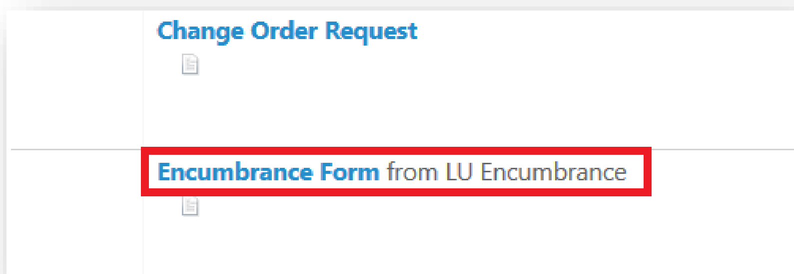
The encumbrance process should be used when invoices will need to be paid to multiple vendors for the same thing. This process was developed to replace the Banner encumbrance process.

A. *Creating an Encumbrance*

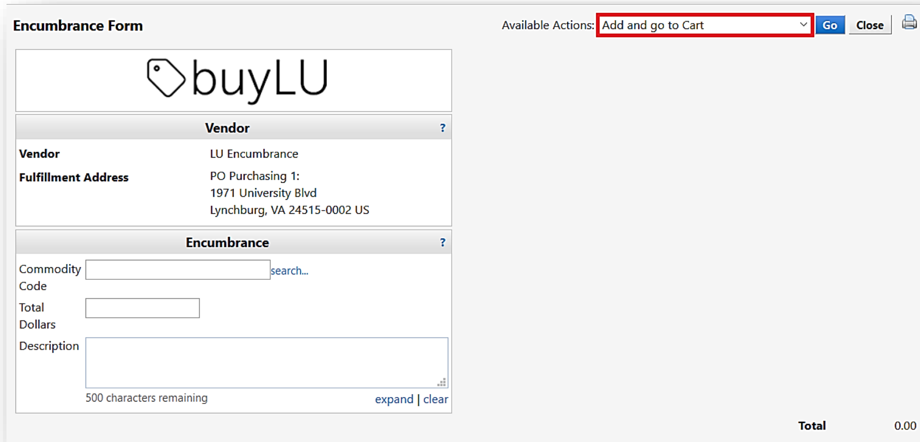
- Select **Forms** from the buyLU shortcut menu on the Home page.



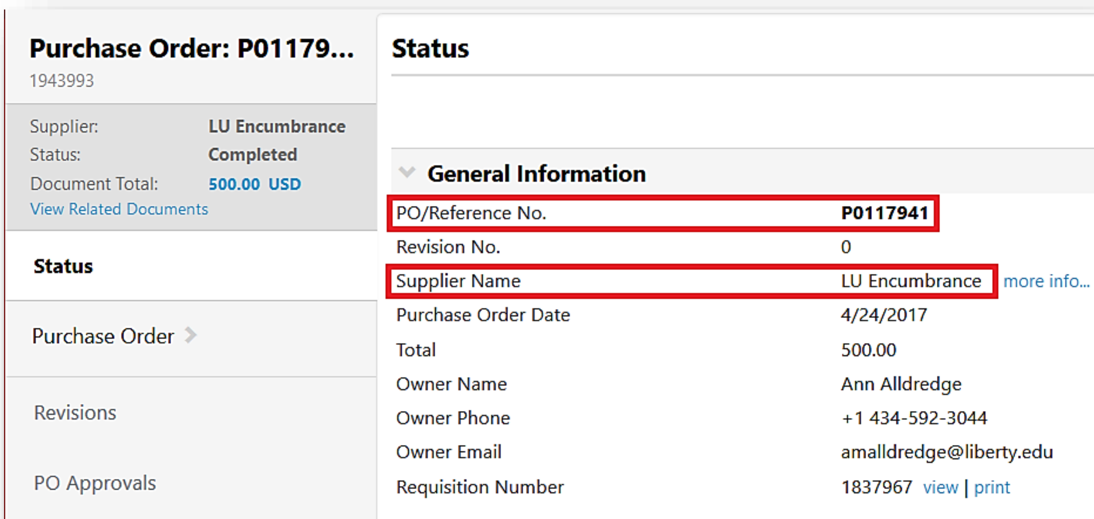
- Select **Encumbrance Form**



- Complete all of the fields in the form and select **Add and go to Cart** from the dropdown menu at the top right of the screen. Select **Go**.

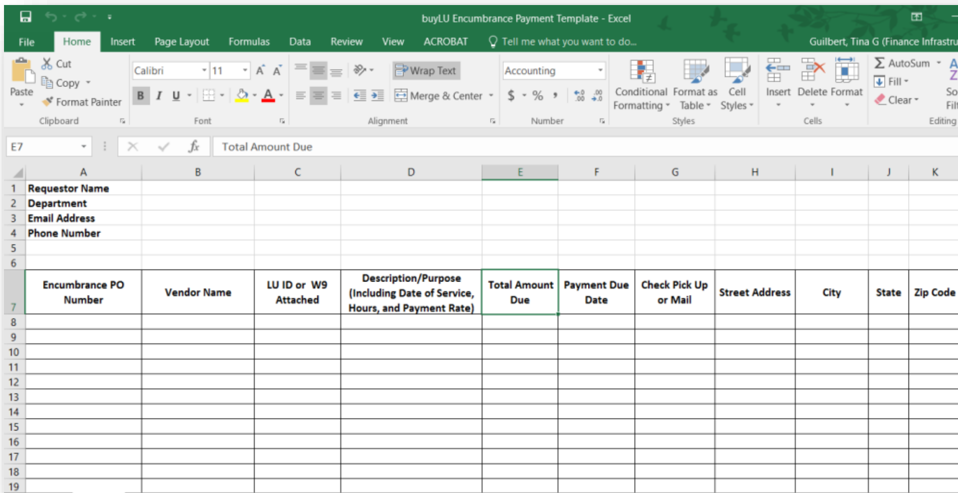


- Proceed to Checkout or Assign Cart
- Complete the Requisition and submit. Once financial approvals have been recorded a Purchase Order is created using the LU Encumbrance as the vendor.

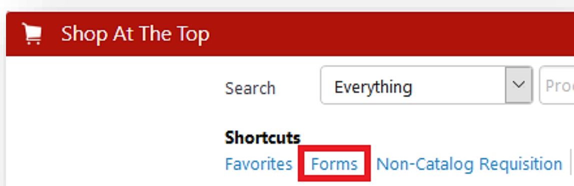


B. *Requesting Payment against an Encumbrance*

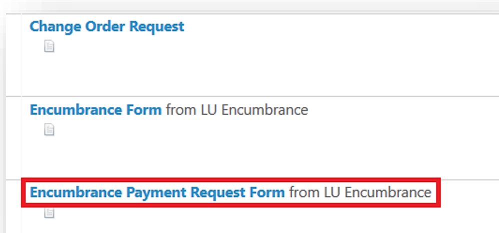
- Complete the buyLU Encumbrance Payment Template. This is a Microsoft Excel document. This document is located here.



- Select **Forms** from the buyLU Home page.

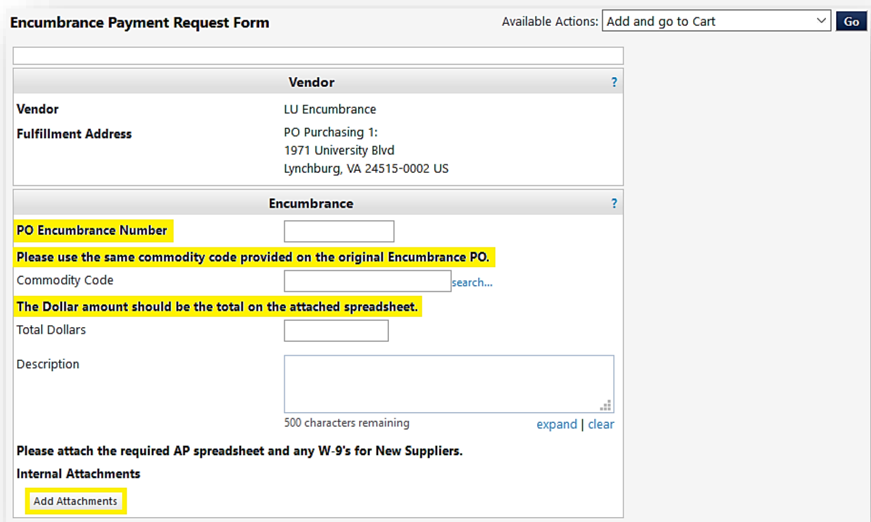


- Select Encumbrance Payment Request Form

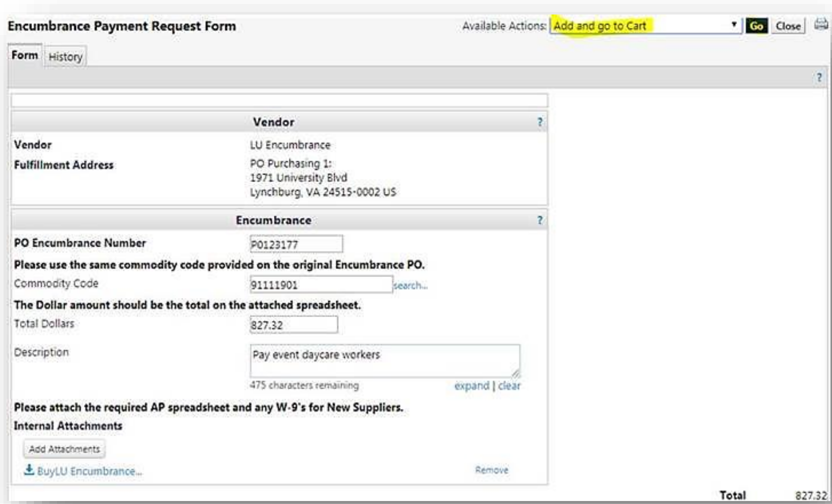


- Complete the form and attach the buyLU Encumbrance Payment Template. This will allow you to request checks for more than one individual.

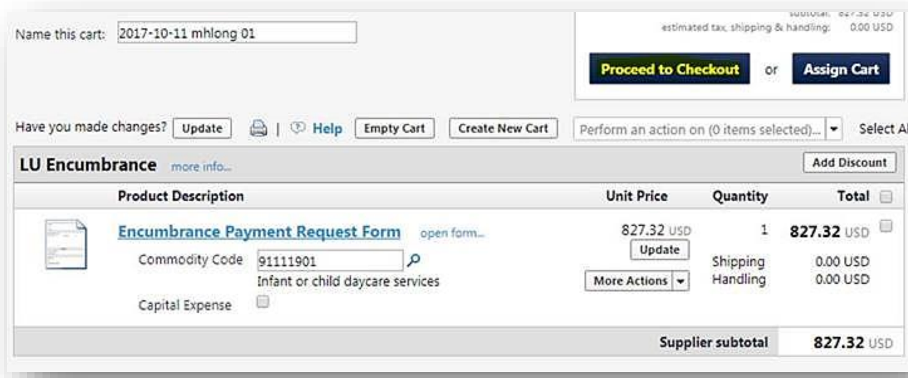
  IMPORTANT: Use the same commodity code that was used on the original Encumbrance purchase order.



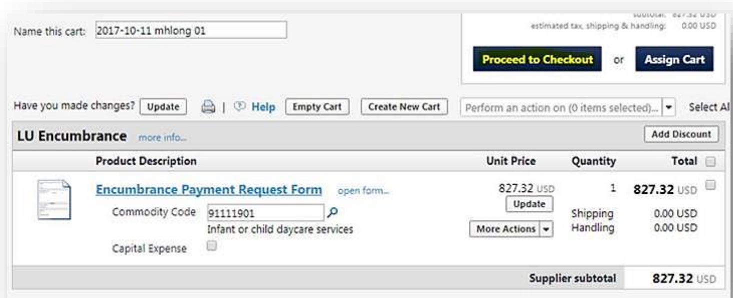
- Select Add and go to Cart. Then select "Go".



- Select **Proceed to Checkout**



- Enter the same FOAPAL information as was entered on the Encumbrance, then select **Submit Requisition**.



- Once approved the Encumbrance Payment Request will be processed by Accounts Payable.

C. *Change Encumbrances*

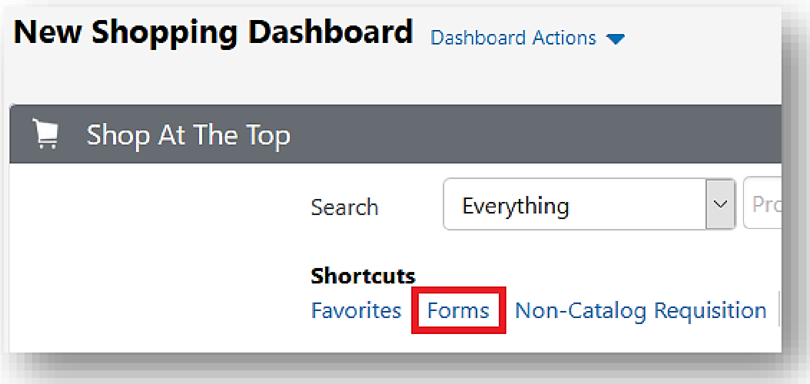
To change an encumbrance, follow the **Change Order** process.

XI. Payment Requests

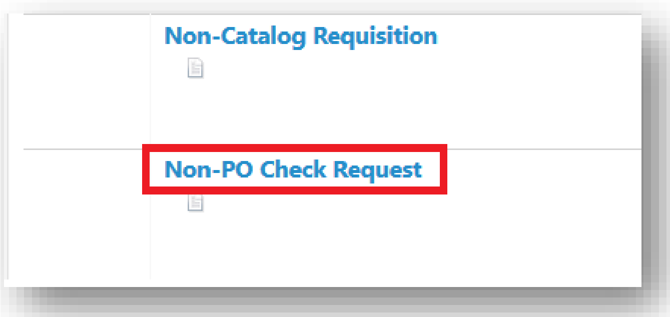
Payment Requests (PR) are used to request payment for vendor invoices if a Purchase Order was not obtained.

A. Creating a Payment Request

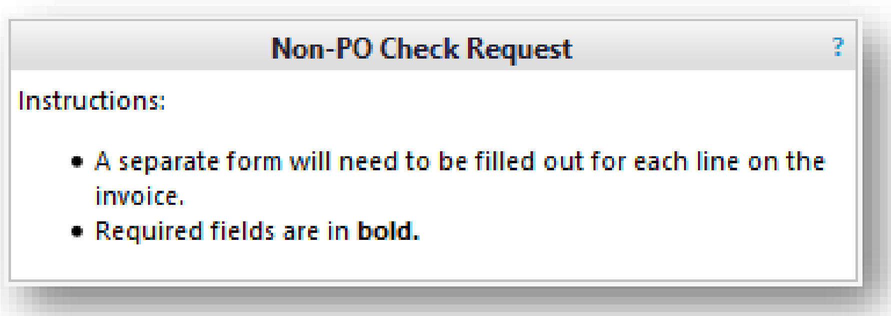
- Select **Forms** from the buyLU shortcut menu on the Home page.



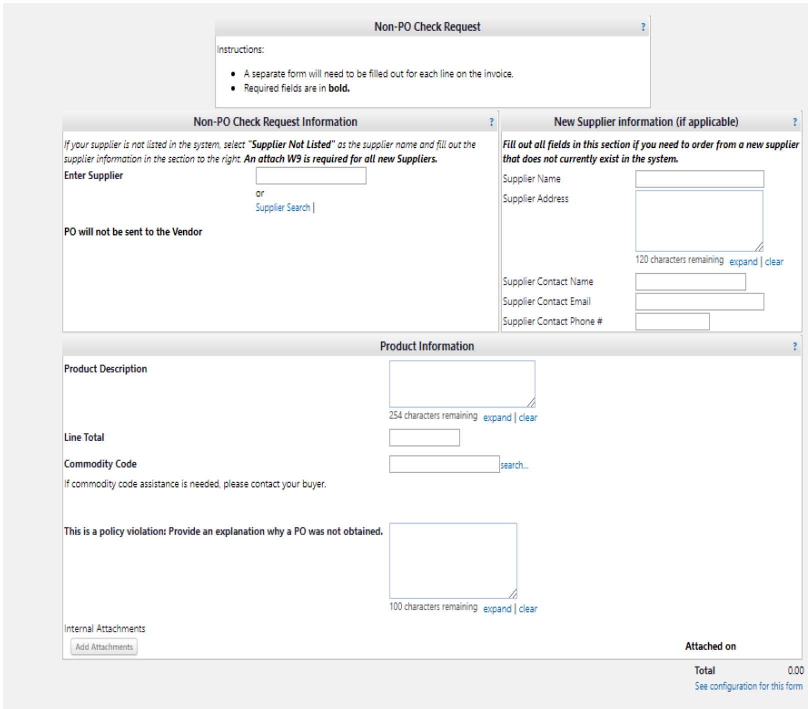
- Select Non-PO Check Request Form



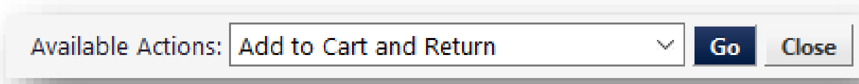
- Complete all of the fields in the form per the **instructions**.



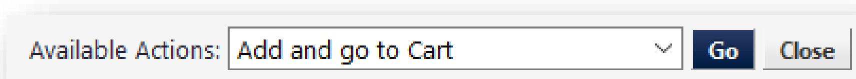
- Please enter the description of the product in the product description section (this field wraps text please do not enter returns).



- Keep in mind that a Payment Request is a policy violation.
- Each line of the invoice is submitted individually using **Add to Cart and Return** functionality.



- Once the form is complete add the invoice as an attachment and select **Add and go to Cart** from the dropdown menu at the top right of the screen. Select **Go**.



- Check out as usual.

ATTACHMENT 1

Assets - Capital & Non-Capital (AS) Assets are expenditures with a life expectancy greater than one year or improvements that extend the useable life of an asset and whose unit price meets the capitalization threshold.					
Description	**Account**	**Definitions**	**Capitalization Threshold**	**Location Required?**	**Index**
Computer	791012	Computers and any computer related items; excluding software and monitors less than 19"	Unit price is **greater** than $5,000	Yes	
	769020	Computer hardware/software related to capital projects	Unit price is less than or equal to $5,000	No	
	732003	Items of asset quality that do not meet inventory tracking criteria, but with a usable life over one year; including tools, small machinery, etc.	Unit price is less than or equal to $5,000	No	
Equipment - Audio Visual	791009	Audio visual equipment such as screens, projectors, and monitors greater than 19"	Unit price is **greater** than $2,500	Yes	
	769018	Audio visual equipment related to capital projects.	Unit price is less than or equal to $2,500	No	Yes
	732003	Items of asset quality that do not meet inventory tracking criteria, but with a usable life over one year; including tools, small machinery, etc.	Unit price is less than or equal to $2,500	No	
Equipment - Medical	791010	Health related equipment used in medical or athletic training offices.	Unit price is **greater** than $2,500	Yes	
	769018	Health related equipment used in medical or athletic training offices; related to capital projects	Unit price is less than or equal to $2,500	No	Yes
	732002	Health related items of asset quality that do not meet inventory training criteria, but with a usable life over one year.	Unit price is less than or equal to $2,500	No	
Equipment - Appliances	791008	Appliances such as refrigerators, microwaves, coffeemakers, washers, dryers, etc.	Unit price is **greater** than $2,500	Yes	
	769018	Appliances such as refrigerators, microwaves, coffeemakers, washers, dryers, related to capital projects	Unit price is less than or equal to $2,500	No	Yes
	732003	Items of asset quality that do not meet inventory tracking criteria, but with a usable life over one year; including tools, small machinery, etc.	Unit price is less than or equal to $2,500	No	
Equipment - Other	791008	Any equipment other than those listed in this section	Unit price is **greater** than $2,500	Yes	
	769018	Any equipment other than those listed in this section related to capital projects.	Unit price is less than or equal to $2,500	No	Yes
	732003	Items of asset quality that do not meet inventory tracking criteria, but with a usable life over one year; including tools, small machinery, etc.	Unit price is less than or equal to $2,500	No	
Furnishings	791011	Furnishings for offices, classrooms, egress, etc.	Unit price is **greater** than $2,500	Yes	
	769019	Furnishings for offices, classrooms, egress, etc related to capital projects.	Unit price is less than or equal to $2,500	No	Yes
	732003	Items of asset quality that do not meet inventory tracking criteria, but with a usable life over one year; including tools, small machinery, etc.	Unit price is less than or equal to $2,500	No	
Software	791013	Initial purchase of computer software	Unit price is **greater** than $2,500	Yes	
	769020	Computer hardware/software related to capital projects	Unit price is less than or equal to $2,500	No	
	732003	Items of asset quality that do not meet inventory tracking criteria, but with a usable life over one year; including tools, small machinery, etc.	Unit price is less than or equal to $2,500	No	
Software Subscription/License Renewal	712010	Software subscriptions, license renewals and maintenance contracts	All related expenses regardless of cost	No	