Logging In
• Using the Purchasing homepage click on the USU EZBUY link.
• On the left side of the USU EZBUY homepage, review Bulletin Board information for new announcements or training materials.

Reviewing Your Profile
1. Click the profile link located in the left corner of the page.
2. Click the User Settings tab. Review/edit Email Preferences.
3. Click the Purchasing tab. Review/edit Shipping Addresses and Index defaults. Some fields are view only and can only be updated from Banner.
4. Click the Save button.

Reviewing Action Items
• On the left side of the USU EZBUY homepage, review the Action Items (worklist) for updates regarding requisitions, purchase orders or invoices.

Shopping
• If you know the vendor, go directly to the vendor’s punch-out site to search and shop.
• Use USU Contracts to search for preferred suppliers at University-specific pricing.
• Use USU Forms to create shopping carts for non-catalog items, Standing Purchase Orders and other pre-configured forms.
• Use Advanced Search options to enter specific criteria including Product Description, Part Number, Supplier and/or Manufacturer Name and Key Word search.
• Use Go To options to search from Favorites, move to the Forms Page, create a Non-Catalog Form order or create a Quick Order.
• Use Browse options to search for a Supplier or products by Category.

Creating Shopping Carts
Give shopping cart a unique name
1. While searching, add items to your shopping cart from the search results via the Add to Cart button.
2. To access the shopping cart after adding a line item, select the link or the icon (upper right corner of screen).
3. Click the USU EZBUY logo or homeshop tab to continue shopping.

Using USU Forms
1. From the USU Forms section, select the appropriate form.
2. Enter all required information (indicated in bold).
3. Select Add and go to Cart from the drop down menu.
4. Click the Go button to return to the shopping cart.
5. Follow Assigning Shopping Carts instructions.

Punch-out Shopping
Punch-out connects to the supplier’s website, branded for and using University contract pricing. A typical punch-out site retains the look and feel of the public website, however, the checkout will result in the products being returned to the USU EZBUY site and added to the active shopping cart. Follow the supplier’s directions for submitting the items back to USU EZBUY as each suppliers site may differ. Product pricing and availability may vary between the public and University websites.
1. Click the supplier’s icon. Select punch-out to begin the punch-out session.
2. Search in the supplier’s catalog for items and add to supplier shopping cart.
3. Confirm order in supplier’s site in order to return item(s) to USU EZBUY shopping cart.
4. Follow Assigning Shopping Carts instructions.

Creating Favorites
Add routinely ordered items to a favorite’s folder for quick re-ordering.
1. Search for items using Punch-Out catalogs or Forms
2. Add items to cart. Select Add to Favorites; edit the Item Nickname (if needed). The correct product name will display on the requisition and purchase order to the supplier
3. Select the Destination Folder or button and click Submit. A message will appear noting the product has been added to the folder.
4. Click the Close button.

Adding Notes and Attachments
• Internal Notes and Attachments and External Notes and Attachments may be added to the requisition prior to submission.
• All attached documentation will remain with the requisition and purchase order indefinitely.
• Documentation is visible to all approvers of the requisition.
• Some suppliers have the ability to accept external notes and attachments with a purchase order. These are typically suppliers who are receiving the purchase order via fax or email.
• Few electronically integrated suppliers have the ability to accept notes and attachments. Notifications will indicate if notes and attachments are accepted.
1. Click carts on the navigation bar to open the active cart.
2. Click the requisition number to open the requisition.
3. Click Requisition Summary tab.
4. Click the add attachment... link. Add file or URL. Click the Save button.
Updating and Editing Shopping Cart Items
1. After adding items to your shopping cart, select the appropriate line by checking line checkbox (✓).
2. Add to favorites, remove items, or move items to a different cart using the [Perform an action on (1 items selected)...] list.

Splitting Distributions Across Indexes
Shoppers can assign carts without completing this information
1. Click carts on the navigation bar to open the active cart.
2. Click the Proceed to Checkout button.
3. On the Summary tab, scroll down to the Accounting Codes section.
4. Click the line edit button. Click the Add split link.
5. Select % of Qty (or other) from drop down menu button. Enter the split % amount.
6. Enter the Index and Account. Click the Save button.
7. This may also be done by line item.

Adding Indexes, Shipping etc.
Shoppers can assign shopping carts without completing this information.
1. Click carts on the navigation bar to open the active cart.
2. Click the Add Index/Shipping/etc. button. Missing information, such as Shipping Address, Indexes and Accounts will appear as an error at the top of the page.
3. Enter Shipping, Indexes and Accounts as needed. Click the Save button.
4. Review the requisition for accuracy and compliance. Click the Submit into Workflow button.

Assigning Shopping Carts
1. Click carts on the navigation bar to open the active cart.
2. Click the Assign Cart button. Select a requester and click the Assign button.
3. USU EZBUY sends an email notification of the assigned shopping cart to the requester.

Unassigning Shopping Carts
Assigned requisitions can be unassigned if you need to make changes to the shopping cart or if you need to change the requester.
1. Click carts ⇔ draft carts on the navigation bar.
2. Go to My Drafts Assigned to Others section and locate the requisition.
3. Click the Unassign button. The cart will be returned to your Draft Carts list.

Withdrawing Requisitions
Pending requisitions can be withdrawn from approval workflow.
1. Click history/reports on the navigation bar.
2. Click requisition history or my requisitions tab. Click the requisition number.
3. Click PR Approvals tab to view the requisition’s status in approval workflow.
4. Select Withdraw Entire Requisition in the Available Actions drop-down menu.
5. Click the Go button. Enter the reason for withdrawal.
6. Click the Withdraw Entire Requisition button.

Viewing Approvals
You can check the approval status of a requisition on the PR Approvals tab of the requisition.
1. Click history/reports on the navigation bar.
2. Click the my requisitions or requisition history tab.
3. Click the requisition number. Click the PR Approvals tab to view the approval status.
4. Click the view approvers link to view the responsible approvers.

Creating and Distributing Purchase Orders
• Upon completion of the approval process, the Purchase Order Number is generated and the purchase order is automatically distributed to the supplier via the supplier’s preferred method.
• Some forms will not dispatch an order to the supplier, such as the After the Fact and Payment Voucher forms.
• Suppliers are provided with the requester’s contact information, as entered in profile, and will contact the requester directly with questions or concerns.

Receiving
Some purchase orders will require receipt to indicate invoice payment approval. An email notification is sent when a receipt is necessary.
1. Locate the purchase order from my purchase order or PO history tabs.
2. Click the PO number. Select Create Qty Receipt. Click the Go button.
3. Enter a unique Receipt Name (if needed).
4. Enter the Packing Slip No. and attach a scan of the packing slip (if needed).
5. Enter the received Quantity. For Standing Purchase Orders the Quantity field represents the dollar value or cost of the items or services being received.
6. Click the Save button. Click the Close button.

History
All requisitions and purchase orders are permanently stored within USU EZBUY.
1. Select history/reports on the navigation bar and select the appropriate tab.
2. Click the document number to view document summary, detail, and approval history.
3. To view payment information, go to the invoice Summary tab and view Pay Status.
Assigning and Ending Substitute Requesters
Carts already assigned to you will need to be completed or assigned to someone else.
1. Click carts ⇒ draft carts on the navigation bar.
2. Click on the Assign Substitute link and search for substitute. Select the appropriate user by clicking the radio button to the left of the user's name.
3. Click the Choose Selected User button.
4. Click the End Substitute link to end the substitution.

Consolidating Shopping Carts
When a requester consolidates shopping carts (from a shopper), the shopper loses visibility of the original shopping carts and receiving capabilities.
1. Click carts ⇒ draft carts on the navigation bar
2. Click on the name of a shopping cart (you want to combine) to make it your active cart.
3. Select the appropriate line(s) by checking line checkbox (☑️) or Select All ☐️.
4. Select Move to Another Cart from the dropdown menu.
5. Select Move to new cart. Click the Move button then click the Close button.
6. Repeat steps 1 through 4 and select the appropriate draft cart from the dropdown menu.