



## Purchasing Manual



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TRAINING CHAMPIONS FOR CHRIST SINCE 1971

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# Introduction

This manual will help users understand BuyLU processes and how to effectively use the BuyLU procurement system.

- If you need assistance beyond what this manual provides, please contact your buyer at 592-3012 or by email at [procurement@liberty.edu](mailto:procurement@liberty.edu).
- If you have questions regarding fund/org access or any other budget related issues, contact your budget analyst at [budget@liberty.edu](mailto:budget@liberty.edu).
- If you need help setting up a new supplier or submitting a supplier request, contact [suppliermanagement@liberty.edu](mailto:suppliermanagement@liberty.edu).
- If you require assistance in the contract request process, contact [contracts@liberty.edu](mailto:contracts@liberty.edu).
- If you experience technical issues with the BuyLU system, contact BuyLU support at [BuyLU@liberty.edu](mailto:BuyLU@liberty.edu).

## i. Overview of BuyLU Process

BuyLU is the eProcurement (purchasing) system for Liberty University. 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

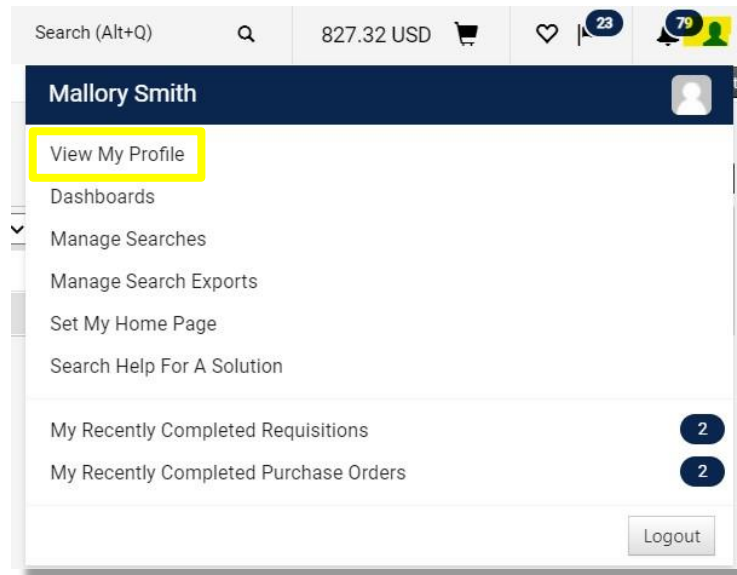
## ii. User Information and Settings

Users can access BuyLU through myLU or directly at [www.liberty.edu/BuyLU](http://www.liberty.edu/BuyLU). The main dashboard has information on system updates and resources for user assistance and training. Make sure to check the main dashboard regularly for new information.

### a. User Profile and Preferences

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. Below is an overview of the profile settings users should verify for accuracy or those they may edit.

At the top right-hand corner of the homepage, you will find a person-shaped profile icon. Click on the icon and a list of items will appear. Select **View My Profile**.



**i. User's Name, Phone Number, Email, Etc.**

This information is fed over from Banner. Review this section for accuracy.

A screenshot of a web form titled 'User's Name, Phone Number, Email, etc.'. The form contains several input fields: 'First Name' (Mallory), 'Last Name' (Smith), 'Phone Number' (+1 434-582-3216 ext.), 'Mobile Phone Number' (empty), 'E-mail Address' (fakedebug@liberty.edu), 'Business Unit' (Administration Operations (MBU000A30)), 'Department' (dropdown), 'Position' (dropdown), 'Authentication Method' (Netid dropdown), and 'User Name' (masmith82). There is a blue bar at the bottom of the form stating 'Organization Terms and Conditions accepted on 6/4/2020 8:42 AM Terms and Conditions'. A red 'Save Changes' button is located at the bottom right. A legend indicates that a star symbol (\*) denotes required fields.

**ii. Language, Time Zone and Display Settings**

Enter all applicable information. Users can create personal dashboards to display the information most essential for their needs and set their personal dashboard to be their homepage in BuyLU.

**Language, Time Zone and Display Settings**

Select a Language: English

Country: United States

Currency: USD

Time Zone: EDT/EST - Eastern Standard Time (US/Eastern)

Color Theme: LU Branded

Preferred email format: HTML

Access Training Content Configuration: ☐ Yes ☒ No

Home Page: ☒ Default ☐ Override [New Main Dashboard](#)

**Accessibility**

Enable Accessibility Mode: ☐ Yes ☒ No

Help on mouse over: [Show help on mouse over and click](#)

Enable Limited Animation: ☐ Yes ☒ No

[Save Changes](#)

### iii. App Activation Codes

This option contains an [Add Device](#) button which allows you to set up access to a Mobile or Microsoft Word2013 app.

**App Activation Codes**

Use the Add Device button below to generate a new activation code and start the registration process to gain access to the Mobile Device or Microsoft Word 2013 app. You will be required to enter a Device Name (i.e. iPhone, Android, computer name, etc) to help identify the device being registered.

[Add Device](#)

## b. Default User Settings

### i. 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 that are the most useful to users are **Codes** and **Code Favorites**.

- **Codes**: This area is populated with the user's "home" index code.

| Header (int.) Codes Code Favorites Internal Information ? |                  |                        |                      |
|---|------------------|------------------------|----------------------|
| Custom Field Name   | Default Value    | Description            | Edit Values          |
| Chart   | U                | Liberty University     | <a href="#">Edit</a> |
| └ Account   | No Default Value |                        | <a href="#">Edit</a> |
| └ Index   | 1H1005           | Finance Infrastructure | <a href="#">Edit</a> |
| └ Fund  | No Default Value |                        | <a href="#">Edit</a> |
| └ Organization  | No Default Value |                        | <a href="#">Edit</a> |
| └ Program   | No Default Value |                        | <a href="#">Edit</a> |

- **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.

|               |       |                       |                      |
|---------------|-------|-----------------------|----------------------|
| Header (int.) | Codes | <b>Code Favorites</b> | Internal Information |
|---------------|-------|-----------------------|----------------------|

Business Units: Administration Operations (MBU000A30) ▼

Use Code Favorites for quick access to accounting code combinations saved to your profile during checkout. You may create a new Code Favorite by clicking the "Add" button and entering a commonly used combination of accounting codes with or without splits. Code Favorites are accessed during checkout by editing the codes section or by selecting it as your default accounting codes in your profile.

[Add](#)

| FOAPAL ? |          |          |              |          |          |          |          |               |               |
|----------|----------|----------|--------------|----------|----------|----------|----------|---------------|---------------|
| Chart    | Index    | Fund     | Organization | Account  | Program  | Activity | Location | Activity Link | Location Link |
| no value | no value | no value | no value     | no value | no value | no value | no value | no value      | no value      |

## ii. 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.

**Default Addresses**

Ship To Bill To

Select an address to edit Select Addresses for Profile

**Shipping Addresses**

- 12th Street LU Receiving
- IT Software Compliance Office
- Liberty Univ Post Office

### iii. 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 Requester for 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.

**Cart Assignees**

Add Assignee...

My Cart Assignees

**User Search**

Last Name

First Name

User Name

Email

Business Unit  Business Unit Name

Department

Role

Results Per Page

### iv. Checkout Settings

This option allows the user to override his or her Checkout Settings. This option is only available for “Requesters” and “Approvers.”

**Checkout Settings**

Default Experience    ☐ Default    ☒ Override

Advanced Checkout  
Advanced Checkout  
Express Checkout

### 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. Users can view their assigned role by clicking [Assigned Roles](#).

#### i. 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 “Requester.”



*In order to become a Requester, the user must take Finance 100, Finance 102, and Finance 210. Once the courses have been completed, submit a BuyLU Permissions Request from the [Finance Portal](#) and attach approval from your level 4, 6, or 8 financial approver or ask the financial approver to submit the request on your behalf. Once we have verified the information in your request, we will forward your request to IT so the permissions can be granted. Once the permissions are granted successfully, it will take overnight for your new permissions to be available in BuyLU.*

#### ii. Requester

A Requester can do all that a Shopper can but is also able to submit carts on behalf of the Shopper. After submission (checkout) the cart will go through an approval process.

#### iii. Approver

An Approver is a user designated to electronically review 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 return it if it is not acceptable. Approvers are assigned in Banner and integrated into BuyLU. If approver changes are needed, contact Financial Planning and Budgeting at [budget@liberty.edu](mailto:budget@liberty.edu).



***Note: Everyone with the correct fund/org access will be able to view all of the requisitions that require approval; however, only those in the queue will be able to approve them.***

#### iv. 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](#) under User Roles and Access.

### 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 for reference only. User’s permission settings will vary considerably depending on the individual’s role and the administration’s settings.***

#### i. Shopping, Carts and 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.

Select the “?” to view the definition for the permission

**Permissions:**  
**Shopping, Carts & Requisitions**

| ▼ 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                          | ? | ✓     |
| Administer Shared Favorites                          | ? | ✓     |
| Create Shared Favorites Folders                      | ? | ✓     |
| Import/Export and Administer Shared Favorites        | ? | ✓     |
| View Product Compare                                 | ? | ✓     |
| Chemical ReSource                                    | ? | ✓     |
| Antibody ReSource                                    | ? | ✓     |

## ii. Orders

▼ My Orders/Organization Orders [Edit Section](#) [Show T](#)

| Permission                                       |   | Value |
|--|---|-------|
| View Organization Orders                         | ? | ✓     |
| Edit Organization Orders                         | ? | ✓     |
| View My Business Unit Orders                     | ? | ✗     |
| View My Department Orders                        | ? | ✓     |
| Revise PO  | ? | ✓     |
| Update Purchase Order Owner                      | ? | ✓     |
| Close purchase orders                            | ? | ✓     |
| Open purchase orders                             | ? | ✓     |
| Resend PO to Supplier                            | ? | ✓     |
| Resend PO to External System                     | ? | ✓     |
| Export Search Results                            | ? | ✓     |
| Create/Manage My Custom Export Templates         | ? | ✓     |
| Share My Custom Export Templates                 | ? | ✓     |
| Administer All Custom Export Templates           | ? | ✓     |
| Manage Company Exports                           | ? | ✓     |
| Manage Order Failure Notifications               | ? | ✓     |
| Manage Business Unit Order Failure Notifications | ? | ✓     |
| Search History By Approver                       | ? | ✓     |
| Revise Purchase Order Number                     | ? | ✓     |
| View Sensitive Credit Card Details               | ? | ✓     |

### iii. 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 | ? | ✗     |

### iv. Contracts

#### Permissions: Contracts

| Contracts Permissions       |   |       |
|-----------------------------|---|-------|
| Permission                  |   | Value |
| Contract Configuration      | ? | ✗     |
| Contract Administrator      | ? | ✗     |
| Contract Manager            | ? | ✗     |
| Administer Projects         | ? | ✗     |
| Manage Contract Obligations | ? | ✗     |

### v. 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    | ? | ✗     |

User Permissions are based on the User Role assigned. If enhanced permissions are desired, a level 4, 6 or 8 approver in your department must email

BuyLU@liberty.edu requesting the permission level desired with the user's name, username and home index code. Successful completion of Finance 100, 102 and 210 is required before enhanced permissions can be granted.



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

## vi. Accounts Payable

| Permissions: Accounts Payable                                   |   |       |
|---|---|-------|
| ▼ Accounts Payable  |   |       |
| Permission  |   | Value |
| AP Configuration  | ? | ✓     |
| Create Receipts   | ? | ✓     |
| View Receipts   | ? | ✓     |
| Reopen Completed Receipts                                       | ? | ✓     |
| Enable Blind Receiving - (Hide Order Quantity during receiving) | ? | ✗     |
| View My Invoices  | ? | ✓     |
| View Organization Invoices                                      | ? | ✓     |

## vii. Supplies Manager (Inventory)

### Permissions: Supplies Manager

| ▼ Inventory Management   |   |       |
|--------------------------|---|-------|
| Permission               |   | Value |
| Manage Locations         | ? | ✗     |
| Inventory Search         | ? | ✗     |
| Inventory Administration | ? | ✗     |
| Adjust Inventory         | ? | ✗     |
| Replenishment            | ? | ✗     |
| Cycle Counting           | ? | ✗     |
| Show Kiosk Mode link     | ? | ✗     |

## viii. Custom Fields

This area allows users to view various custom field access and permissions. These are set up when the user's profile is set up.

## ix. Mobile

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

### Permissions: Mobile

| Mobile Access            |   |       |
|--------------------------|---|-------|
| Permission               |   | Value |
| Login from Mobile Device | ? | ✓     |
| Mobile Shopping          | ? | ✗     |

## 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:

|                                |   |
|--------------------------------|---|
| User Profile and Preferences   | > |
| Update Security Settings       | > |
| Default User Settings          | > |
| User Roles and Access          | > |
| Ordering and Approval Settings | > |
| Permission Settings            | > |
| Notification Preferences       | < |
| Administration & Integration   |   |
| Shopping, Carts & Requisitions |   |
| Change Requests                |   |
| Purchase Orders                |   |
| Catalog Management             |   |
| Accounts Payable               |   |
| Receipts                       |   |
| Contracts                      |   |
| Supplies Manager               |   |
| Sourcing Director              |   |
| Supplier Management            |   |
| Form Requests                  |   |
| Budget Manager                 |   |
| User History                   | > |
| Administrative Tasks           | > |

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 learn when a notification or email will be sent.

Mallory Smith

User Name masmith82

User Profile and Preferences

Update Security Settings

Default User Settings

User Roles and Access

Ordering and Approval Settings

Permission Settings

Notification Preferences

Administration & Integration

Shopping, Carts & Requisitions

Change Requests

Purchase Orders

Notification Preferences: Shopping, Carts & Requisitions

The in-application notifications are not yet available for all Email Notifications.

Prepared By - Cart Assigned Notice

None

An email is sent to the prepared by user when the applicable active cart has been assigned to the appropriate user for approval.

Prepared By - PR rejected/returned

None

Cart Assigned Notice

None

Receive PR and PO notifications for Carts Assigned to Me

None

Assigned Cart Processed Notification

None

Assigned Cart Deleted Notification

None

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

[Edit Section](#) ?

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

Notification Preferences: Shopping, Carts & Requisitions

The in-application notifications are not yet available for all Email Notifications.

Prepared By - Cart Assigned Notice

☐ Default
☒ **Override**

None

None

Email

Prepared By - PR line item(s) rejected

☒ Default
☐ Override

Prepared By - PR rejected/returned

☒ Default
☐ Override

None

## g. User History

When an action is taken with a user, information will be stored in the “History” tab. The History tab will display all actions taken in the user profile, the date of the action and who performed the action including any permissions that have been granted or removed.

### View User's History

Click to filter history ? Export CSV

Results Per Page 20 Records Found: 42 Page 1 of 3 ?

| Date                | User | Action              | Section        | Selection               | Field         | Old Value | New Value  |
|---------------------|------|---------------------|----------------|-------------------------|---------------|-----------|--|
| 4/7/2022 3:04:36 PM |      | Code Favorite Added | Code Favorites | Nickname : Split Foapal | Location Link | empty     | All : 80.0% of Price  All ...<br><a href="#">more...</a> |
| 4/7/2022 3:04:36 PM |      | Code Favorite Added | Code Favorites | Nickname : Split Foapal | Activity Link | empty     | All : 80.0% of Price  All ...<br><a href="#">more...</a> |
| 4/7/2022 3:04:36 PM |      | Code Favorite Added | Code Favorites | Nickname : Split Foapal | Location      | empty     | empty : 80.0% of Price  em...<br><a href="#">more...</a> |
| 4/7/2022 3:04:36 PM |      | Code Favorite Added | Code Favorites | Nickname : Split Foapal | Activity      | empty     | empty : 80.0% of Price  em...<br><a href="#">more...</a> |

### iii. BuyLU Navigation

The screenshot shows the 'New Main Dashboard' of the BuyLU system. Numbered callouts highlight the following features:

- 1:** Left sidebar navigation menu with icons for Home, Shopping, Approvals, Accounts Payable, Contracts, and Supplier Manager.
- 2:** Search bar in the 'Shop At The Top' section.
- 3:** Search icon in the bottom left corner.
- 4:** User profile icon and 'Logout' button in the top right.
- 5:** Heart icon (favorites) in the top right.
- 6:** Notification bell icon in the top right.
- 7:** Currency display (827.32 USD) in the top right.
- 8:** Search (Alt+Q) button in the top right.
- 9:** 'New Main Dashboard' title and navigation links at the top.

The dashboard content includes a 'Shop At The Top' section with a search bar, a 'buyLU Message Board' with a feedback notice, and a grid of dashboard tiles for Shopping, Approvals, Accounts Payable, and Contracts.

#### 1. Homepage

The main dashboard is the first screen that BuyLU users will see. There are five icons linked to commonly used dashboards for quick access: Shopping, Approvals, Accounts Payable, Contracts and Supplier Manager.



Clicking this icon will take the user to the Shopping dashboard where users can create a new order, view their draft carts, requisitions, purchase orders and items for approval.



Clicking this icon will take the user to the Approvals dashboard where users can view items needing their approval, action items needing their attention and unmatched invoices needing resolution.



Clicking this icon will take the user to the Accounts Payable dashboard where users can view the current status of invoices and those that require receipts.



Clicking this icon will take the user to the Contracts dashboard where users can search for contracts or view the current status of a contract.









Clicking this icon will take the user to the Supplier Manager dashboard where users can view the current status of a requested supplier or search for active suppliers.



***Note: Training videos for dashboard usage are available on the message board of the main BuyLU homepage.***

## 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.

| Menu Icon   | Description  |
|---|--|
|  | Clicking on the homepage icon will take the user to the main dashboard or whatever page they have set to be their homepage.                                    |
|  | The shop menu contains all shopping related options including product quick search, access to the main shopping dashboard, forms, favorites, carts and orders. |
|  | The orders menu contains options for searching orders in any stage of processing, as well as, accessing a user's personal orders and approvals.                |
|  | The contracts menu contains options for searching, creating and viewing contracts and related contract information.  |
|  | The accounts payable menu contains options relevant to AP including invoice and receipt creation and management.   |
|  | The suppliers menu contains options necessary for LU to manage suppliers' information including creation of new suppliers.                                     |

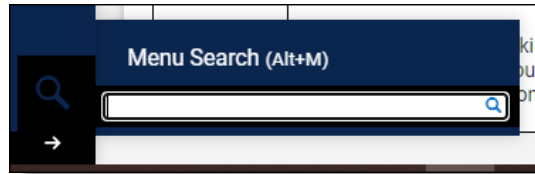




The sourcing menu contains options for creating, editing, and monitoring sourcing events and RFQ, RFI, and Auctions

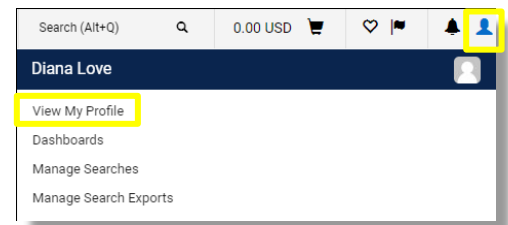
### 3. Menu Search

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.



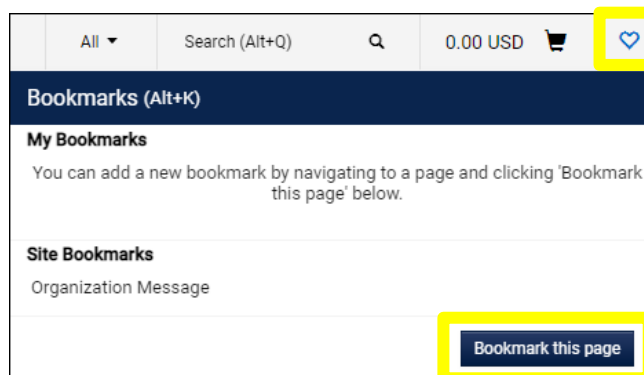
### 4. User Profile

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



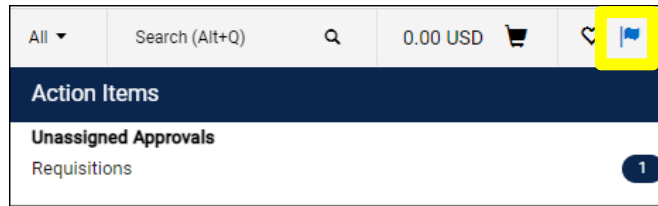
### 5. Bookmarks

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



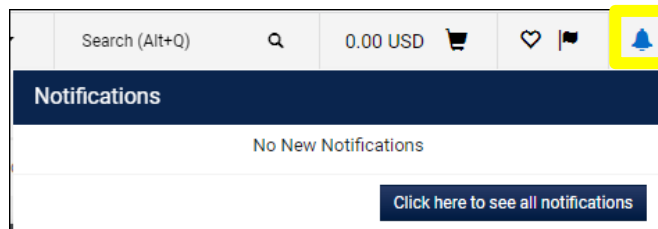
### 6. Action Items

Located on the left-hand side of the Homepage, provides a quicklink to recent and completed Carts, Requisitions, and Purchase Orders.



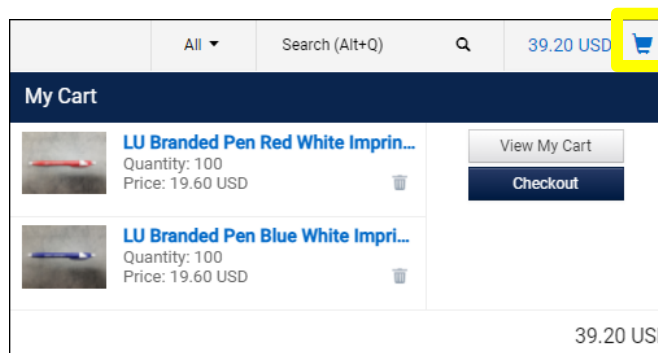
## 7. Notifications

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.



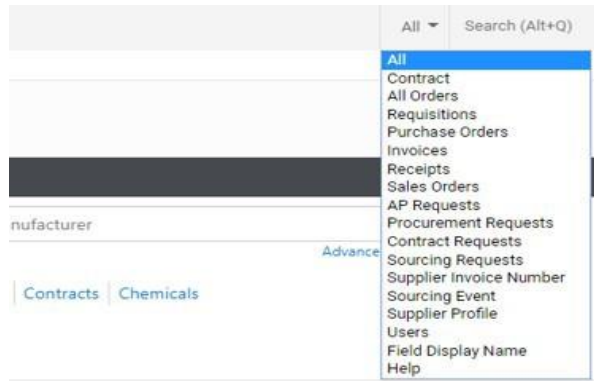
## 8. Cart Preview

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



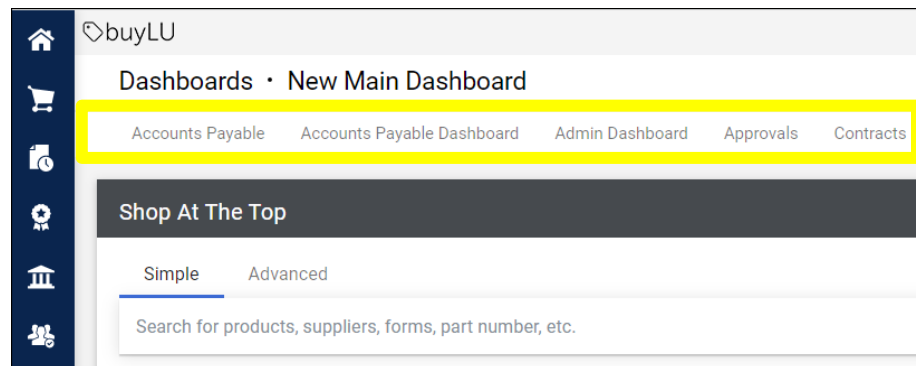
## 9. Quick Search

This icon is available from all pages and utilizes a drop-down menu. Users can search on any of the available options. Using the search box with “All” selected is ideal for searches in every area of BuyLU.



## 10. Dashboard Tabs

These tabs allow you to navigate to the dashboard that you desire. Some of these tabs will not be available to all users.



**Shopping:** This dashboard allows users to add items to their cart and create their requisition.

**Approvals:** This dashboard allows users to see anything that is waiting on their approval, as well as invoices that require attention before they can be paid.

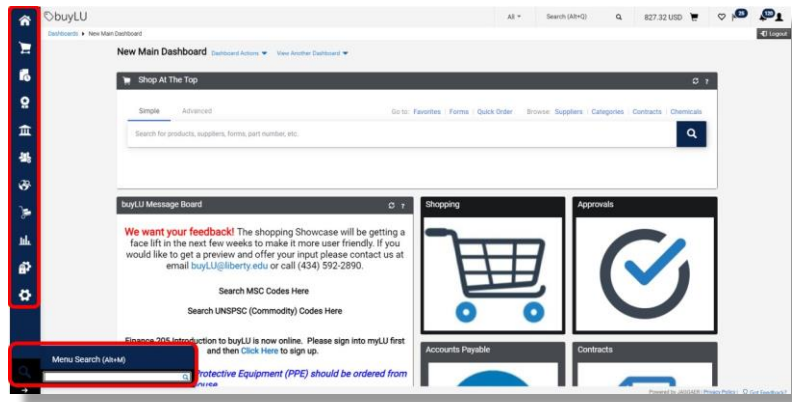
**Accounts Payable:** This dashboard shows department invoices in different stages of processing.

**Contracts:** This dashboard allows users to search contracts as well as see where their contract submissions are in workflow.

**Supplier Manager:** This dashboard allows users to create supplier requests and search for suppliers. It also shows if a supplier has started the ePayables process.

#### iv. 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 than others.

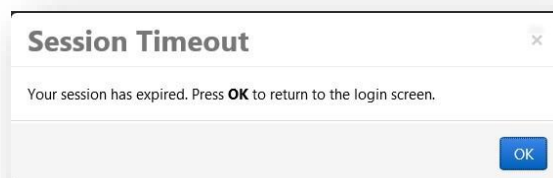
#### v. General Information

##### 1. The Back Button

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

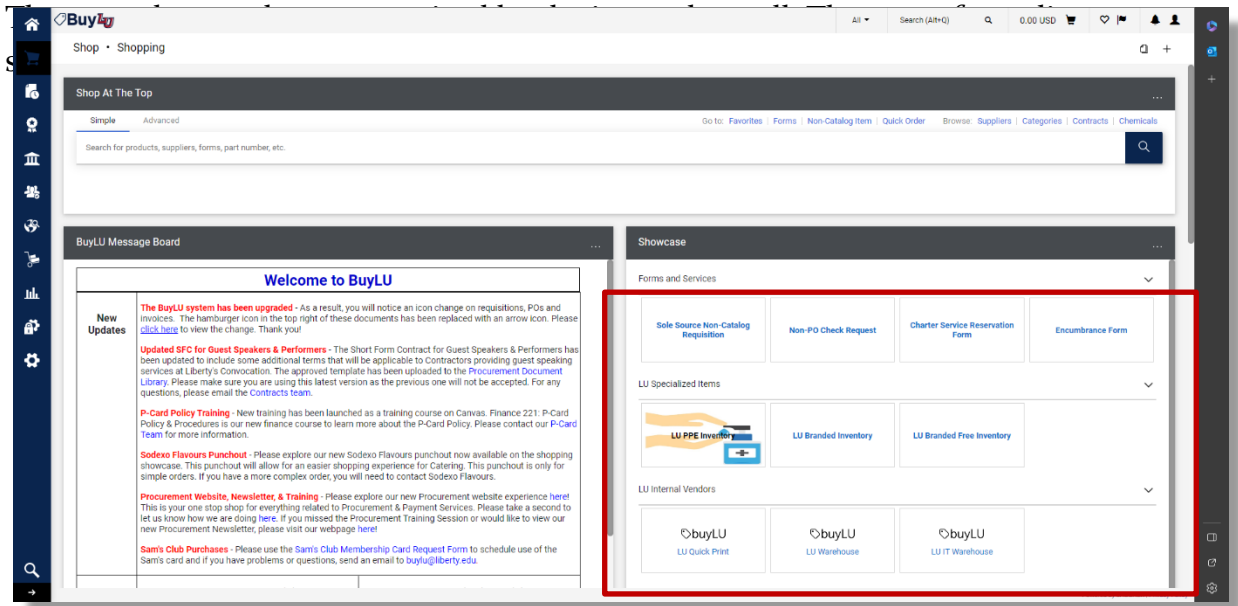
##### 2. Time Out Sessions

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

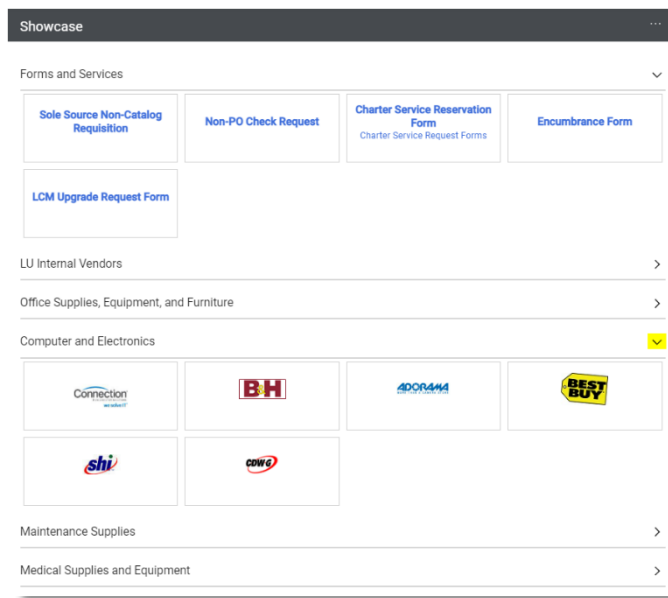


#### vi. Suppliers in BuyLU

There are two primary types of suppliers in BuyLU, non-catalog suppliers and catalog suppliers. Catalog suppliers are shown under each category folder in the showcase.



To open each category, click the arrow along the right side of each folder. This will open the category of your choice and show you the vendors within it.



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

## 1. Amazon

Users who are placing their first order through a “punch-out” to Amazon will be required to set up a business account. To set up the account click the Amazon tile.

Office Supplies, Equipment, and Furniture



Sign in to join Amazon Business.

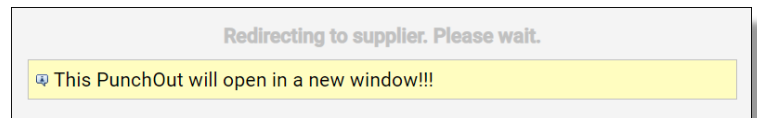
We already have an Amazon account with your email address. Please sign in to see your options.

Email or mobile phone number

Password [Forgot your password?](#)

By continuing, you agree to Amazon's [Conditions of Use](#) and [Privacy Notice](#).

☐ Keep me signed in. [Details](#) ▾



A new window will open in your browser. If the window does not open, check to make sure your browser is not blocking pop ups.

If you already have an Amazon account associated with your Liberty email address, you will need to create a new business account. Create a password, and click **Create account**. On the last screen click **Complete**.

amazonbusiness

Almost complete!

Your account changes have been saved. **username@liberty.edu** will be your account for business.

amazonbusiness

Create an account for business

Your name

Email

Password

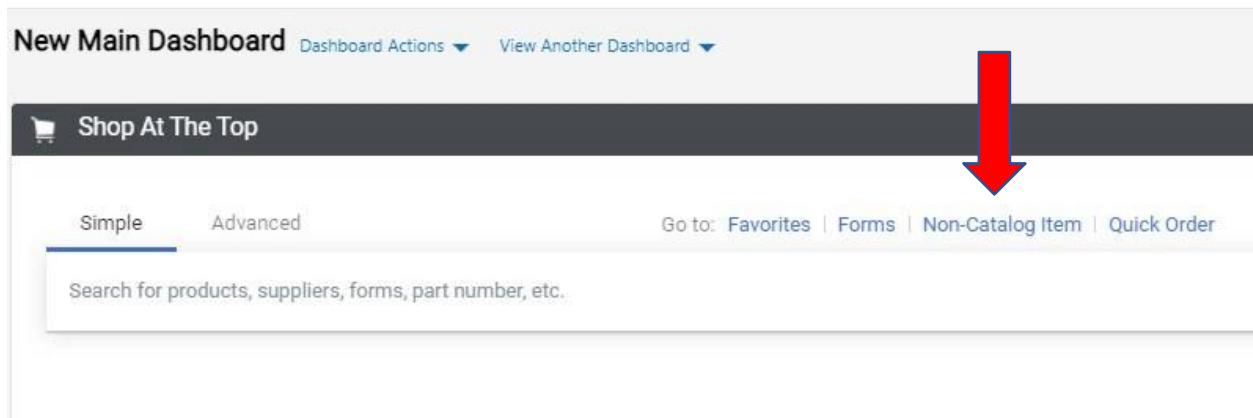
Confirm password



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

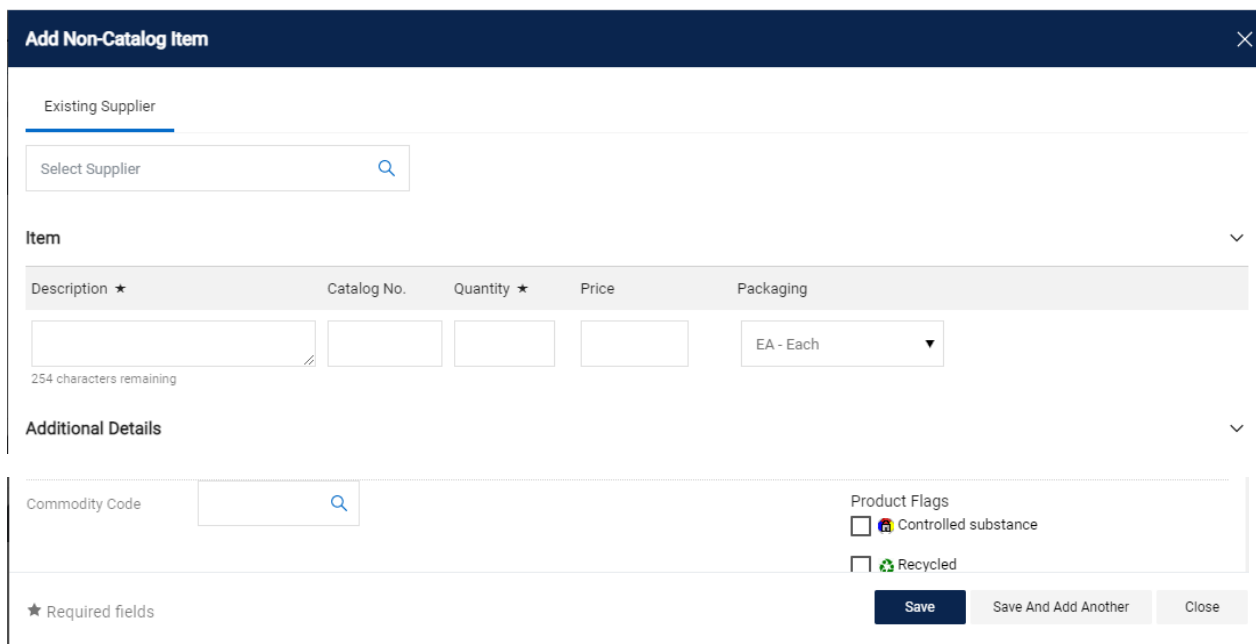
### a. Non-Catalog Suppliers

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 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 requisition workflow process.



The screenshot shows the 'New Main Dashboard' with a dark header bar containing 'Shop At The Top' and a shopping cart icon. Below the header, there are tabs for 'Simple' and 'Advanced'. To the right, there are links: 'Go to: Favorites | Forms | Non-Catalog Item | Quick Order'. A red arrow points down to the 'Non-Catalog Item' link. Below the links is a search bar with the placeholder text 'Search for products, suppliers, forms, part number, etc.'.

### vii. The Non-Catalog Item

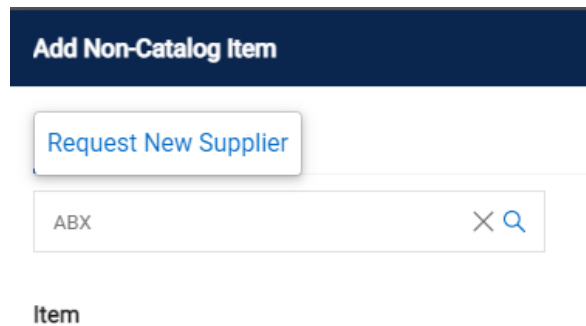


The screenshot shows the 'Add Non-Catalog Item' form. It has a dark blue header with the title and a close button. The form is divided into sections: 'Existing Supplier' with a 'Select Supplier' search box; 'Item' with a table for adding items; and 'Additional Details' with a 'Commodity Code' search box and 'Product Flags' for 'Controlled substance' and 'Recycled'. At the bottom, there are buttons for 'Save', 'Save And Add Another', and 'Close'. A legend indicates that fields with a star are required.

| Description ★        | Catalog No.          | Quantity ★           | Price                | Packaging |
|----------------------|----------------------|----------------------|----------------------|-----------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | EA - Each |

### 1. Select Supplier

The **Select Supplier** section allows the user to either type the name or LU ID of the supplier they need. When entering the name, if the system does not find a match, the **Request New Supplier** option will appear.



Add Non-Catalog Item

Request New Supplier

ABX

Item

### 2. Description, Catalog No., Quantity, Price, and Packaging

In this section a description of the product is entered along with the catalog number (optional), the quantity desired, the price of a single item and the packaging size of that item.

### 3. Commodity Codes

There is a section for users to enter the Commodity Code.

- For best results go to the “Search UNSPSC (Commodity)Codes Here” link in the BuyLU Message Board.

|          |   |
|----------|---|
| Weblinks | <p>MSC Codes</p> <p><b>UNSPSC (Commodity) Codes</b></p> <p>Liberty University Whistleblower Portal</p> <p>Non-Discrimination Policy</p> |
|----------|---|



**Note: Commodity Codes in BuyLU are based on the item’s manufacturer’s Universal Product Code. These codes are not the same Commodity Codes that are used in Banner or Infor.**



#### 4. Completing the Form

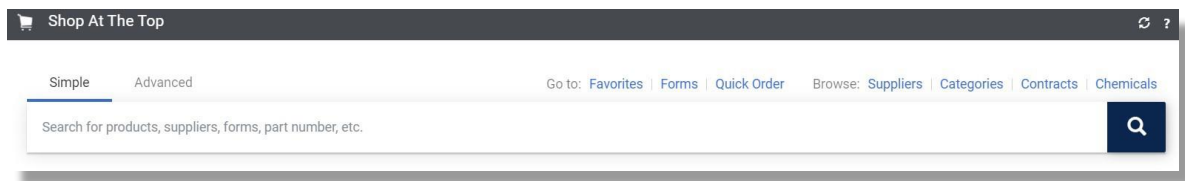
Users complete the form by utilizing one of the available selections at the bottom of the form.

- **Save:** The item will be added to the cart. Use this option if only one item is ordered.
- **Save and Add Another:** 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.
- **Close:** The information entered on the form will not be saved.

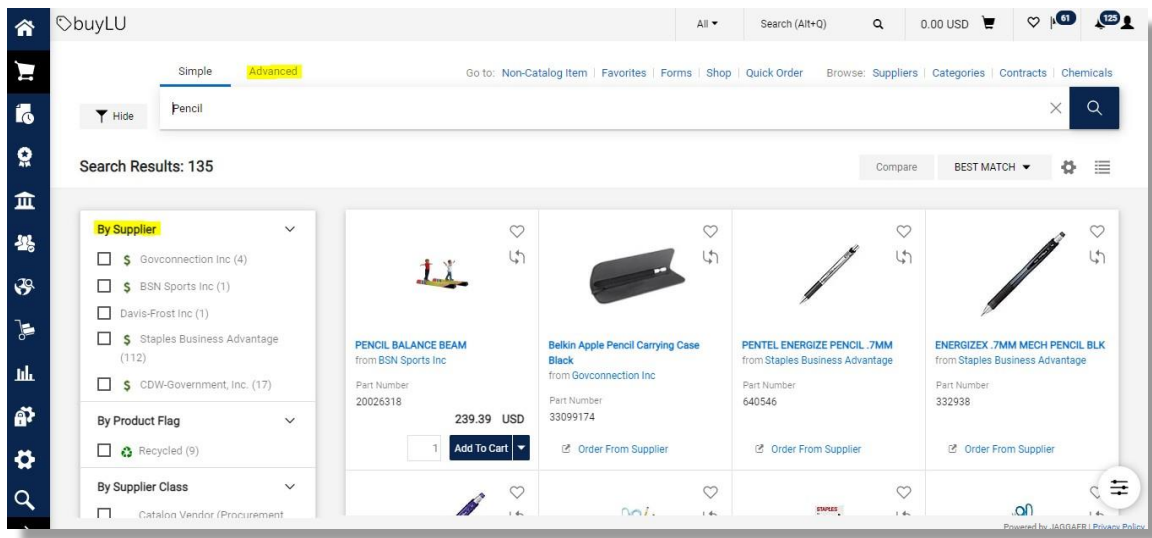
#### viii. Product Searches


Locating products in BuyLU can be achieved in several ways. A user can select a vendor within the Showcase on the Shopping Homepage and search for an item specifically from that supplier.

A user can also search directly from the BuyLU main dashboard. Enter the name of the item for which you are searching and press the “search” key. You can use the simple search or the advanced tab for a more detailed search.



The search returns results from each vendor that contains that particular product information and the number of results. Preferred vendors would come to the top of this list. Change to **Advanced** to refine and filter your search.



The search results display the product list. 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 select the  and add to favorites.

Once you determine the product you want to purchase, simply click the [Add to Cart](#) or [Order from Supplier](#) link, whichever presents.

## ix. Shopping Carts

### a. Shopping Cart Functions

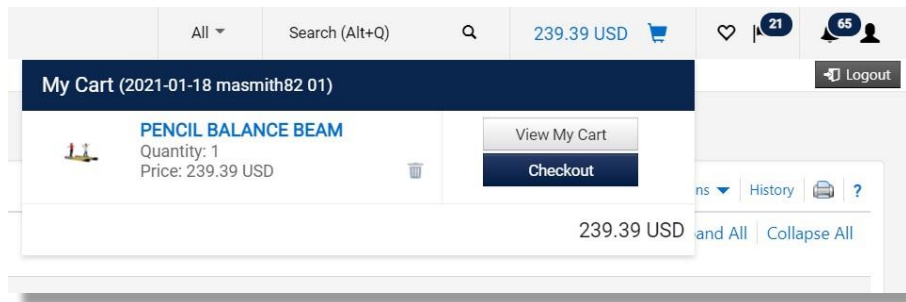
#### 1. Creating a new cart

A cart is created when an item is added

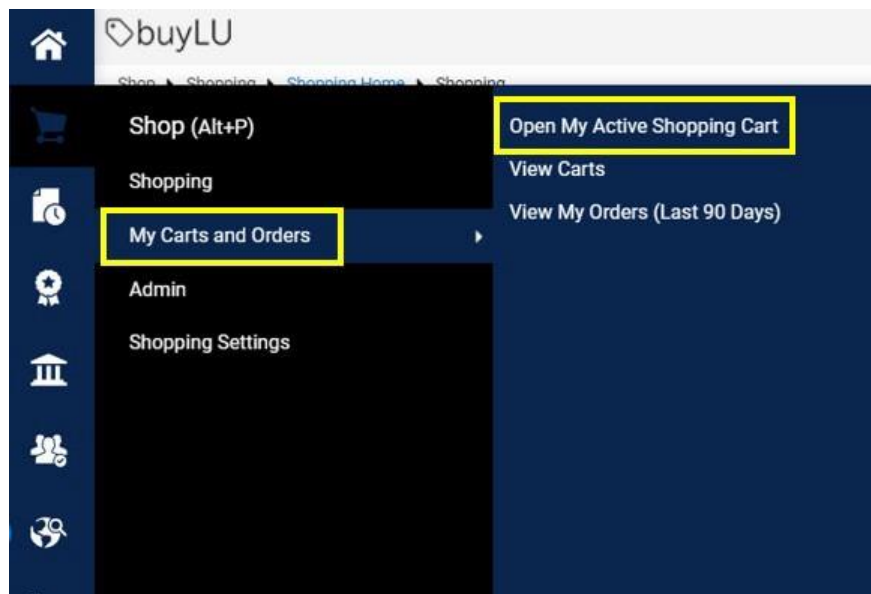
- Search for an item
- Verify the quantity
- Select option [Add to Cart](#)
- User has now created a cart

#### 2. Viewing the cart

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



Or you can 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.

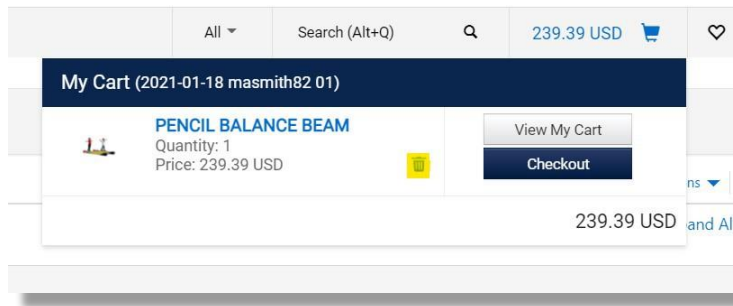
### 3. Adding items to the cart

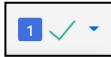
Continue to search and add additional items to the cart.



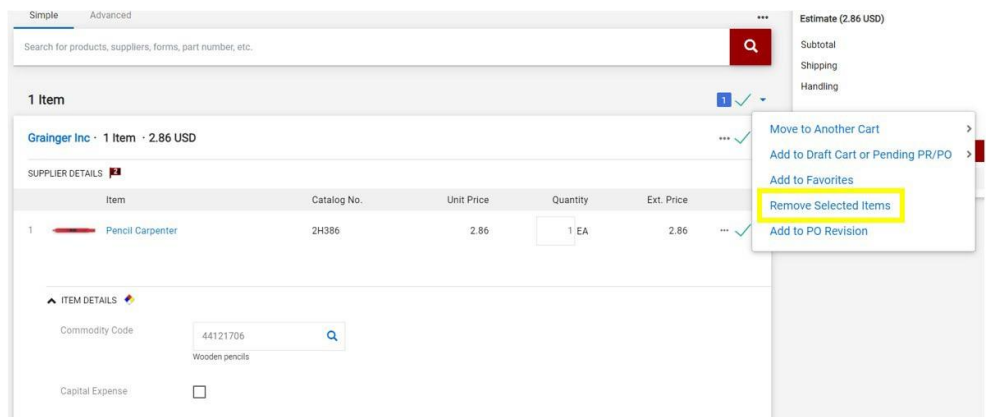
#### 4. Removing items in the cart

Remove items from your cart in several ways. Users 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.

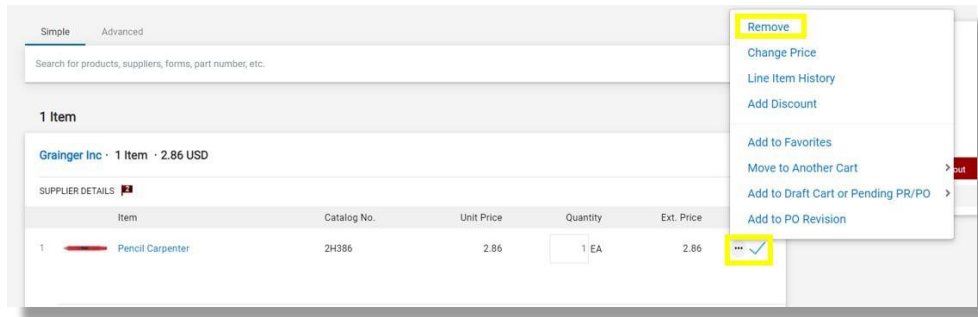


A user can access their cart from the slide out menu (Shop / My Carts and Orders / Open My Active Shopping Cart). Select the box  to the right, at the top of your cart. Selecting this box will check the box on every line.

Select the arrow next to it to activate the drop-down menu. Choose **Remove Selected Items** to delete all the lines in the cart.



A user can also remove an item by selecting the **Remove** button within the item in the cart. Click the check box on the line items and then the ellipsis (3 dots) and select **Remove**.



## 5. Updating items in the cart

Again, a user may access their cart via the “Shop” slide out menu, the cart icon in the top right of the dashboard or from the shopping homepage, scroll down until you see “My Draft Carts.” Click on the item, make the desired changes and save.

| My Draft Carts             |                       |                          |           |            |
|----------------------------|-----------------------|--------------------------|-----------|------------|
| Showing Results 1 - 5 of 5 |                       |                          |           |            |
| NUMBER                     | CART                  | CART TYPE                | DATE ↓    | TOTAL      |
| <a href="#">3526353</a>    | 2022-05-13 dlove35 01 | My Drafts                | 5/13/2022 | 39.00 USD  |
| <a href="#">3485524</a>    | 2022-03-11 dlove35 01 | My Returned Requisitions | 3/11/2022 | 487.50 USD |

## 6. Copying previous carts to a new cart


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

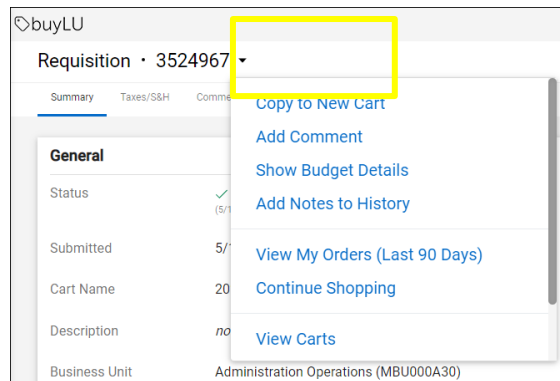


**Note: Users are unable to copy carts from Punch-Out Suppliers. Doing so will cause an error and the cart will not move forward.**

| Submitted Date: Last 90 days Quick search |                    |                  |                    |  |
|---|--------------------|------------------|--------------------|--|
| Page 1 of 2 1-20 of 39 Results            |                    |                  |                    |  |
| Requisition Number                        | Supplier           | Requisition Name | Requisition Status |  |
| <a href="#">3524967</a>                   | Dell Computer Corp | 2022-05-12 01    | Completed          |  |
| <a href="#">3520871</a>                   | Dell Computer Corp | 2022-05-05 01    | Completed          |  |
| <a href="#">3519303</a>                   | LU Encumbrance     | 2022-04-29 01    | Completed          |  |

Click on the Requisition Number.

When the Requisition opens, use the drop-down menu on the left side of the screen next to **Requisition** : and choose **Copy to New Cart**.



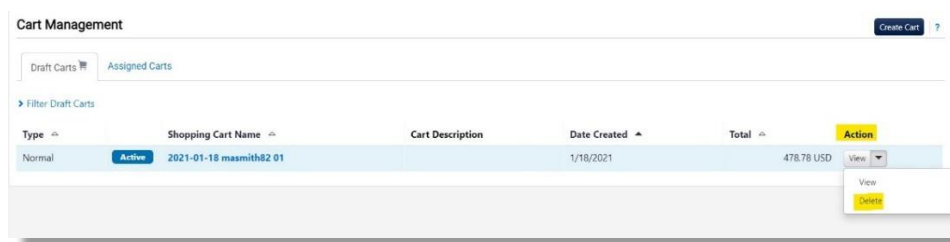
**IMPORTANT:** When shoppers/requesters use the copy function to create a new cart from a requisition generated with an **old form**, it causes issues with processing. Therefore, if a submitted Requisition contains an old form, the system will reject it and send an email stating:

**“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 Item or Form from the Forms tab.

## 7. Deleting a cart

Access the **Shop** slide out menu. Choose **My Carts and Orders**, then **View carts**. This will pull up your draft carts and assigned carts. Delete a cart by clicking the **Delete** button under **Action**.



## x. Checking Out

### a. Assigning a cart

The Shoppers for each department are required to assign their carts to Requesters for submission (Check Out). Shoppers should set the designated Requesters as profile values. This will allow them to select their Requester 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 Requester.

After finalizing the cart, click on **Assign Cart** on the upper right-hand side.

Shopping Cart • 3463042

Simple Advanced

Search for products, suppliers, forms, part number, etc.

2 Items

Grainger Inc • 2 Items • 110.32 USD

| Item                               | Catalog No. | Size/Packaging | Unit Price | Quantity | Ext. Price |
|------------------------------------|-------------|----------------|------------|----------|------------|
| 1 Paper Towel Multifold White PK16 | 6V082       | EA             | 55.16      | 2 EA     | 110.32     |

ITEM DETAILS

Commodity Code 14111703 Paper towels

Capital Expense

Details

For Diana Love

Name 2022-02-16 dlove35 01

Estimate (110.32 USD)

|              |               |
|--------------|---------------|
| Subtotal     | 110.32        |
| Shipping     | 0.00          |
| Handling     | 0.00          |
| <b>Total</b> | <b>110.32</b> |

Assign Cart Proceed To Checkout



**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 a complete FOAPAL before a cart can be submitted.

The box shown below will be displayed. Use the blue **SEARCH** button to assign the cart to a person. Find the person and click **Assign**.

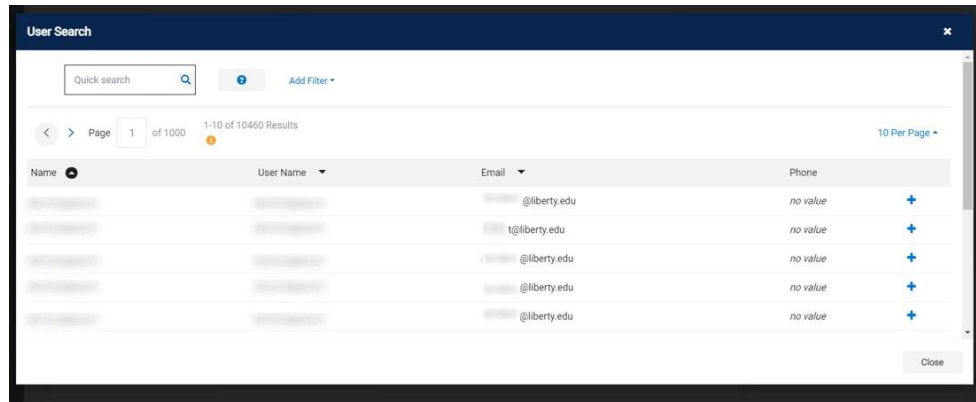
Assign Cart: User Search

Assign Cart To: no value

SEARCH

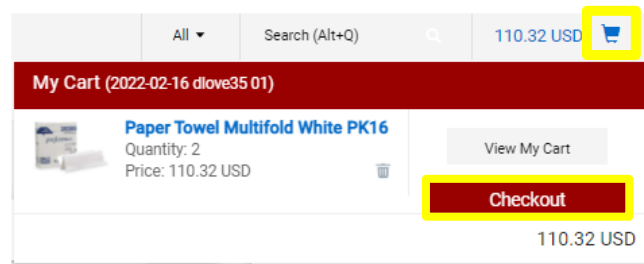
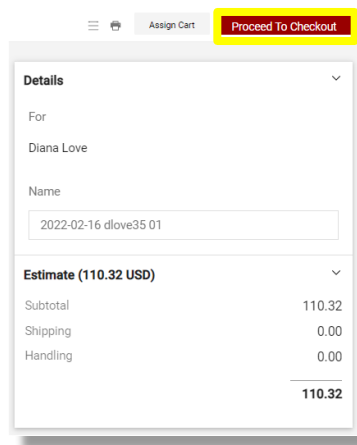
Note To Assignee:

Assign Close

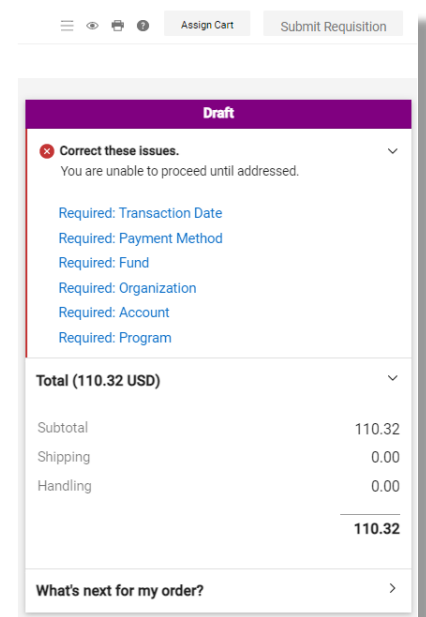


## b. Proceed to checkout

When the order is completed, it is submitted by clicking the **Proceed to Checkout** button in the upper right corner within the cart or the **Checkout** button from the cart drop-down.



In the section labeled “Draft” on the right of your screen, you will see certain items requiring attention, though all items should be reviewed for accuracy prior to submission. If you select the item, it will take you to the section of the requisition containing the item.







***When entering the FOAPAL, if you should need to change the fund or org, you must start with the index. Once the index is correct you will be able to select the correct fund and org.***

Under the FOAPAL section of the draft, you can search account codes. Click the “**Pencil**” button to the right of the FOAPAL section. Click the blue magnifier button.

The “Custom Field Search” window will appear. Enter the account value or description and hit **Filter**. It will filter the results for your selection. To add, click the blue “+” button. To clear, select **Clear All Filters**.



***When entering the FOAPAL, if you do not know what account code you are to use, you should search your account number at the line level instead of the header. At the header level you will see ALL account codes, at the line level you will only see those accounts mapped to the commodity code.***

**Custom Field Search**

Value:  livestock

| Value  | Description   |
|--------|---------------|
| 181014 | PPE-Livestock |
| 791016 | Livestock     |

**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) unless it is a medical asset which is charged to 732002. The threshold for all assets is \$2500 with the exception of computers which have a capitalization threshold of \$5000. (To find out more about asset accounts, contact your budget analyst at [budget@liberty.edu](mailto:budget@liberty.edu))

Once the “Account” number has populated, click **Save Changes**.

**Edit FOAPAL**

FOAPAL

| Chart | Index  | Fund   | Organization | Account | Program | Activity |
|-------|--------|--------|--------------|---------|---------|----------|
| U     | 1H1070 | 111101 | H1070        | 791016  | 60      | Search   |

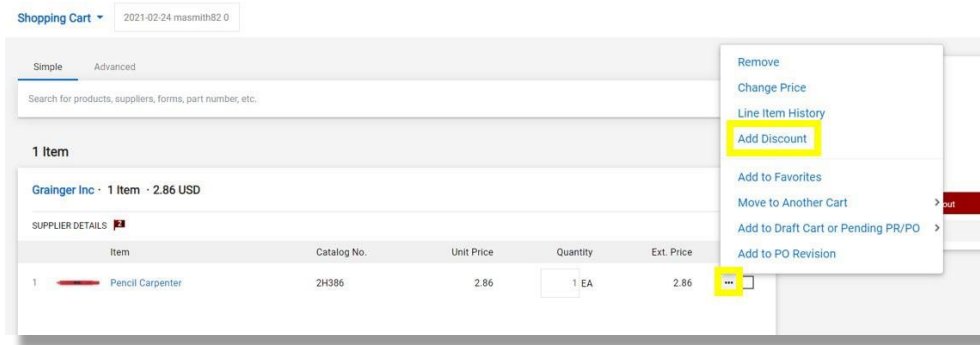
## xi. Discounts

Discounts can be applied at 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 the details.

### a. Line Level Discount

To add a discount for a line in a cart, locate the ellipsis (3 dots) on the right side of the line item. 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:

The 'Add Discount' dialog box is shown. It has a red header with the title 'Add Discount' and a close button. The form contains the following fields: 'Supplier' (Grainger Inc), 'Applies to Line(s)' (1), and 'Applied to Subtotal' (110.32 USD). Below these, there's a 'Discount' section with two radio buttons: 'Percentage' (selected) and 'Amount'. There is a text input field for the discount value followed by a '%' symbol. A 'Preview Calculations' link is located below the input field. At the bottom, there are 'Apply' and 'Close' buttons.

#### 1. Discount

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.

#### 2. Preview Calculations

Select this link to see a preview of the discount before applying it.

### 3. Apply

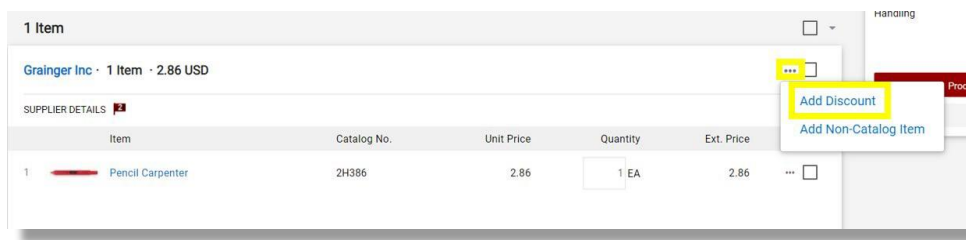
Click this button to apply the discount.



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

## b. Supplier Level Discount

To add a supplier-level discount, locate the supplier group and click the ellipsis (3 dots) in the supplier group header.



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

### 1. Discount

Click the appropriate radio button to determine if the discount will be based on a percentage or an 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.

### 2. Preview Calculations

Select this link to see a preview of the discount before applying it.

### 3. Apply


Click this button to apply the discount.

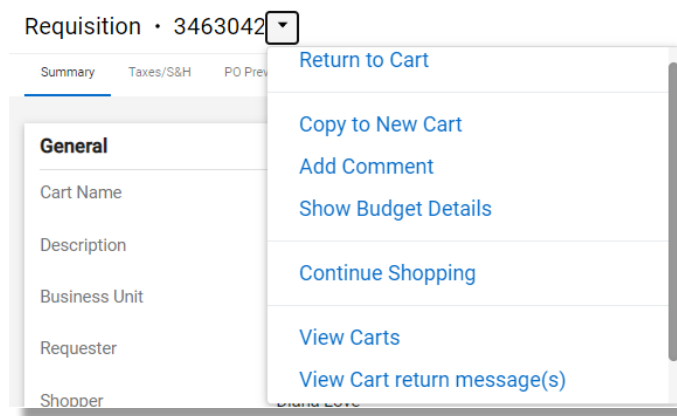
## xii. Requisition Final Review

Once the required items have been completed, your requisition can be submitted. However, best practice is to review each of the options on the summary page before submittal.

### a. Links & Tabs

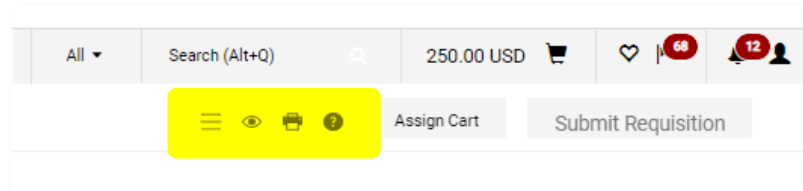
There are links in blue at the top left of the requisition number.

**Requisition** : 139816274 This link contains a drop-down menu that allows the user to copy all items to a new cart or add a comment on a requisition.



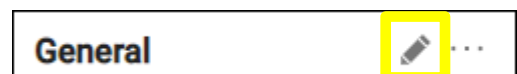
### 1. Quick Links

Allows the user to change the view, print or search help. The three lines on the left of the quick links will show or hide the workflow steps. Workflow steps show the user the approval path the requisition, purchase order and invoice follow.



There are tabs across the top of the requisition to easily access the Summary, Taxes & Shipping, PO Preview, Comments, Attachments and History.

### 2. Summary Tab



- **General**

To edit **any** section, select the pencil icon next to the section title.

Editing the General section 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 override request
- f. Enter the Transaction Date. Use today's date as the transaction date for all transactions except those that need to be completed in a future fiscal year. July 1 should be used for future year transactions. ***This field is required!***

**Edit General**

**General**

Cart Name \*

Description

Business Unit \* Administration Operations (MBU000A30)

Requester Diana Love

Shopper

Associated POs

Include justification for NSF order ☐

Reason for NSF request

Transaction Date \*  **Required**

**External Information**

Note to all Suppliers

1000 characters remaining [expand](#) [clear](#)

PO Clauses

★ Required fields [Save](#) [Close](#)

- **External Information**

This section contains external notes and attachments that are visible outside of the application (e.g., suppliers). Enter additional

information that is pertinent to the supplier to assist in processing the order. Clicking the [Add](#) link allows the user to upload files from his or her computer.

| External Information          |  |
|-------------------------------|--|
| Note to all Suppliers         | <i>no value</i>  |
| Attachments for all suppliers | <a href="#">Add</a>  |
| PO Clauses                    | <b>1</b> <a href="#">Edit</a>   <a href="#">View details</a> |

- Internal Information**

Editing this section allows the user to select a variety of custom fields if necessary and add a note to the request. This note is not visible to external entities (e.g. suppliers).

Clicking the [Add](#) link allows the user to upload files from his or her computer.

Internal Information

Add

Internal Attachments

Bank Code

Cost Receipt Flag

No Receipt Required

Multi Year Indicator

Paid on PCard

Buyer Name

Violation

Encumbrance PO Number

Alternative PO terms

Check in Advance

Contract Pending

Additional Information (As Required)

Taxable Internal Award

Bank Code

Cost Receipt Flag

No Receipt Required

Multi Year Indicator

Paid on PCard

Buyer Name

Violation

Encumbrance PO Number

Alternative PO terms

Check in Advance

Contract Pending

Additional Information (As Required)

Taxable Internal Award

Internal Note

Bank Code

Cost Receipt Flag

No Receipt Required

Multi Year Indicator

Paid on PCard

Buyer Name

Violation

Encumbrance PO Number

Alternative PO terms

Check in Advance

Contract Pending

Additional Information (As Required)

Taxable Internal Award

- Payment Information**

Editing the payment information section allows the user to add **Payment Methods** and **Payment Instructions** to the request.

If an advance payment is needed the **Prepaid or Deposit Information** should be entered here.

buyLU  
Requisition - 3463042

Summary Items/SSN PO Preview Comments

**Payment Information**

**Payment Instructions**

Payment Method \*  Required

Payment Instructions

**Prepaid/Deposit Information**

PO - Partial Paid in Advance ☐

PO - Full Paid in Advance ☐

Rush Payment (due within 24 hrs) ☐

PO - Partial Paid in Advance Amount

Pay Date (MM/DD/YYYY)

Payment Method (PP)

Payment Instructions (PP)

★ Required fields Save Close

Chart Index

U no value

2 Items

- **Shipping and Billing Addresses**

There are several options the user has when reviewing the shipping and billing summary.

- a. **Ship To**

Users can edit the shipping address. Note: Be certain that things from the warehouse are not shipping to 12<sup>th</sup> street (which is the warehouse).



## b. Delivery Options

Users can choose to expedite the order, choose how they wish to have the order shipped and request a delivery date.

## c. Bill To (Do Not Edit)

The billing address defaults to Accounts Payable and should not be edited.

## • FOAPAL

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

| FOAPAL                    |          |          |              |          |          |          |          |               |               |
|---------------------------|----------|----------|--------------|----------|----------|----------|----------|---------------|---------------|
| Chart                     | Index    | Fund     | Organization | Account  | Program  | Activity | Location | Activity Link | Location Link |
| U                         | no value | no value | no value     | no value | no value | no value | no value | no value      | no value      |
| Liberty University 7/1/09 |          | Required | Required     | Required | Required |          |          |               |               |

## • Lines

In the center of the page the user can view all the lines in the requisition. Users have the option to select a line item by checking the box to the right of the item and clicking the ellipsis (3 dots) to choose an option from the menu. Options include:

**Grainger Inc** · 2 Items · 110.32 USD

^ SUPPLIER DETAILS

Contract no value PO Number To be assigned - edit to specify

Pricing Code no value

| Item                               | Catalog No. | Size/Packaging | Unit Price | Quantity | Ext. Price |
|------------------------------------|-------------|----------------|------------|----------|------------|
| 1 Paper Towel Multifold White PK16 | 6VD82       | EA             | 55.16      | 2 EA     | 110.32     |

^ ITEM DETAILS

Manufacturer Name GEORGIA-PACIFIC Contract: no value Internal Note no value

Manufacturer Part Number 20389 Capital Expense X Internal Attachments Add

More Information URL http://www.grainger.com/Grainger... External Note no value Attachments for supplier Add

UNSPSC 14-11-17-03 NSF X

- a) Override  
(Supplier, Internal Info, Ship To, Delivery Info, Bill To, FAOPAL)
- b) Remove
- c) Line Item History
- d) Requires Sourcing
- e) Add Discount
- f) Add to Favorites
- g) Move to another Cart
- h) Add to Draft Cart or Pending PR/PO
- i) Add to PO Revision

Override

- Supplier
- Internal Information
- Ship To
- Delivery Options
- Bill To
- FOAPAL

Remove

- Line Item History
- Requires Sourcing
- Remove Requires Sourcing
- Add Discount

Add to Favorites

- Move to Another Cart
- Add to Draft Cart or Pending PR/PO
- Add to PO Revision

### 3. Taxes, Shipping and Handling Tab

Click the Taxes/S&H tab at the top of the screen. If you wish to edit taxes and shipping and handling click the pencil icon at the top right, this will open the window, “Edit Taxes/S&H for all Lines in this Group” allowing users to override the default shipping and handling charges.

Requisition : 3184094

Summary Taxes/S&H PO Preview Comments Attachments History

1 Item

Grainger Inc · 1 Item · 2.86 USD

Shipping 0.00 per line 0.00

Handling 0% 0.00

Total 2.86

| Item               | Catalog No. | Unit Price | Quantity | Ext. Price |
|--------------------|-------------|------------|----------|------------|
| 1 Pencil Carpenter | 2H386       | 2.86       | 1 EA     | 2.86       |

Shipping fixed amount 0.00

Handling 0% 0.00

#### 4. PO Preview Tab

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

#### 5. Comments Tab

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.

The screenshot shows the 'Comments' tab in a web application. At the top, there are navigation tabs: Summary, Taxes/S&H, PO Preview, Comments (selected), Attachments, and History. Below the tabs, it says 'Records found: 0'. To the right, there is a dropdown menu labeled 'Show comments for' with 'Requisition' selected and a plus icon. The main area is titled 'ADD COMMENT' with a checkmark and close icon. It contains a text input field with the placeholder 'Put your comments here' and a character count '978 characters remaining'. Below the input field are 'expand' and 'clear' links. To the right of the input field, there is a section titled 'This will add a comment to the document.' with a link 'Attach file (optional)'. Below this, there are radio buttons for 'Attachment' (selected) and 'Link/URL'. Under 'Attachment', there is a 'File Name' input field and a 'File' section with 'Choose File' and 'Upload your file' buttons. At the bottom, it says 'No comments have been added'.

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

- 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

## 6. Attachments Tab

The Attachment Overview page allows users to add internal attachments and shows a list of all the attachments for this requisition as well as a count of the total attachments on the page itself. An internal attachment can also be changed to an external attachment

## 7. History Tab

The History page reveals all the changes that have been made to the document. The data can be filtered or exported to a CSV file.

Requisition : 3175730

Summary Taxes/S&H Comments Attachments History

Start date End date Action User Requisition

mm/dd/yyyy mm/dd/yyyy

Filter Clear All Filters Export CSV

1-17 of 17 Results 20 Per Page

| Line No | Date/Time          | User   | Step(s)   | Action                                 | Field Name   | From | To | Note |
|---------|--------------------|--------|-----------|--|--------------|------|----|------|
|         | 2/15/2021 11:45 AM | System |           | Requisition approval process completed |              |      |    |      |
|         | 2/15/2021 11:45 AM | System | Create PO | PO Created                             | PO#: 3265272 |      |    |      |

## xiii. Submit the Requisition

To submit a requisition, click [Submit Requisition](#).

Submit Requisition

Assign Cart

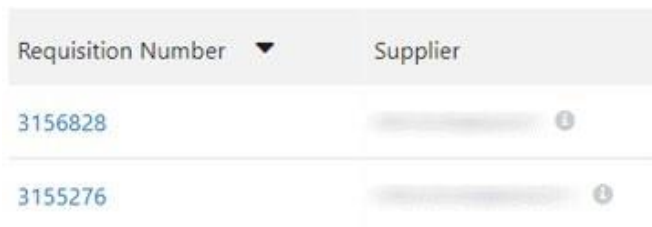
### 1. Reviewing the Cart Workflow

The workflow process begins when a cart is submitted. Think of workflow as the path your cart will follow which will vary depending on what is in the cart. For example, your cart will take varying paths if a form is being used or the funds and accounts are different, or the amount of money being spent changes. 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 need 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 \(Last 90 Days\)](#).

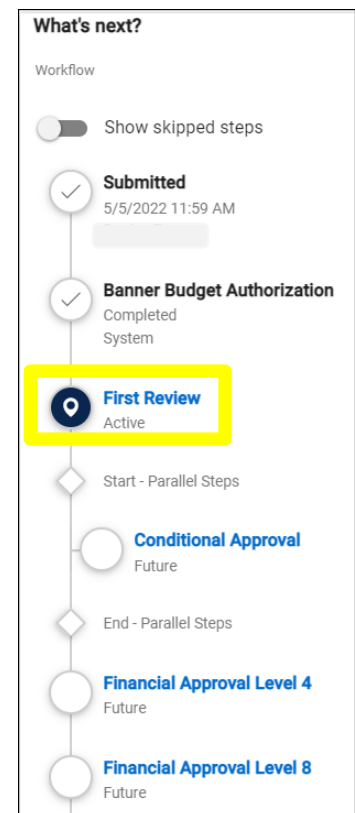
Find the Requisition that you wish to view and click on the RequisitionNumber.



On the right side of the screen, you will see the workflow steps.

You can see from the example, the first stop for this requisition is for the **Banner Budget Authorization**. The Banner Budget Authorization is automatic. If a requisition does not pass the budget check, it is returned to the Requester and a notification would be generated. The next step is the First Review. Click on “**First Review**” to see who will get notice of this requisition.

When a requisition has completed workflow successfully, a purchase order (PO) is created.



#### xiv. **Change Requests**

Once a Purchase Order is created, it becomes a binding contract with the vendor, and it should not be changed. If a modification is required, Change Requests can be submitted and will go through the same approval workflow as the original PO. Change Requests are used to increase/decrease quantity and unit price as well as adding or removing lines.

If the change causes the PO to exceed the competition threshold of \$10,000 or other signature authority thresholds, i.e. \$100,000, further justification/documentation may be required.

Though BuyLU will allow revisions & change requests for almost all items, if Banner will not allow the change, it cannot be done. Examples include:

- Transaction date
- FOAPALs
- POs with greater than 50 line items

#### a. Creating a Change Request

The Change Request is completed on the Purchase Order.



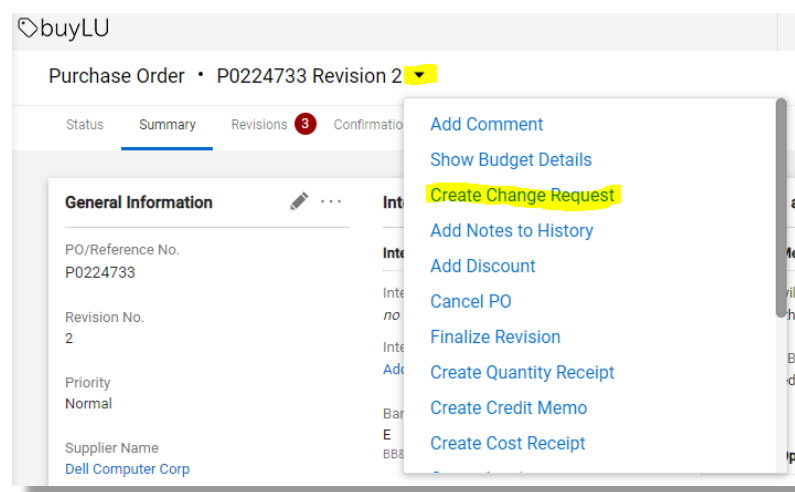
***The PO must be open in BuyLU and Banner to complete a change request.***

- Select **Create Change Request** from the drop-down menu next to the PO number at the top left of the purchase order.



***Quantity changes and line cancellations are the only changes allowed on catalog PO's. (Some catalog PO's only allow cancellations)***

***\*\*Contact your buyer for assistance\*\****



- A screen will appear where you can select users that you want to notify that a change request is being created for the PO. Selections are not required for notification.

Scroll down to the Change Request reason and make sure to include the justification for the change as well as the current PO value and the new PO value. Details are encouraged including attaching any needed documentation.

Select the **Create Change Request** button.

The left screenshot shows the 'Create Change Request' form with the following sections:

- This will create a change request for this purchase order. If you select a user they will receive an email indicating that a change request has been created for this purchase order.**
- Email notification(s) | Add recipient**
- ☐ Mary Long (Prepared by, Prepared for) <fakedebug@liberty.edu>
- User with change request permission:**
- ☐ Americus Gill (Approved) <fakedebug@liberty.edu>
- ☐ Cody Jones (Approved) <fakedebug@liberty.edu>
- ☐ Diana Love (Approved) <fakedebug@liberty.edu>
- ☐ Nickolas Shull (Approved) <fakedebug@liberty.edu>
- ☐ Rebecca Dougherty (Approved) <fakedebug@liberty.edu>
- [add email recipient...](#)
- Create Change Request Reason**
- 1000 characters remaining
- Attach file to this change request (optional):**
- Attachment Type: ☒ File ☐ Link/URL
- File Name:
- File:
- Create Change Request**

The right screenshot shows the 'Create Change Request' form with the following sections:

- add email recipient...**
- Change Request Reason**
- 1000 characters remaining
- Attach file to this change request (optional):**
- Attachment Type: ☒ File ☐ Link/URL
- File Name:
- File:
- Create Change Request**

- iii. **To change an existing line**, click on the item of the line needing adjustments which will open the form to allow changes. Edit the quantity and/or price and click save.



***Do not change commodity code and product description.***

The screenshot shows the 'ITEM DETAILS' form for Line 2. The form includes the following fields:

- Contract:** no value
- Capital Expense:** X
- Commodity Code:** 10191510 / Abamectin
- Replenish stock:** X
- NSF:** X
- Internal Note:** no value
- Internal Attachments:** [Add](#)
- External Note:** no value
- Attachments for supplier:** [Add](#)

- iv. Select the pencil on the adjusted line to add an internal note detailing the change created on the line.

2 Line 2 EA 15,000.00 1 EA ... ☐

15,000.00

ITEM DETAILS

|                 |                      |                          |          |
|-----------------|----------------------|--------------------------|----------|
| Contract:       | no value             | Internal Note            | no value |
| Capital Expense | ×                    | Internal Attachments     | Add      |
| Commodity Code  | 10191510 / Abamectin | External Note            | no value |
| Replenish stock | ×                    | Attachments for supplier | Add      |
| NSF             | ×                    |                          |          |

Edit Line 2: Item Details

2 Line 2 EA 15,000.00 1 EA 15,000.00

Contract: Select price or contract...

Capital Expense ☐

Commodity Code \* 10191510 Abamectin

Replenish stock ☐

Internal Note Added \$5,000 to price 979 characters remaining expand clear

External Note 1000 characters remaining expand clear

- v. To add a new line, click on the ellipsis (3 dots) next to the Supplier name and select **Add Non-Catalog Item** from the drop-down menu to open the form. Complete the form and click save.

Add Non-Catalog Item

Fulfillment Address PO Purchasing 1 - PO Box 643561, PO Box 643561, Pittsburgh, Pennsylvania 15264 United States

Item

| Description *                   | Catalog No. | Quantity * | Price | Packaging |
|---------------------------------|-------------|------------|-------|-----------|
| Line 3 248 characters remaining |             | 1          | 5000  | EA - Each |

Additional Details

Commodity Code 10161607

Product Flags ☐ Controlled substance

★ Required fields ⚙ Preferred

Save Save And Add Another Close

- vi. Select the pencil on the new line to add an internal note detailing the change created with the addition of the line.



**Edit Line 3: Item Details**

3 Line 3 EA 5,000.00 1 EA 5,000.00

Contract: [Select price or contract...](#)

Capital Expense ☐

Commodity Code \* 10161607 [Acalypha picta plant](#)

Replenish stock ☐

Internal Note: Needed work completed in new location  
983 characters remaining [expand](#) [clear](#)

External Note:   
1000 characters remaining [expand](#) [clear](#)

- vii. Select the pencil for the FOAPAL on the new line, complete the FOAPAL and click save.

3 Line 3 EA 5,000.00 1 EA 5,000.00

**ITEM DETAILS**

Contract: no value Internal Note: Needed work completed in new location

Capital Expense ☒ Internal Attachments [Add](#)


Commodity Code 10161607 / Acalypha picta plant External Note: no value

Replenish stock ☒ Attachments for supplier [Add](#)


NSF ☒

**FOAPAL** Values have been overridden for this line

| Chart        | Index                   | Fund                | Organization       | Account  | Program             | Activity | Location | Activity Link  | Location Link  |
|--------------|-------------------------|---------------------|--------------------|--|---------------------|----------|----------|----------------|----------------|
| U<br>Liberty | 1H1070<br>Procurement & | 111101<br>Test Fund | H1070<br>Test orgn | no value<br><input checked="" type="checkbox"/> Required | 60<br>Institutional | no value | no value | All<br>Use any | All<br>Use any |

 **FOAPALs cannot be changed on existing lines.**

- viii. To cancel a line on the PO (Non-Catalog POs Only), click on the item of the line that needs to be canceled to open the form. Change the price to zero dollars but do not change the quantity. Click save.

 **Contact your buyer to cancel a line on a catalog PO.**

2 Line 2 EA 10,000.00 1 EA 10,000.00

**ITEM DETAILS**

Contract: no value Internal Note: no value

Capital Expense ☒ Internal Attachments [Add](#)

Commodity Code 10191510 / Abamectin External Note: no value

Replenish stock ☒ Attachments for supplier [Add](#)

NSF ☒

- ix. Select the pencil on the cancelled line and add an internal note detailing why the line was cancelled and click save.



***Change Requests do NOT send to the supplier by default. If the PO changes need to be distributed to the supplier, click on the tab for External Communication and check the box to resend to Suppliers on Change Request.***

- x. When all changes have been completed, click **Submit Request**. The status of the Change Request can be seen by clicking on the tab for Change Requests.

| Status    | Number  | Owner     | Created   |
|-----------|---------|-----------|-----------|
| Completed | 3439855 | Mary Long | 1/11/2022 |
| Returned  | 3439881 | Mary Long | 1/11/2022 |

## xv. Receiving Goods and Services

Anyone who has fund/org access to the PO can do the receiving. Receiving informs Accounts Payable that you are satisfied with the good or service and it is okay to pay the invoice.



***An invoice will not be paid until the receipt has been made.***

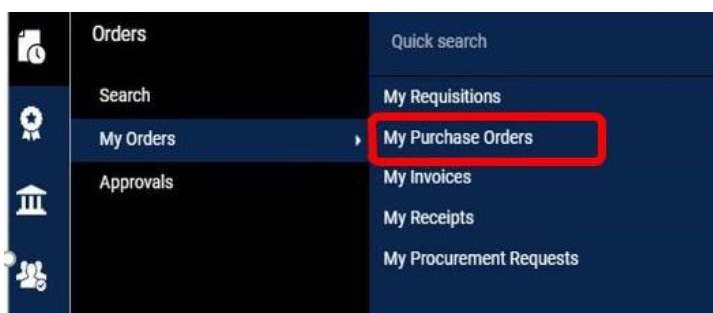
Receiving in BuyLU allows users to track the receipt of goods and services. Receipts are automatically populated with purchase order data so the user can easily reference order information allowing a minimal amount of new data for the receiver to enter.

There are two types of receipts that can be created: Quantity receipts and Cost receipts. Quantity receipts maintain a running total of goods received. Cost receipts are used when multiple invoices will need to be paid in varying dollar amounts. The PO must have a quantity of “1” for a cost receipt to be applied and your buyer will need to be notified that a cost receipt is desired.

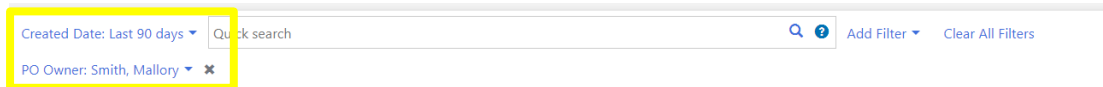
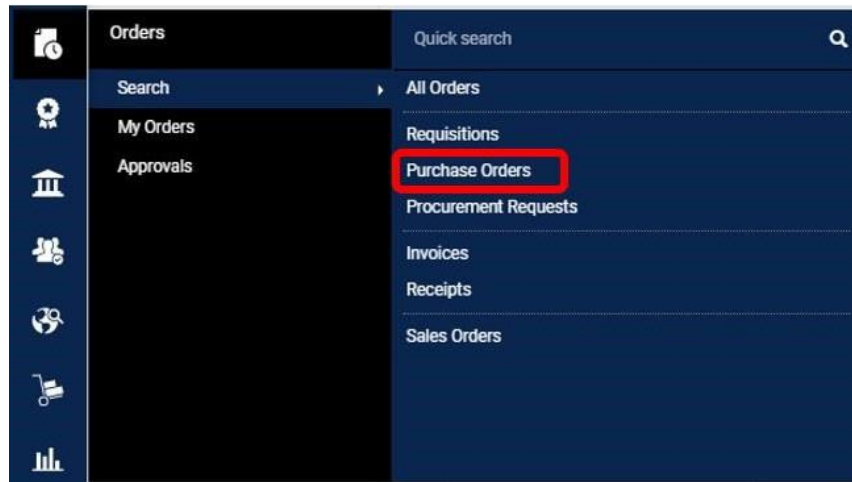
#### **a. Reviewing Receipt Status**

Document Search can be used to determine what orders have been placed and received. Any user who can view the PO can create the receipts for that PO.

To view only your PO's, select the **Orders** icon on the slide out menu, then **My Orders** on the submenu, then **Purchase orders**.



To view all of the PO's within your Fund/Org access click on **Orders, Search** and then **Purchase Orders** adjust date range as needed, then click the Search icon. All PO's will populate.



All PO's created by the user will display, notice the Matching Status column.

| PO Number | Supplier              | Created Date/Time    | PO Status | Requisition Number | PO Owner | Shipment Status | Matching Status | Total Amount |
|-----------|-----------------------|----------------------|-----------|--------------------|----------|-----------------|-----------------|--------------|
| 114559801 | Doggett, William B. O | 2/24/2021 9:27:00 AM | Completed | 140952470          |          | No Shipments    | Fully Matched   | 3,500.00 USD |

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 Matched – 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.

There are two types of receipts: Cost and Quantity.

- Cost receipts can be used when you are creating a receipt for an amount. You will have a quantity of “1” with multiple invoices coming in for different dollar amounts. Creating a PO to be cost received requires your buyer’s intervention. Please coordinate with your buyer if you want a particular PO to be set to a cost receipt. (Note: Once a quantity receipt is applied to a PO, it cannot be changed to a cost receipt)
- Quantity receipts are used when you are receiving by the quantity instead of dollars.

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

|          |                                |                       |           |         |                   |            |          |
|----------|--------------------------------|-----------------------|-----------|---------|-------------------|------------|----------|
| P0198743 | LU Warehouse                   | 12/31/2020 2:29:36 PM | Completed | 3142382 | Sent To: Supplier | No Matches | 0.00 USD |
| P0198745 | LU Maintenance and Renovations | 12/31/2020 2:29:34 PM | Completed | 3142380 | Sent To: Supplier | No Matches | 0.01 USD |



**IMPORTANT:** Best practice is to access the PO from the BuyLU tool instead of the email notification. It is essential to check the “MatchingStatus” 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 **top tabs**, select **Receipt** and click the “+” sign to the right.

Purchase Order ▾ : P0198743

|        |         |             |           |                 |          |          |            |             |         |
|--------|---------|-------------|-----------|-----------------|----------|----------|------------|-------------|---------|
| Status | Summary | Revisions 2 | Shipments | Change Requests | Receipts | Invoices | Comments 1 | Attachments | History |
|--------|---------|-------------|-----------|-----------------|----------|----------|------------|-------------|---------|

Records found: 0

There are no receipts for this PO.

Enter the applicable Header Information including:

- Date Received
- Packing Slip Number
- Receipt Address (if incorrect)
- Carrier and any notes

buyLU  
Quantity Receipt - 505215

Summary Comments Attachments History

Receipt Name: 2022-05-13 dlove35 02

Receipt No: To Be Assigned

Receipt Date: 5/13/2022

Packing Slip No:

Supplier Name: Staples Business Advantage

Received by: Diana Love (Administration Operations)

Receipt Address: Attn: Mary Long  
MSC Code Green Hall  
1971 University Blvd  
Liberty Univ Post Office  
Lynchburg, VA 24515  
United States

Carrier: Other

Tracking No:

Flexible Text Field:

Flexible Text Field 2:

Flexible Drop Down:

Attachments: Add

Notes:

1000 characters remaining

**Draft**

**Details**

Creation Date: 5/13/2022 9:19:47 AM

Source: Manual

Supplier: Staples Business Advantage

Received by: Diana Love (Administration Operations)

**Total (125.61 USD)**

Subtotal: 125.61

125.61

**Related Documents**

Purchase Order: P0233504

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 drop-down menu in the **Line Status** column.

If an item is NOT received or has been fully received, remove that line from the receipt. To remove a line from the receipt, click the trashcan icon on the right of the line and it will be removed from the receipt being created.

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

| PO - P0233504 |  |             |          |          |  |  |
|---------------|--|-------------|----------|----------|--|--|
| Line          | Item   | Catalog No. | Quantity | Status   |  |  |
| 1             | 2022 TRU RED 7" x 9" Monthly Planner, Black (TR52183-22)               | 24466860    | 1 EA     | Received |  |  |
| ITEM DETAILS  |  |             |          |          |  |  |
| 2             | Lysol Disinfectant Spray, Crisp Linen, 12.5 Oz. 12/Carton (1920074186) | 24462270    | 1 CT     | Received |  |  |
| ITEM DETAILS  |  |             |          |          |  |  |
| 3             | Berrcom Non-Contact Infrared Thermometer (JXB-178)                     | 24443010    | 1 EA     | Received |  |  |
| ITEM DETAILS  |  |             |          |          |  |  |

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

The Receipt Number displays on the screen.

● Receipt Created

**Summary**

Receipt No      YS001627

Created for the PO No(s)    P0233504

**Next Steps**

[Create Qty Receipt](#)

When a PO is fully received, it will become fully matched. A user can see the matched status on their POs from the search options on the Orders menu.

| Supplier                    | PO Number | Supplier              | Created Date/Time    | PO Status | Requisition Number | PO Owner     | Shipment Status  | Matching Status | Total Amount |
|-----------------------------|-----------|-----------------------|----------------------|-----------|--------------------|--------------|------------------|-----------------|--------------|
| Amazon.com Corporate Credit | P0233835  | Bryant's Tree Service | 5/13/2022 9:08:21 AM | Completed | 157736201          | John Walter  | Sent To Supplier | No Matches      | 2,500.00 USD |
| LU Warehouse                | P0233833  | LU IT Warehouse       | 5/13/2022 9:07:52 AM | Completed | 157735168          | Denise Evans | Accepted         | Fully Matched   | 370.00 USD   |

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.

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



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

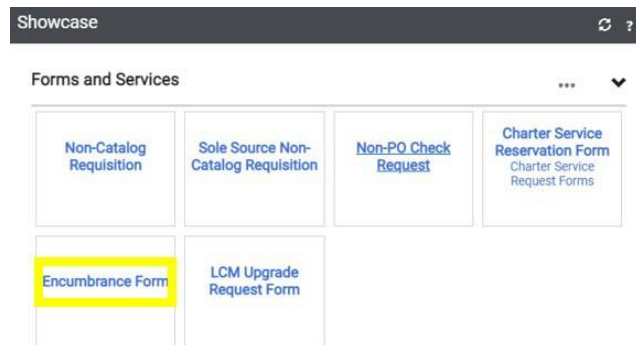
## xvi. Encumbrances

Best Practice is to set up individuals as suppliers in BuyLU instead of going through the encumbrance process if possible. This will easily link all payments to the LUID for tax purposes. Individuals needing to be paid can go through their department to contact [suppliermanagement@liberty.edu](mailto:suppliermanagement@liberty.edu) in order to register as a supplier in BuyLU.

The encumbrance process should only be used when invoices will need to be paid to a large number of different individuals (vendors) for the same service.

## a. Creating an Encumbrance

- i. On the shopping homepage, under Showcase, Forms and Services, select **Encumbrance Form**.



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

The screenshot shows the 'Encumbrance Form' interface. At the top right, there is a yellow-highlighted 'Available Actions' dropdown menu with 'Add and go to Cart' selected, and 'Go' and 'Close' buttons. The form fields include: 'Vendor' (LU Encumbrance), 'Fulfillment Address' (PO Purchasing 1: 1971 University Blvd, Lynchburg, VA 24515-0002 US), 'Instructions' (Encumbrance POs must not contain more than 1 line item per PO. Please complete a separate Encumbrance for each request.), 'Encumbrance' (Commodity Code search field), 'Total Dollars' (input field), and 'Description' (input field with 500 characters remaining). A 'Total' of 0.00 is shown at the bottom right.

- iii. Proceed to Checkout or Assign Cart

- iv. Complete the Requisition and submit. Once financial approvals have been recorded, a Purchase Order is created using LU Encumbrance as the vendor.



|  |  |   |  |
|--|--|---|--|
| <b>Purchase Order: P01179...</b><br>1943993  |  | <b>Status</b>   |  |
| Supplier: LU Encumbrance<br>Status: Completed<br>Document Total: \$00.00 USD<br><a href="#">View Related Documents</a> |  |   |  |
| <b>Status</b>  |  | <b>General Information</b>  |  |
| <b>Purchase Order</b> >  |  | PO/Reference No. <b>P0117941</b>  |  |
| <b>Revisions</b>   |  | Revision No. 0  |  |
| <b>PO Approvals</b>  |  | Supplier Name <b>LU Encumbrance</b> <a href="#">more info...</a>        |  |
|  |  | Purchase Order Date 4/24/2017   |  |
|  |  | Total 500.00  |  |
|  |  | Owner Name -  |  |
|  |  | Owner Phone +1 434-592-3044   |  |
|  |  | Owner Email @liberty.edu  |  |
|  |  | Requisition Number 1837967 <a href="#">view</a>   <a href="#">print</a> |  |

## b. Requesting Payment Against an Encumbrance

- Complete the BuyLU Encumbrance Payment Template. This is a Microsoft Excel document. This document is located [here](#).

|    | A                     | B           | C                    | D  | E                | F                | G                     | H              | I    | J     | K        |
|----|-----------------------|-------------|----------------------|--|------------------|------------------|-----------------------|----------------|------|-------|----------|
| 1  | Requestor Name        |             |                      |  |                  |                  |                       |                |      |       |          |
| 2  | Department            |             |                      |  |                  |                  |                       |                |      |       |          |
| 3  | Email Address         |             |                      |  |                  |                  |                       |                |      |       |          |
| 4  | Phone Number          |             |                      |  |                  |                  |                       |                |      |       |          |
| 5  |                       |             |                      |  |                  |                  |                       |                |      |       |          |
| 6  |                       |             |                      |  |                  |                  |                       |                |      |       |          |
| 7  | Encumbrance PO Number | Vendor Name | LU ID or W9 Attached | Description/Purpose (Including Date of Service, Hours, and Payment Rate) | Total Amount Due | Payment Due Date | Check Pick Up or Mail | Street Address | City | State | Zip Code |
| 8  |                       |             |                      |  |                  |                  |                       |                |      |       |          |
| 9  |                       |             |                      |  |                  |                  |                       |                |      |       |          |
| 10 |                       |             |                      |  |                  |                  |                       |                |      |       |          |
| 11 |                       |             |                      |  |                  |                  |                       |                |      |       |          |
| 12 |                       |             |                      |  |                  |                  |                       |                |      |       |          |
| 13 |                       |             |                      |  |                  |                  |                       |                |      |       |          |
| 14 |                       |             |                      |  |                  |                  |                       |                |      |       |          |
| 15 |                       |             |                      |  |                  |                  |                       |                |      |       |          |
| 16 |                       |             |                      |  |                  |                  |                       |                |      |       |          |
| 17 |                       |             |                      |  |                  |                  |                       |                |      |       |          |
| 18 |                       |             |                      |  |                  |                  |                       |                |      |       |          |
| 19 |                       |             |                      |  |                  |                  |                       |                |      |       |          |

- Select **Forms** from the BuyLU homepage.

[Simple](#)
[Advanced](#)

[Go to: Favorites](#)
[Forms](#)
[Quick Order](#)

Search for products, suppliers, forms, part number, etc.

iii. Select **Encumbrance Payment Request Form**

Change Order Request

Encumbrance Form from LU Encumbrance

**Encumbrance Payment Request Form from LU Encumbrance**

iv. 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.***

Encumbrance Payment Request Form Available Actions: Add and go to Cart Go

**Vendor** ?

Vendor LU Encumbrance

Fulfillment Address PO Purchasing 1:  
1971 University Blvd  
Lynchburg, VA 24515-0002 US

**Encumbrance** ?

PO Encumbrance Number

v. Select Add and go to Cart. Then select **Go**.

Encumbrance Payment Request Form Available Actions: Add and go to Cart Go Close

**Form** History ?

**Vendor** ?

Vendor LU Encumbrance

Fulfillment Address PO Purchasing 1:  
1971 University Blvd  
Lynchburg, VA 24515-0002 US

**Encumbrance** ?

PO Encumbrance Number P0123177

Please use the same commodity code provided on the original Encumbrance PO.

Commodity Code 91111901 search...

The Dollar amount should be the total on the attached spreadsheet.

Total Dollars 827.32

Description Pay event daycare workers  
475 characters remaining expand | clear

Please attach the required AP spreadsheet and any W-9's for New Suppliers.

**Internal Attachments**

Add Attachments

BuyLU Encumbrance... Remove

Total 827.32

- vi. Select **Proceed to Checkout**.

The screenshot shows a web interface for managing an encumbrance. At the top, there's a field to 'Name this cart' with the value '2017-10-11'. To the right, it says 'estimated tax, shipping & handling: \$00 USD' and has two buttons: 'Proceed to Checkout' and 'Assign Cart'. Below this, there's a section 'Have you made changes?' with buttons for 'Update', 'Empty Cart', and 'Create New Cart'. A dropdown menu shows 'Perform an action on (0 items selected)' with a 'Select All' option. The main section is titled 'LU Encumbrance' and contains a table with the following data:

| Product Description  | Unit Price                   | Quantity | Total             |
|--|------------------------------|----------|-------------------|
| <b>Encumbrance Payment Request Form</b> <a href="#">open form...</a> | 827.32 USD                   | 1        | 827.32 USD        |
| Commodity Code: 91111901 <a href="#">P</a>                           | <a href="#">Update</a>       | Shipping | 0.00 USD          |
| Infant or child daycare services                                     | <a href="#">More Actions</a> | Handling | 0.00 USD          |
| Capital Expense  |                              |          |                   |
| <b>Supplier subtotal</b>   |                              |          | <b>827.32 USD</b> |

- vii. Complete missing information on requisition. Enter the same FOAPAL information as was entered on the Encumbrance, then select **Submit Requisition**.
- viii. Once approved the Encumbrance Payment Request will be processed by Accounts Payable.

### c. Change Encumbrances

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

## xvii. Non-PO Check Requests

Non-PO Check Requests are used to request payment for vendor invoices if a purchase order was not obtained. This should be a rare occurrence for special circumstances only since it is a **violation of policy** in most cases. In occasions where it is necessary, a separate Non-PO Check Request should be submitted for each invoice requiring payment.

### a. Creating a Non-PO Check Request

- i. Under Showcase, Forms, and Services, select **Non-PO Check Request**.

Showcase

Forms and Services

Non-Catalog Requisition

Sole Source Non-Catalog Requisition

Non-PO Check Request

Charter Service Reservation Form  
Charter Service Request Forms

Encumbrance Form

LCM Upgrade Request Form

ii. Complete all the fields in the form per the instructions.

Non-PO Check Request

Instructions:

- A separate form will need to be filled out for each line on the invoice.
- Required fields are in **bold**.
- Use of a Non-PO Check Requests is generally a Policy Violation

iii. Please enter the description of the product in the product description section. (Note: this field wraps so please do not use the enter key)

Non-PO Check Request Information

New Supplier information (if applicable)

If your supplier is not listed in the system, select "Supplier Not Listed" as the supplier name and fill out the supplier information in the section to the right. **An attached W9 is required for all new Suppliers.**

Enter Supplier

or

Supplier Search

PO will not be sent to the Vendor

Fill out all fields in this section if you need to order from a new supplier that does not currently exist in the system.

Supplier Name

Supplier Address

Supplier Contact Name

Supplier Contact Email

Supplier Contact Phone #

Product Information

Product Description

Quantity

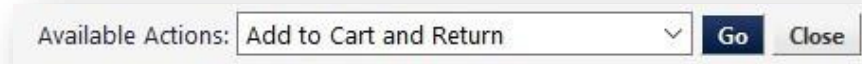
Single Unit Price

Commodity Code

This is a policy violation: Provide an explanation why a PO was not obtained.

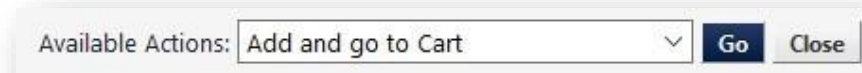
Internal Attachments

- iv. Each line of the invoice is submitted individually using **Add to Cart and Return** functionality.



Available Actions: Add to Cart and Return ▼ Go Close

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















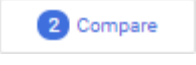
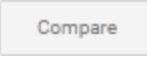











Available Actions: Add and go to Cart ▼ Go Close

- vi. Check out as usual.

## xviii. Icons

You will see these icons in the new shopping pages:

-  Click to switch between the classic and new shopping experiences
-  Click to display additional options available for items in a panel or page
-  Click to edit information in a panel
-  Collapse section
-  or  Expand section
-  Click to add an item to Favorites
-  Item is a user's personal Favorite
-  Item is a shared Favorite
-  Shared cart
-  The recommended item has been added to a requisition in the last 30 days
- **COMPARE** or  Click to add an item to the Compare list
- **COMPARE**  or  Item has been added to the Compare list
-  Click to generate a comparison
-  No items have been selected for comparison
-  Show shopping search results in a grid view
-  Show shopping search results in a list view
-  Choose which item details to display on tiles in the grid view
-  Item requires sourcing
-  Item is associated with a contract
-   Show or hide sidebar
-  View or hide header and line item details, line items only, or accounting codes only
-  Click to view help information