UNIVERSITY OF NOTRE DAME

Online Requesting and Receiving

buyND™

Training Manual

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709 Grace Hall
Notre Dame, IN 46556

Help Desk: 574-631-4289
Email: buy@nd.edu
Web: https://buy.nd.edu/

Introduction

1. What benefits can you expect from buyND?
    a) Savings: Online catalogs with negotiated pricing
    b) Convenience: A paperless requisition process, accessible anywhere and anytime
    c) Speed: Automated approvals and electronic links to suppliers
    d) Training classes, online assistance, and a live help desk

2. Three types of Shopping:
    a) **Punchout**- The vendor has the technical capabilities of allowing a connection to their online catalog.
    b) **Hosted catalogs**- The vendor supplies us with their product information, including product description, price, etc.
    c) **Non-catalog**- Only the name and address of the vendors are available in buyND. When using a non-catalog vendor, you will need to fill in the product description, price, etc.

3. Three Simple Steps to Success:

4. Key Terms:
    a) **Requisition**- An online requisition is an electronic document, which can be originated by the requestor, and then using the University's workflow rules, will be submitted to subsequent levels until it is finalized or approved and converted to a purchase order.
    b) **Purchase order**- Purchase orders allow you to clearly and explicitly communicate your intentions to suppliers by indicating types, quantities, and agreed prices for products or service. Purchase orders also help manage incoming orders and pending orders.

5. Every order you submit in buyND will have two numbers, a requisition number and a purchase order number.

Logging In

1. To log into buyND:
    a) Launch a web browser
    b) Visit either:
        i. http://buy.nd.edu
        ii. http://inside.nd.edu
            1. Use the buyND quick app on the Home or Administrative tabs
    c) Log in using your net ID and password
    d) Review any announcements on the buyND Bulletin Board

Creating a Profile

1. Your **profile** only needs to be set up one time unless your information changes. Changes for specific orders can be made at any time of creating a requisition.
2. Your user profile allows you to:
    a) Enter multiple **Ship To** codes with nicknames
    b) Select one of the **Ship To** codes to be the **default** code
    c) Enter a **contact name**
    d) Enter **room number** and **department** name
    e) Set up **default FOAPAL** information
    f) Set up information for any additional FOAPAL codes that you use so that they can be accessed from a pull down menu.
    g) Set up **Code Favorites** with nicknames

Modifying Ship To Addresses

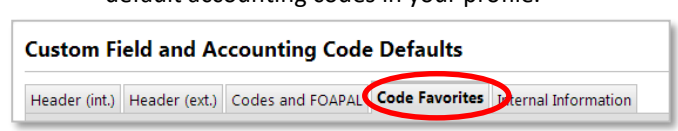
1. When modifying the contact information of a Ship To address, remember the following guidelines:
    a) Always enter a contact name (your user name is the default). This is important because it will appear on the shipping label.

FOAPAL and Commodity Codes

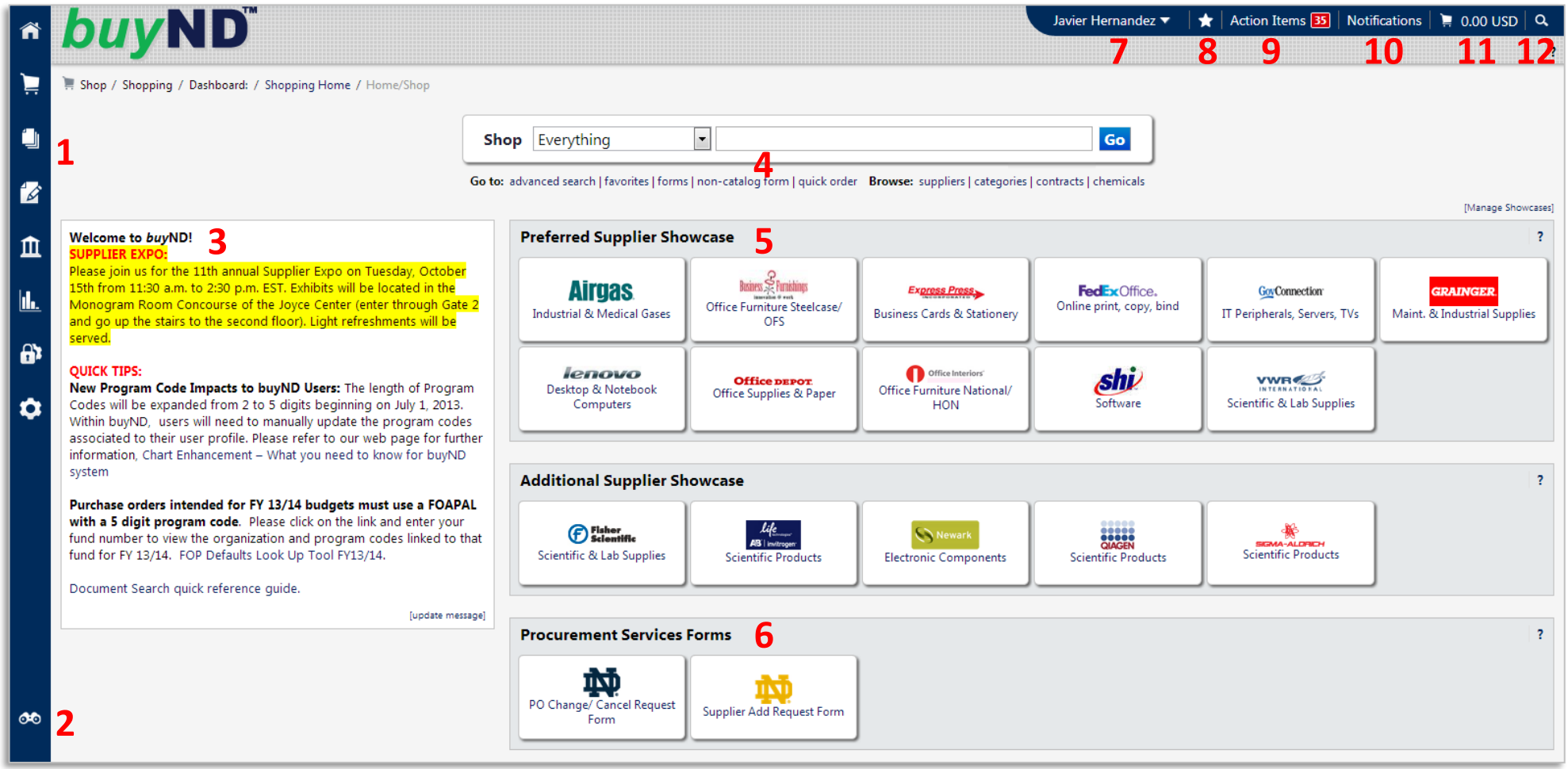
1. See your **Budget Administrator** for your **approved FOAPAL** list. Remember that not all departments require Activity and Location values in the FOAPAL code set up.
2. buyND allows you to use drop-down menus to choose appropriate FOAPAL codes for an order. Through the profile set up process, you can choose your approved FOAPALs from a larger system list and add them to your drop-down menus to make requisition creation quick and easy.
3. **Commodity codes** can be added when completing the requisition. **Grant Review** information will be provided by your Budget Administrator. If you will not be charging to a grant, please choose **No Grant Review** in your profile

Code Favorites

1. Use **Code Favorites** for quick access to accounting code combinations saved to your profile during checkout.
    a) Expand **Default User Settings** and click on **Custom Field and Accounting Code Defaults** in your profile.
    b) Click the **Code Favorites** tab.
    c) Click the **Add** button to enter 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.



Understanding the Home Screen

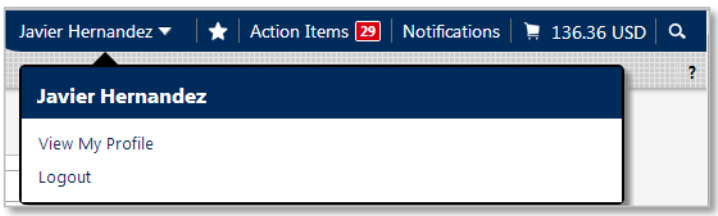


1. **Side Navigation Bar**- a clean, slide-out side menu that displays the available menu options.
2. **Menu Search**- a keyword search that returns a list of pages containing that keyword.
3. **Bulletin Board**- posts of important Procurement Services information and news.
4. **Non-Catalog Form**- non-catalog refers to purchases where hosted or punchout catalogs are not available. Use this form to enter all information regarding an order.
5. **Preferred Supplier Showcase**- links to punchouts and websites of preferred suppliers.
6. **Procurement Services Forms**- the PO Change/Cancel Request Form and the Supplier add Request Form.
7. **Profile**- contains key information about a user, including contact information, ship-to addresses, FOAPALs, etc.
8. **Bookmarks**- configure bookmarks for quick access to commonly used pages.
9. **Action Items**- items that require some sort of action, such as requisition approval.
10. **Notifications**- certain action items, such as submitted requisition or approvals will trigger notifications.
11. **Cart Preview**- allows you to get a quick view of your active shopping cart.
12. **Quick Search**- gives you access to a variety of searches, such as POs, requisitions, and receipts.

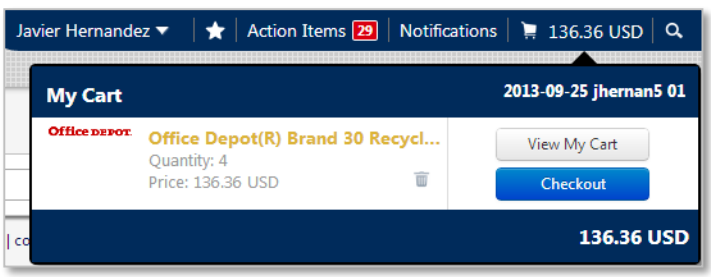
Navigation

1. The **Home** menu is the first screen after login. You will see the **Preferred Supplier Showcase** as well as other punchout suppliers.

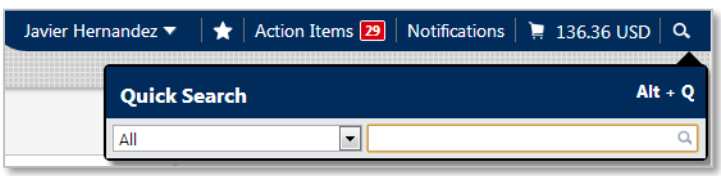
2. As you access other areas, the **side navigation bar** and the **top banner** will remain in place. **Action Items** and **Notifications** are available in the top banner. If you have pending action items or notifications, a number indicating the number of pending items will display in red. Click on the drop-down text to access the list.
3. The **user profile** contains your information, including contact information, permissions, ship-to and bill-to addresses, FOAPALs, etc. To get to your profile, click the drop-down to the right of your name.



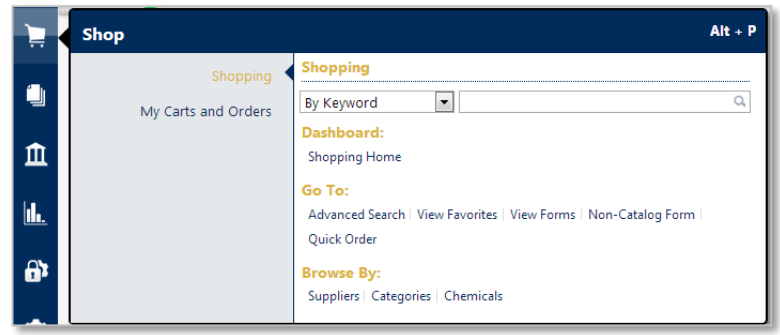
4. **Cart Preview** allows you to get a quick view of your active shopping cart. From this preview, you can review the item, delete an item, access the active cart, or go to **Checkout**.



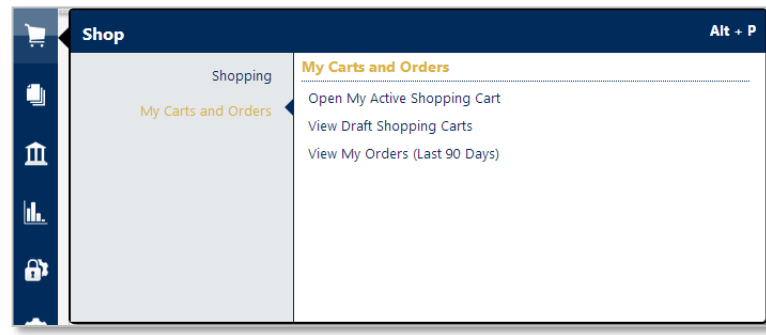
5. The **Quick Search** feature gives you access to a variety of searches, such as POs, requisitions, user profile, etc. You select the search type from the drop-down menu or use the **All** option for a complete search. Type in the PO, requisition, or receipt number, and the function will bring back results for that number. Click on the search result to travel directly to that document.



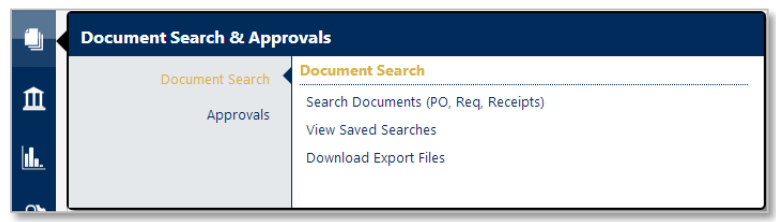
6. Most areas will be accessible from the left side navigation bar. When you roll over the main menu icons, slide-out sub-menus will appear.
7. The **Shop** menu contains menu options related to shopping tasks. From the **Shopping** sub-menu, you can search by keyword or catalog number. You can also access Favorites, Forms, and the Non-Catalog Form.



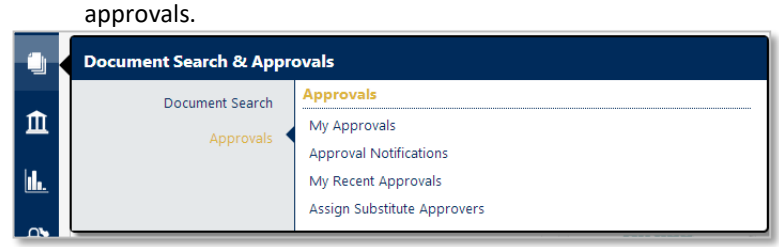
8. The **My Carts and Orders** sub-menu contains your active shopping cart, your draft shopping carts, and your most recent orders.



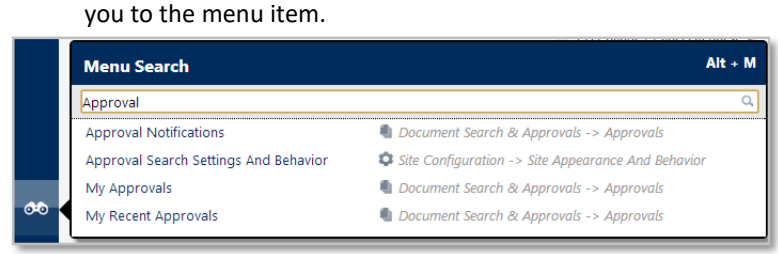
9. The **Document Search and Approvals** menu contains the **Document Search** sub-menu, which allows you to search POs, Requisitions, and Receipts, view your saved searches, or download export files.



10. The **Approvals** sub-menu lists all tasks associated with approvals, including your approvals, notifications, and recent approvals.

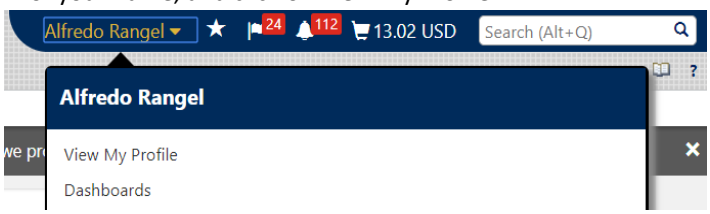


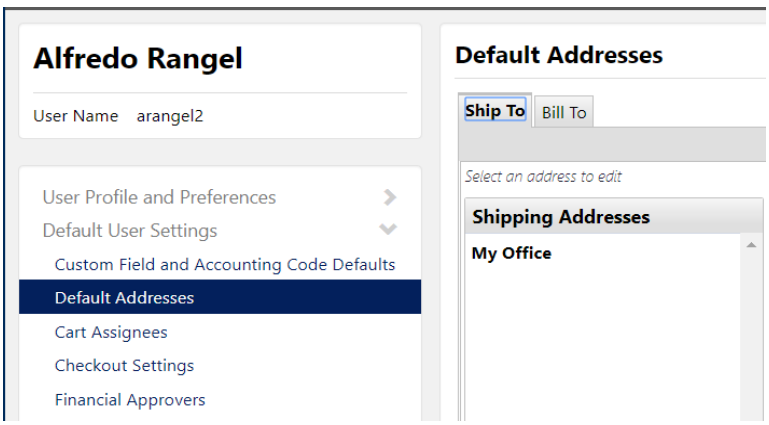
11. If you are unsure of the location of a specific menu, you can use the **Menu Search** feature. **Menu Search** returns a list of pages containing that keyword. In addition to the menu option link, the search also displays the correct path to lead you to the menu item.



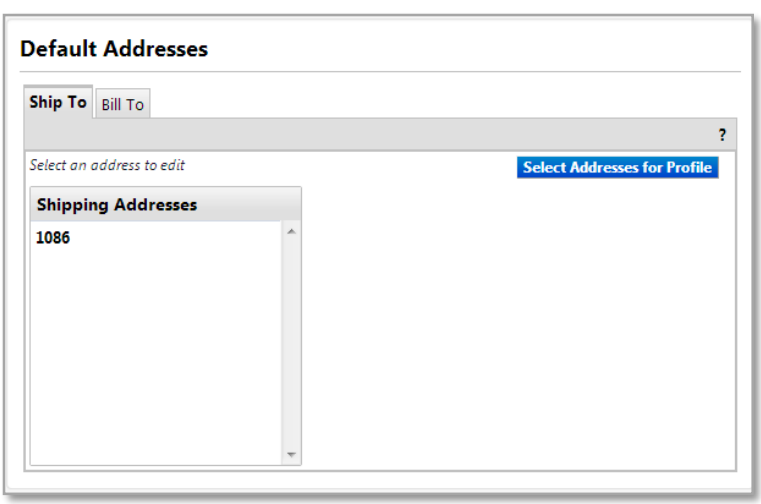
Setting Up Your Profile

1. To get to your profile, click the drop-down arrow to the right of your name, and click on View My Profile.

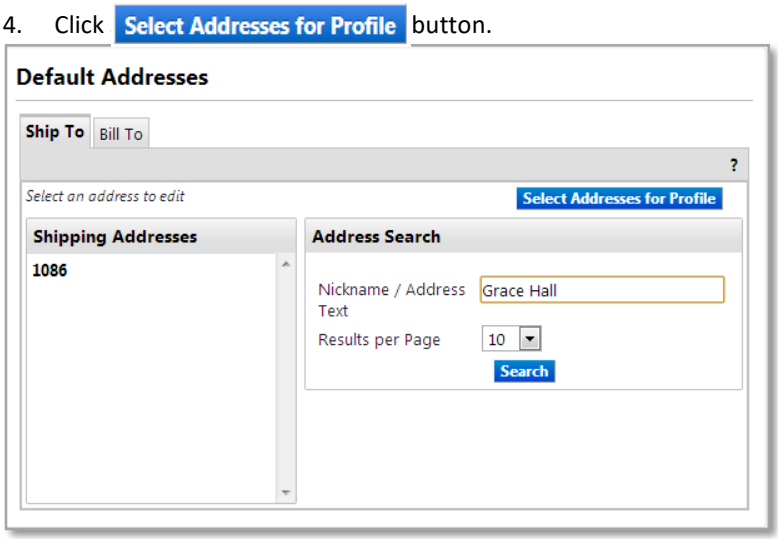




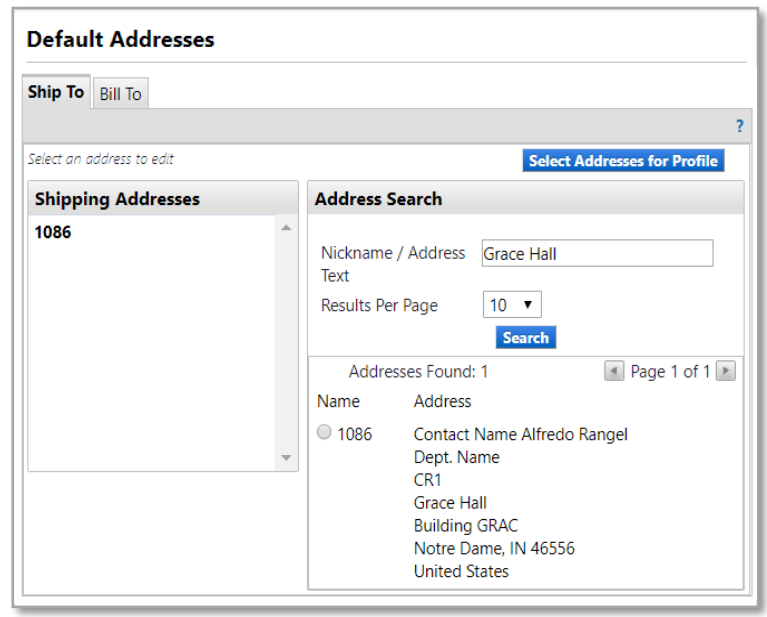
2. To add a Ship To Address to your list, click on Default Addresses.



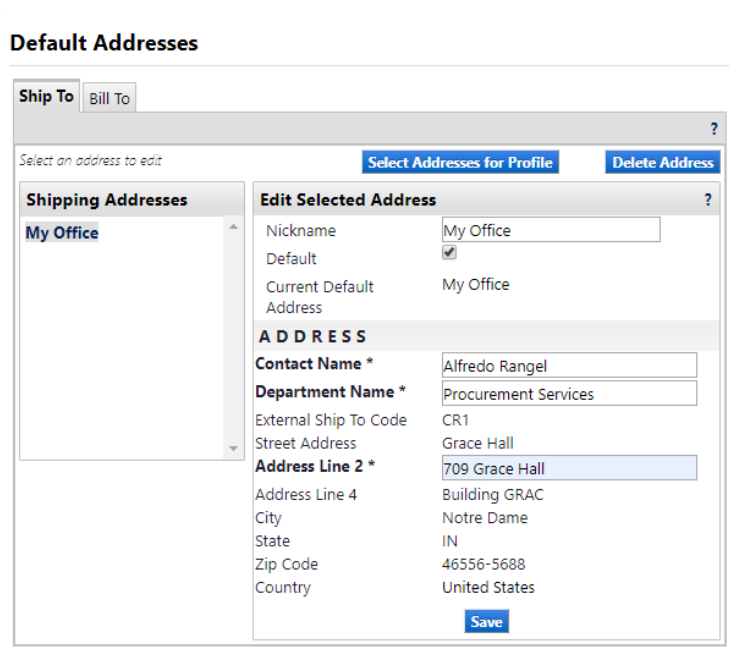
3. Make sure the Ship To tab is selected. You will not need to edit the Bill to Address.
4. Click **Select Addresses for Profile** button.



5. Enter your building name in the Nickname/Address text field. A list of search results will appear, which will show all of the Ship To addresses presently set up in the system.



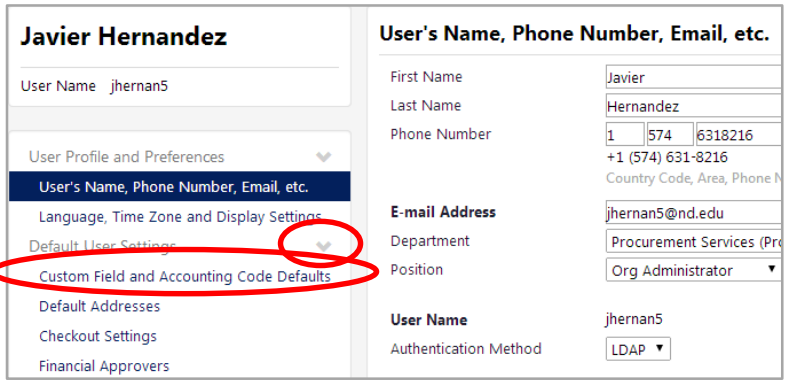
6. Select the address of your choice by clicking on the radio button left of the address. Notice the four-digit code for the address now appears in the Nickname field.
7. To replace it with a nickname of your choice, type a recognizable nickname for your new address.



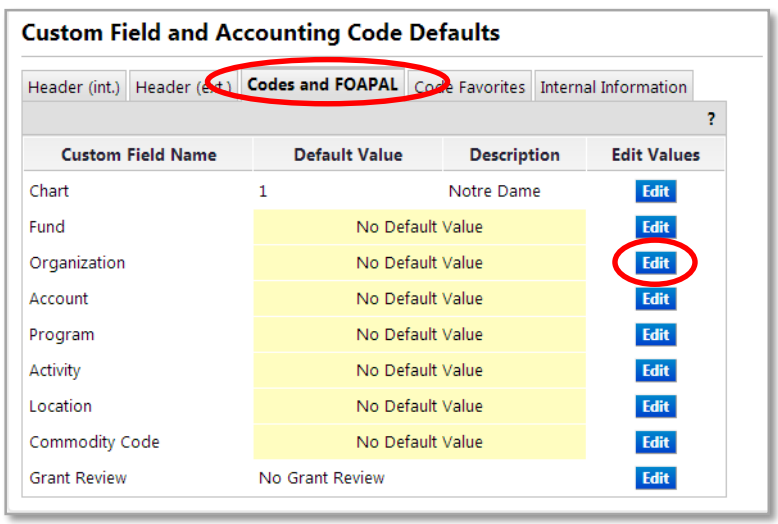
8. Put a check in the Default checkbox. This will make this address the default in the Shipping Addresses list
9. In the Dept. Name field, enter your department name.
10. In the Address Line 2 field, enter your room number and building name (e.g. 709 Grace Hall), then click save.

Entering Default FOAPAL Codes

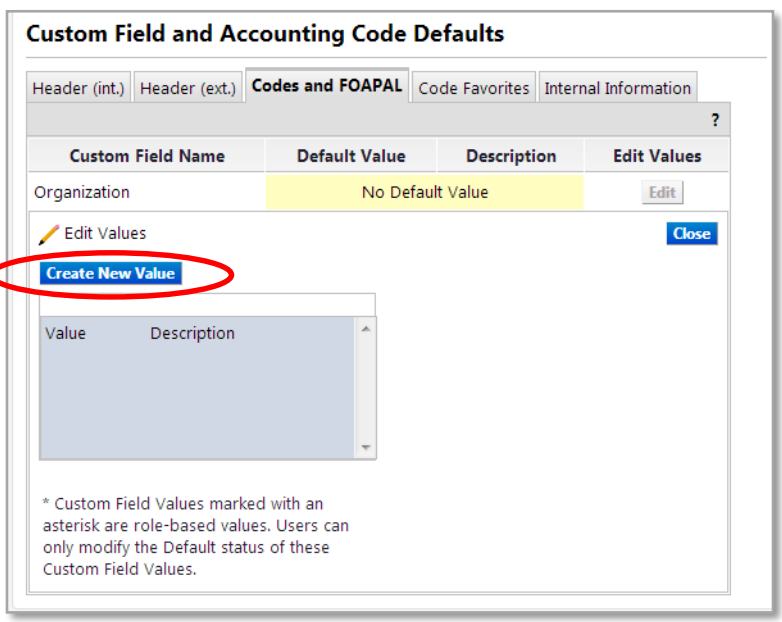
1. From your **profile**, expand **Default User Settings** and click on **Custom Field and Accounting Code Defaults**.



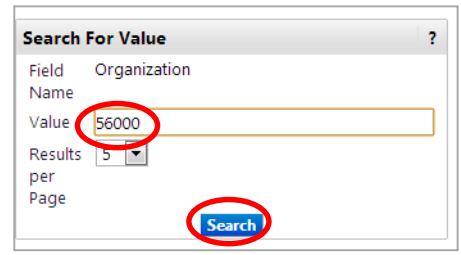
2. Click on the **Codes and FOAPALs** tab. You will need to add your codes and set each with a default so that they populate in your requisitions automatically.



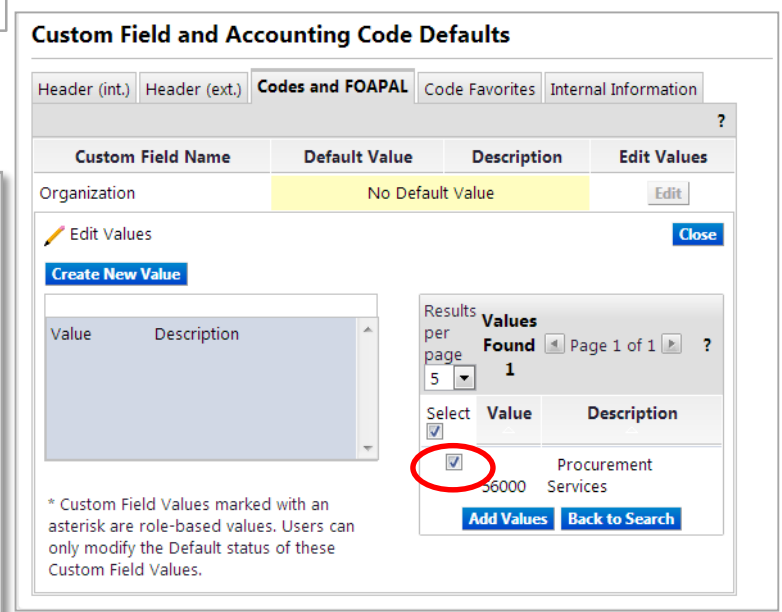
3. To add your **Fund**, **Organization**, **Account**, and **Program** codes, click **Edit** at the end of each line. For example purposes, we will be adding the **Organization** number.
4. Click **Create New Value.**



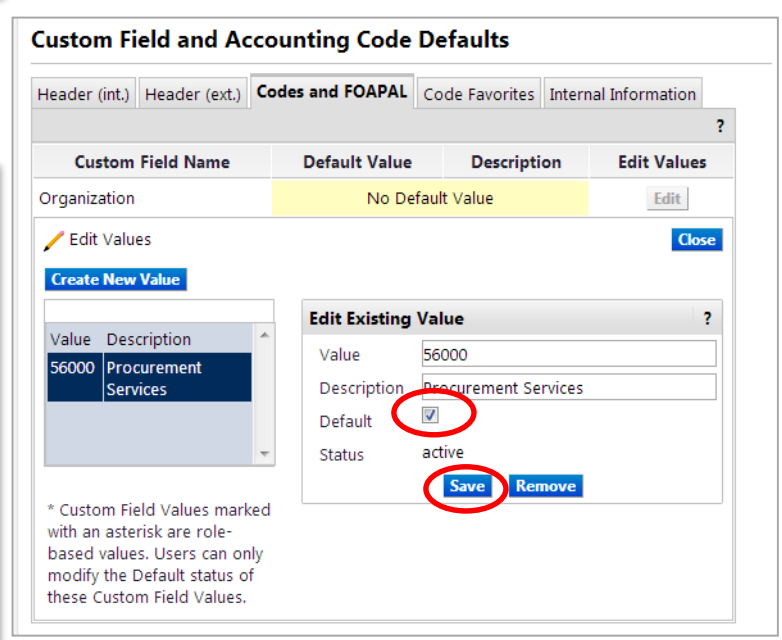
5. In the **Search for Value** dialog box, in the **Value** field, type in the code number in the box. Click **Search**. One search result will be returned.



6. Put a **check** in the checkbox and click **Add Values.** The value will be added to the list on the left.



7. To enable a **default value**, select the number from the list on the left.



8. Put a check in the **Default** checkbox and click **Save**.
9. Repeat this process for your Fund, Account, and Program codes.

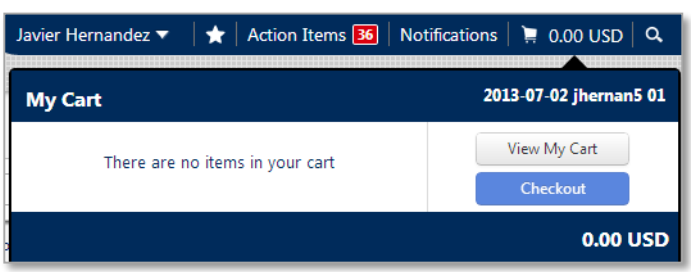
Shopping Using Punchout Catalogs

1. Access to online **punchout** catalogs is provided to make shopping easy. You leave (punch out) of buyND and go to a supplier's web-based catalog to locate and add items to your shopping cart. The punchouts are conveniently displayed in the **Supplier Showcase** on the Home menu.

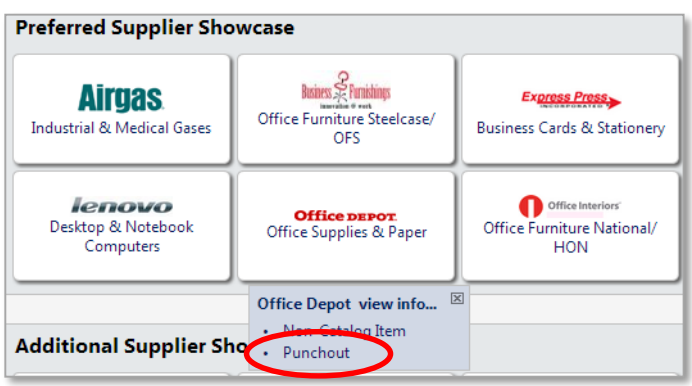
2. Though each supplier's catalog may vary in appearance and functionality, use these tips to navigate a catalog:
   a) Use the **Search** function to locate items directly.
   b) To select an item, enter a **quantity** and click **Add to Cart**.
   c) Complete the checkout process to bring your items back to buyND.

3. **Note**: A special icon will indicate if a punchout is running slowly (yellow warning triangle) or is unavailable (red X).

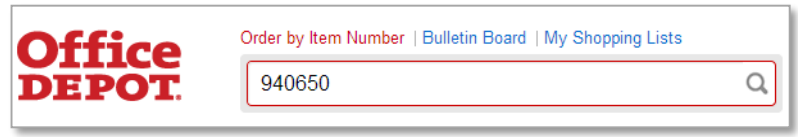
4. For example purposes, we will be walking you through an **Office Depot** punchout order. From the **Home** tab, check to see if you have an **active cart**. You can start shopping if it is empty, or if it has products from the same supplier.



5. Click the Office Depot icon from the Preferred Supplier Showcase and choose Punchout.

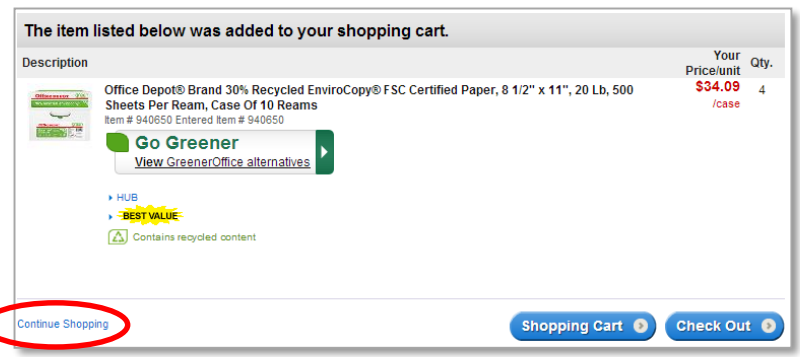


6. Once you're inside the catalog, in the **Search** function, type your **keyword** or **item number**. In this example, we are purchasing 30% recycled content paper, item # 940650. Click **Search**.



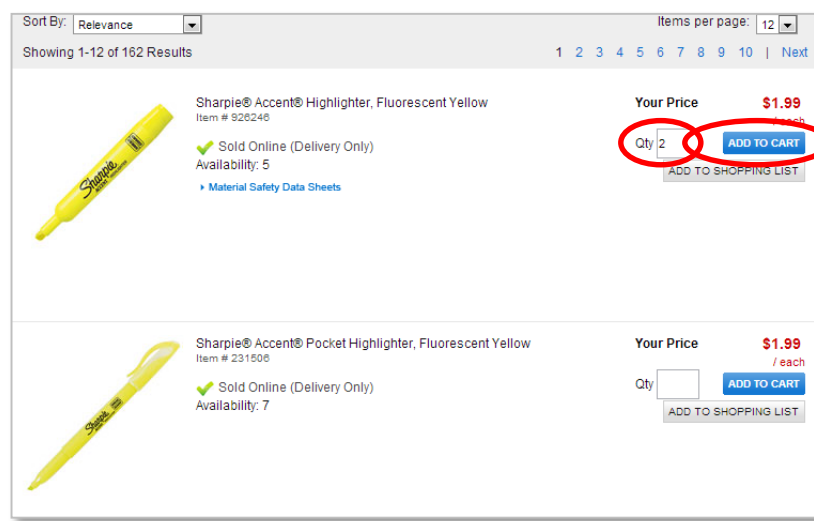
7. In the **Quantity** field, type in 4 and then click **Add to Cart**.

8. An updated cart will appear. Since we want to continue shopping in this example, we will click **Continue Shopping**.



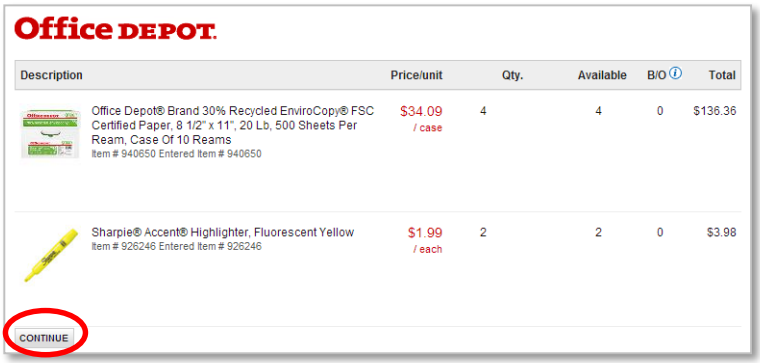
9. To do a **text search** for the next item, in the **Search** field, type highlighter. Click **Search**. A search results list will appear.

10. Choose any highlighter listed. In the **Quantity** field, type 2 and click **Add to Cart**. Your order will update with the new item and subtotal.

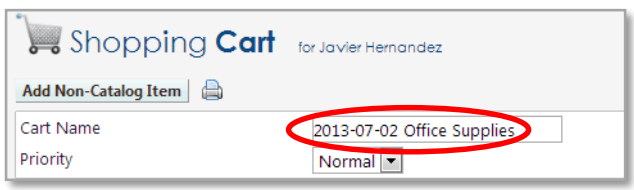


Punchout Catalogs (cont.)

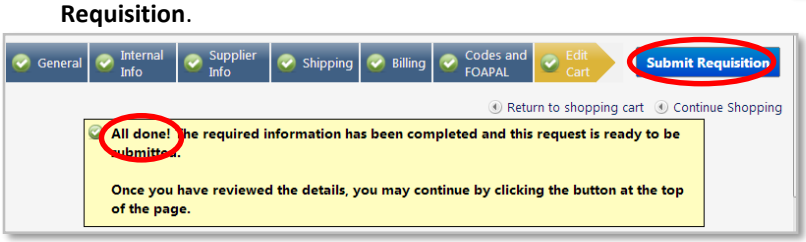
11. To complete the checkout process, click **Checkout** and then click **Continue**. You will now be returned to buyND. A shopping cart screen will display showing the current information associated with your cart.



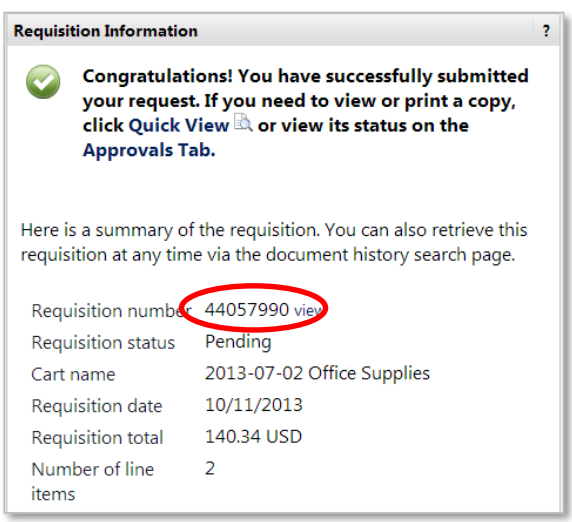
12. To create a cart name for your reference, in the header section, highlight the assigned **Cart Name** and type a name of your choice. Naming your cart will help you identify it more easily later on. Click **Save**, then click **Proceed to Checkout**.



13. Examine the details of your cart, checking the **Ship To**, **Codes and FOAPAL** information. If any required information is missing, the system will default to that section. If all the required information has been completed, you will see an **All done!** at the top of the requisition.
14. Now you're ready to submit your order. Click **Submit Requisition**.

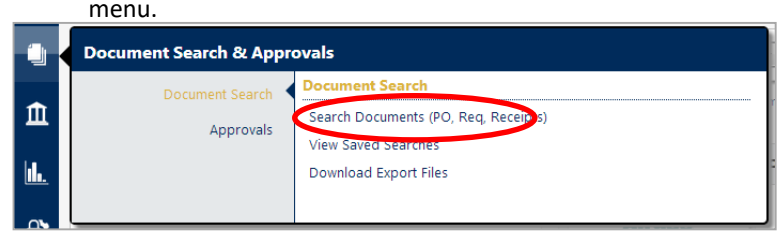


15. A screen will appear indicating that your requisition is complete and showing the assigned **Requisition number**.

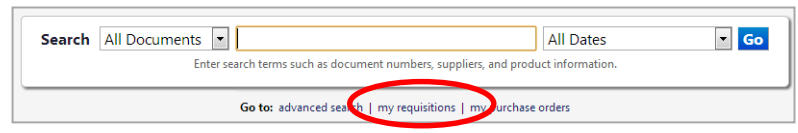


Copy Cart Feature

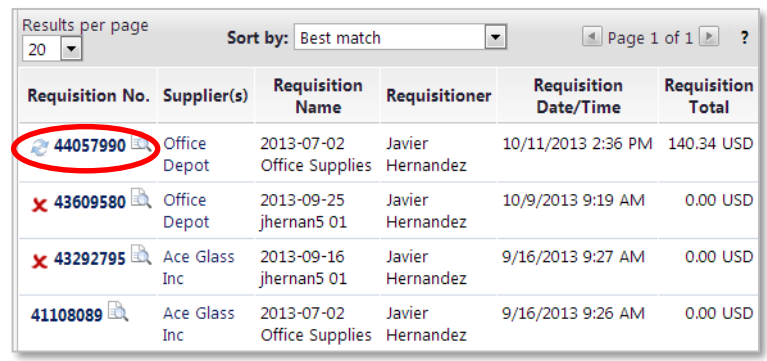
1. If you order the same items on a regular basis, you can copy the requisition with the items you previously ordered and submit a new order. Just make sure you review the requisition prior to submission.
2. From the **Home** screen, click on the **Document Search** menu and then the **Search Documents (PO, Req, Receipts)** sub-menu.



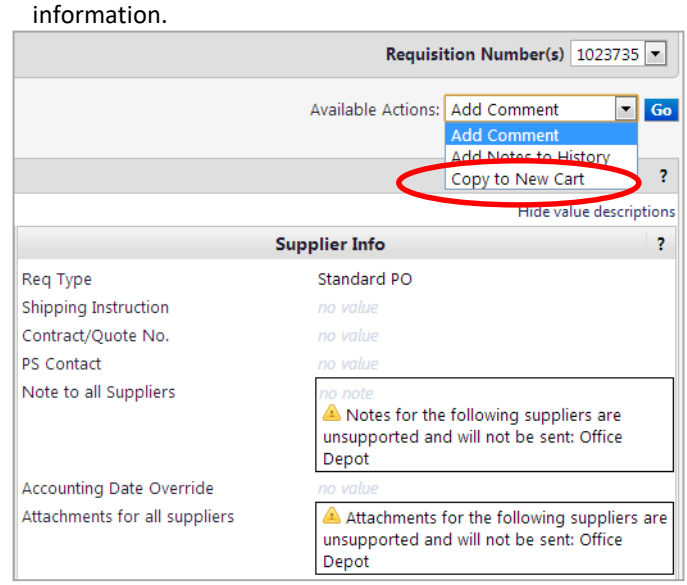
3. Choose **My Requisitions**. All of your requisitions will appear.



4. Choose the requisition you want to copy by clicking on the number. The requisition will appear on screen.

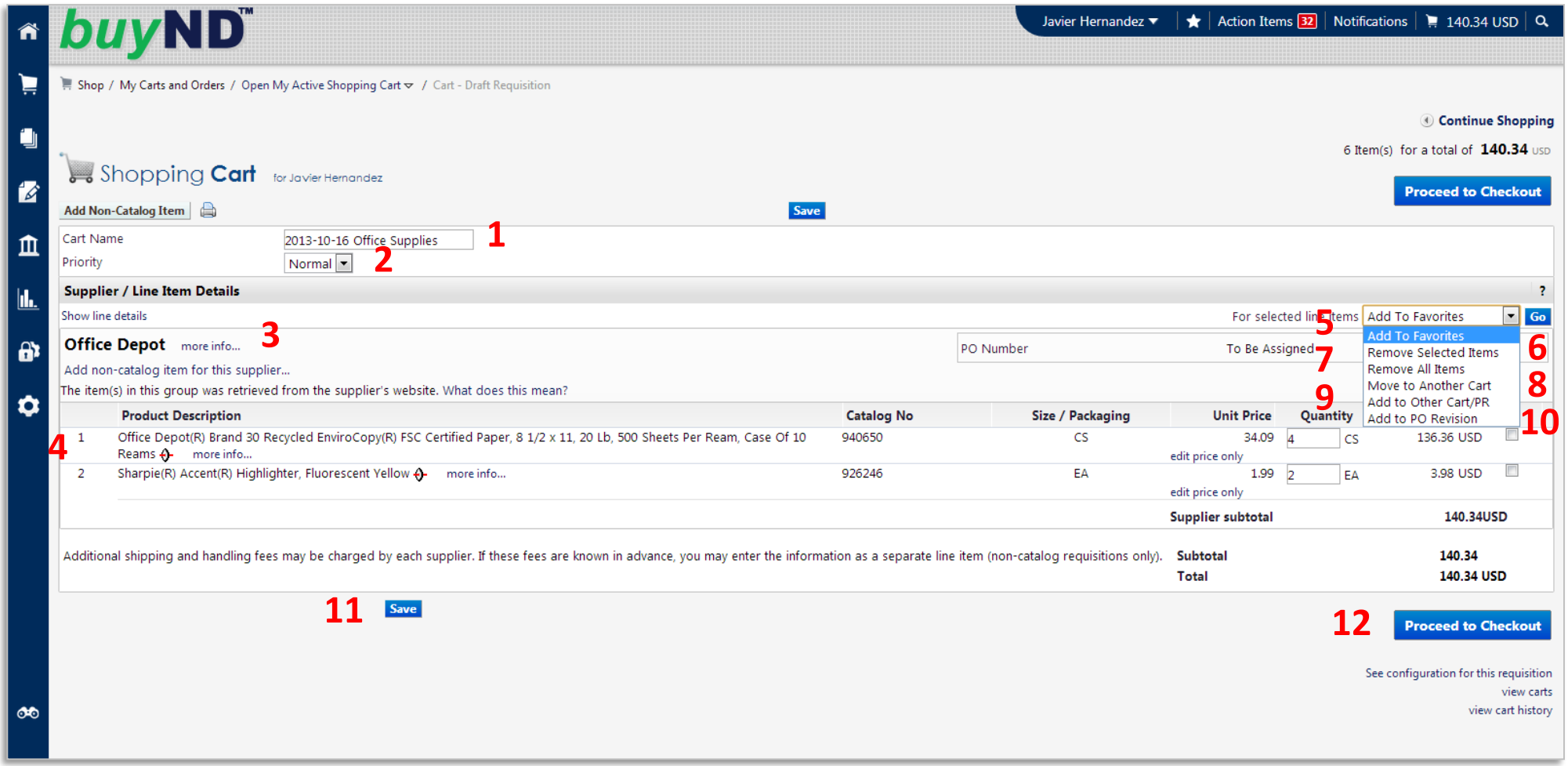


5. From the **Available Actions** drop-down menu, choose **Copy to New Cart**. Your requisition will be duplicated with the exact information.



6. Your requisition will appear on screen. Verify the information.
7. You can now make any changes needed to your requisition and then proceed through the checkout process outlined previously.

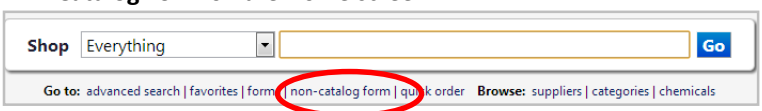
Understanding the Shopping Cart



1. **Cart Name**- the name of this cart. Naming your cart will help you identify it more easily later on.
2. **Priority**- orders marked Urgent will be given priority in the approval queue by the Procurement Specialists.
3. **Supplier**- the name of the supplier fulfilling the order.
4. **Items**- displays the items that are being ordered as well as the Subtotal for the order.
5. **Favorites**- adds item to Favorites. You will be able to add the item to any favorite folder.
6. **Remove Selected Items**- removes only selected items within the cart. Use the checkboxes to indicate which items are subject for removal and press **Go**.
7. **Remove All Items**- select this option to empty the cart. Press **Go**.
8. **Move to Another Cart**- move items between draft carts. This action moves the product information as well as any explicit line-level settings.
9. **Add to Other Cart/PR**- allows you to add one or more selected items to any of your draft shopping carts.
10. **Add to PO Revision**- allows you to add to a purchase order revision. This action is only for purchase orders that have completed the approvals portion of workflow.
11. **Save**- click to save any changes made to the cart.
12. **Proceed to Checkout**- click to continue the checkout process and review the requisition before submission.

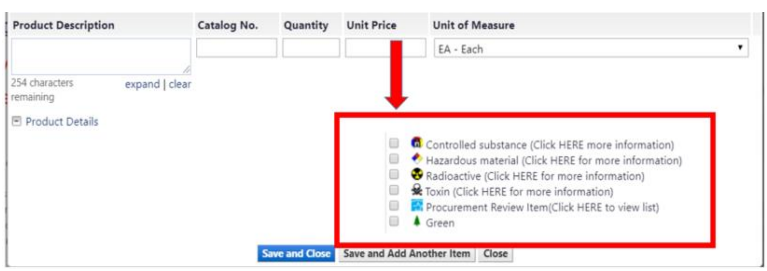
Creating a Requisition Using a Non-Catalog Supplier

1. buyND makes it easy to submit paperless requisitions for suppliers who do not have online catalogs.
   a) **Note:** The supplier must be in the buyND database to be used on the non-catalog form. If you do not find a supplier, please fill out the **Supplier Add Request Form** found on the **Home** screen.
2. To place an order with a non-catalog supplier, click on **Non-Catalog Form** on the Home screen.

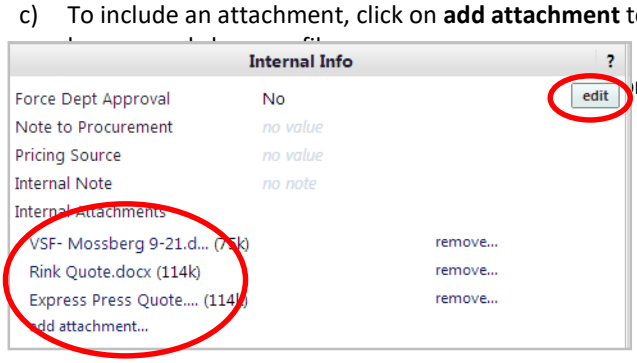


3. Under **Enter Supplier**, enter the name of the supplier you wish to send the requisition to. Click on the name to choose the supplier.
4. Enter the appropriate information in the **Product Description**, **Catalog No.**, **Quantity**, **Unit Price**, and **Unit of Measure**. If you have another item to enter, click **Save and Add Another Item**. If you are done adding items, click **Save and Close**.

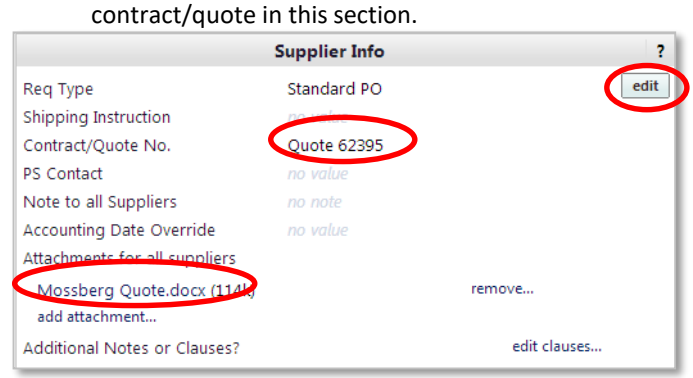
5. You will also be required to check the appropriate product check box, if you will be purchasing a restricted item and are NOT ordering from a Punchout or Hosted Catalog. For more information on each category, click on the **Product label** within the form.



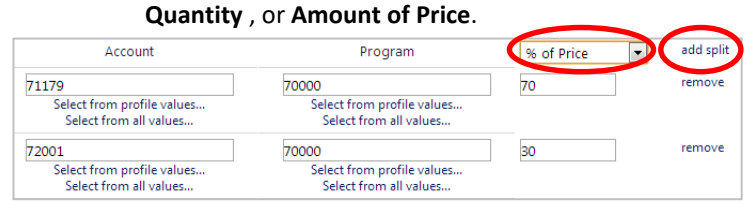
6. To complete the non-catalog order, click on your **active cart** in the **top banner**. Click **Checkout**. The system will now let you review your order and edit information before you submit it.
7. **Internal Information**
   a) Click **edit** to add a note regarding this request. This note is not visible to suppliers.
   b) All of the fields are optional.
   c) To include an attachment, click on **add attachment** to



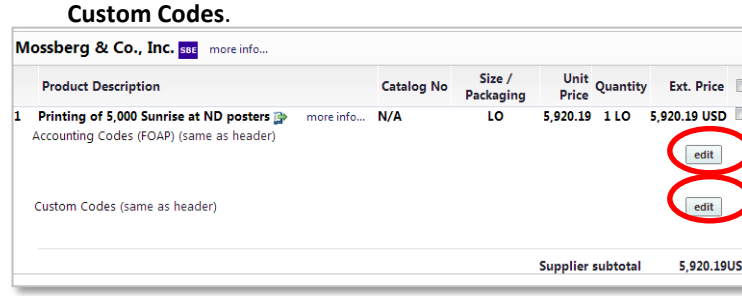
7. **Supplier Information**
   a) Click **edit** to add a note regarding this request. This note is visible to suppliers.
   b) All of the fields are optional.
   c) Add a **Contract/Quote No.** when available.
   d) To include an attachment, click on **add attachment**.
   e) For **orders over $5,000**, attach the winning vendor's contract/quote in this section.



8. Changing the FOAPAL
   a) Click **edit** in the **Codes and FOAPAL** header. You can change the FOAP by typing in your selection or choosing from your profile values.
      I. **Note:** Always check the FOAPAL codes and make sure they are correct and without yellow warning signs.This is where you would correct any error messages.
   b) You can charge to one set of accounting codes or multiple accounting codes, called a **FOAP Code Split**.
   c) The dollar amount of the items can be split between multiple FOAP codes. A split can be applied to the entire order by **Percentage of Price**, **Percentage of Quantity** , or **Amount of Price**.

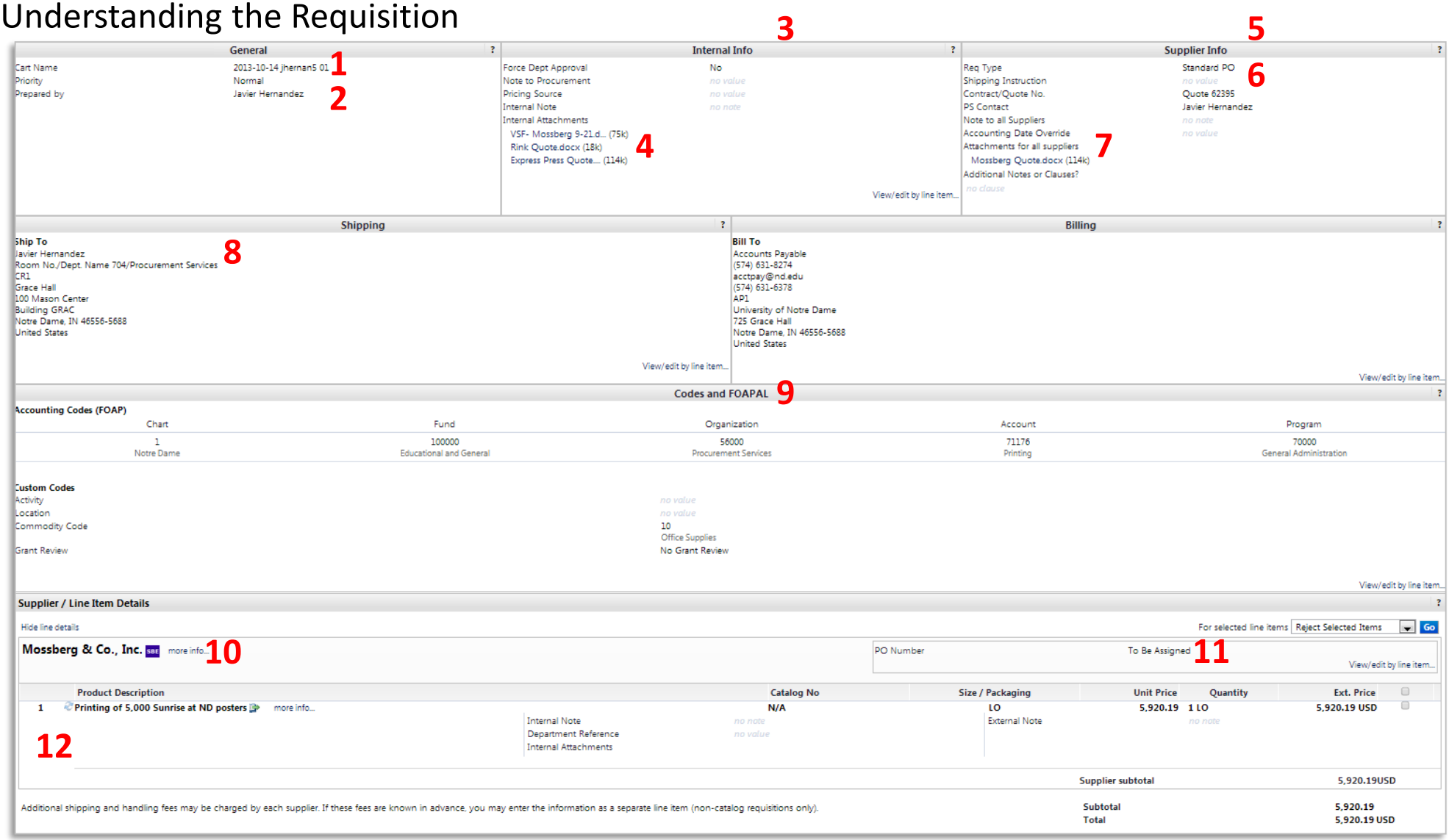


   d) The **Activity** code **(A)**, the **Location** code **(L)**, and other custom codes (**Commodity Code** and **Grant Review**) can be split at the line level.
9. To change the Codes and FOAPAL information per **line item**, click on the **Codes and FOAPAL** tab at the top of the requisition and then **edit** next to **Accounting Codes (FOAP)** or **Custom Codes**.



12. Click the **Submit Requisition** button. A screen will appear indicating that your requisition is complete and showing the assigned requisition number.

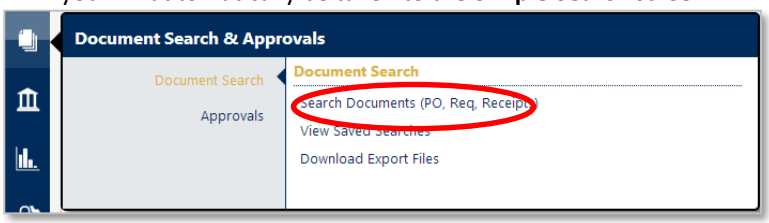
Understanding the Requisition



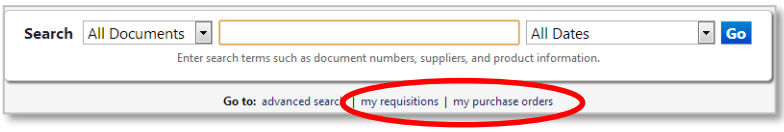
1. **Cart Name**- the name of this cart. Naming your cart will help you identify it more easily later on.
2. **Priority** -orders marked Urgent will be given priority in the approval queue by the Procurement Specialists.
3. **Internal Information**- add a note regarding this request. This note is not visible to suppliers. All fields are optional.
4. **Internal attachments**- lick on add attachment to browse and choose a file.
5. **Supplier Information**- add a note regarding this request. This note is visible to suppliers. All fields are optional.
6. **Req Type**- the default is Standard PO. You can change this to designate a Blanket or Contract PO.
7. **Attachments for all suppliers**- click on add attachment to browse and choose a file.
8. **Ship to**- displays the shipping address associated with the requisition.
9. **Codes and FOAPALs**- the FOAPAL that will be billed for the items that are being ordered.
10. **Supplier**- the name of the supplier fulfilling the order.
11. **PO Number**- the PO number associated with the order.
12. **Items**- displays the items that are being ordered as well as the Subtotal for the order.

Searching/Tracking Requisitions and Purchase Orders

1. The **Document Search and Approvals** menu contains the **Document Search** sub-menu, which allows you to search POs, Requisitions, and Receipts. The first time you visit this menu, you will automatically be taken to the **Simple Search** screen.

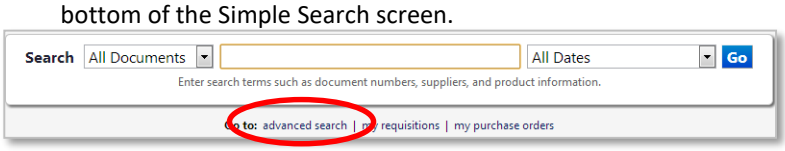


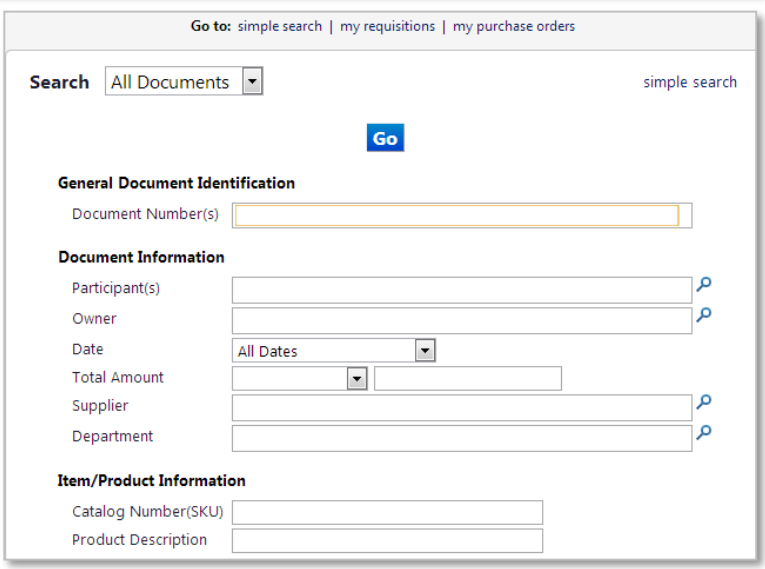
2. You can access your requisitions and purchase orders for the last 90 days by clicking on **my requisitions** or **my purchase orders** at the bottom of the **Simple Search** screen.



3. For a **Simple Search**, there are three main selections:
   a) What type of documents do you want to search? Select to search on a specific document type, **Requisition**, **Purchase Order**, **Receipt**, or **All Documents.** The default is to search across all documents.
   b) What are you looking for? The following information can be entered into the search box: requisition number, purchase order number, catalog number, receipt number, user name, email address, etc.
   c) How do I find requisitions and purchase orders within a certain date range? Users can select from relative date ranges for the query. You can choose from number of days, calendar span, fiscal year, or custom date ranges.

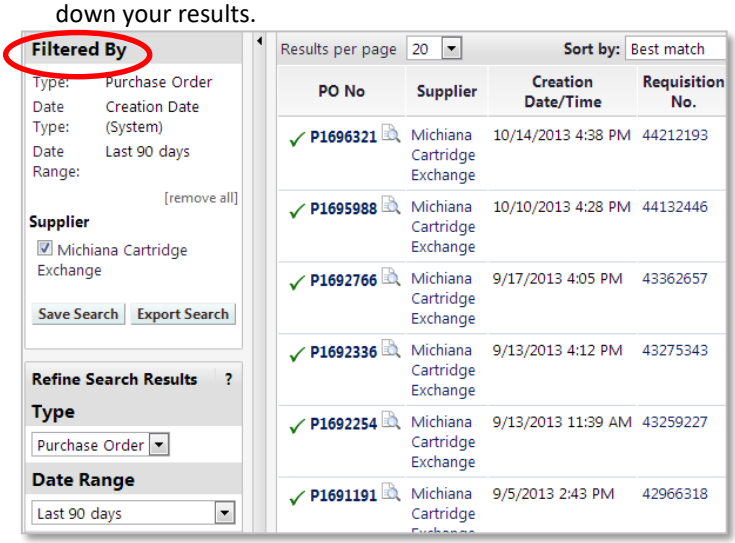
4. **Advanced Search** gives you the option to enter very specific, detailed search criteria. You can perform an advanced search across multiple documents or select a specific document type. To switch to Advanced Search, click **advanced search** at the bottom of the Simple Search screen.



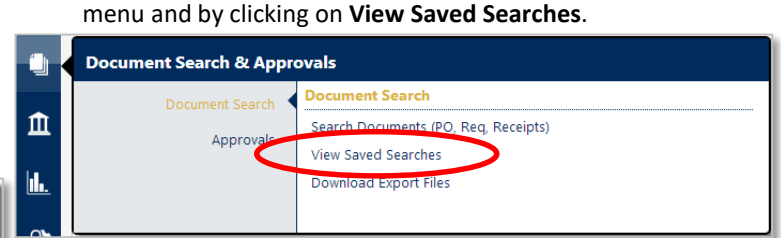


5. You can set the **Date** range prior to your search or filter your results after they display. Date range selection can happen four different ways:
   a) **Day**: Last 7 days, Last 30 days, Last 60 days, Last 90 days, Last 120 days, Yesterday, Today, Last Week, This Week.
   b) **Calendar**: Month-to-Date, Last Month, Year-to-Date, Previous Year.
   c) **Fiscal**: Year-to-Date, Previous Fiscal Year.
   d) **Other**: Before X Date, After X Date, Last X Days, Next X Days, Before the Last X Days, After the Last X Days.

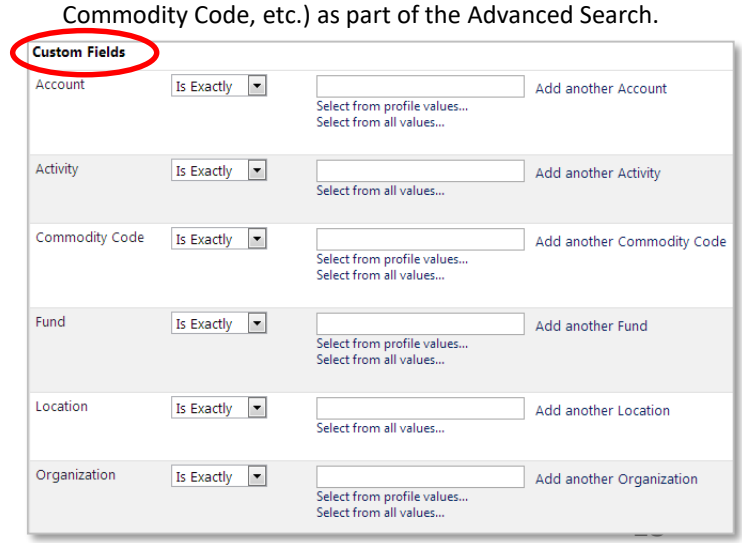
6. After performing a search, **filter options**, which display on the left side of the search results, are available to further narrow down your results.



7. Searches can be saved and executed at any time. Saved searches are accessed through the Document Search sub-menu and by clicking on **View Saved Searches**.

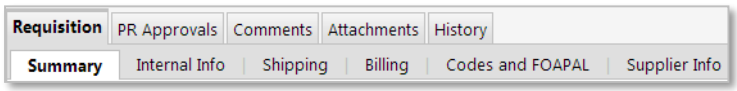


8. You can also search by **Custom Fields** (Fund, Org, Account, Commodity Code, etc.) as part of the Advanced Search.

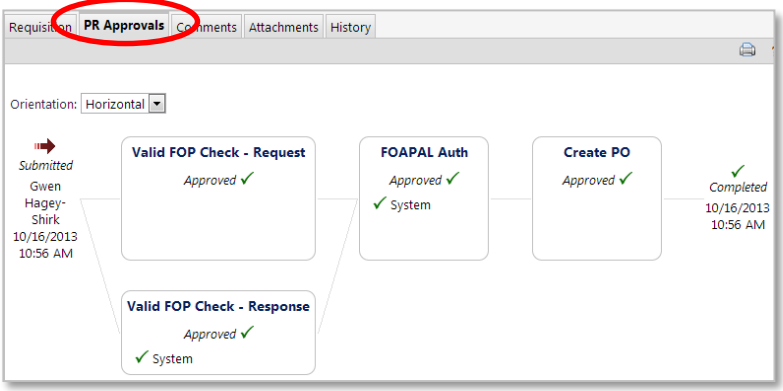


Searching/Tracking (cont.)

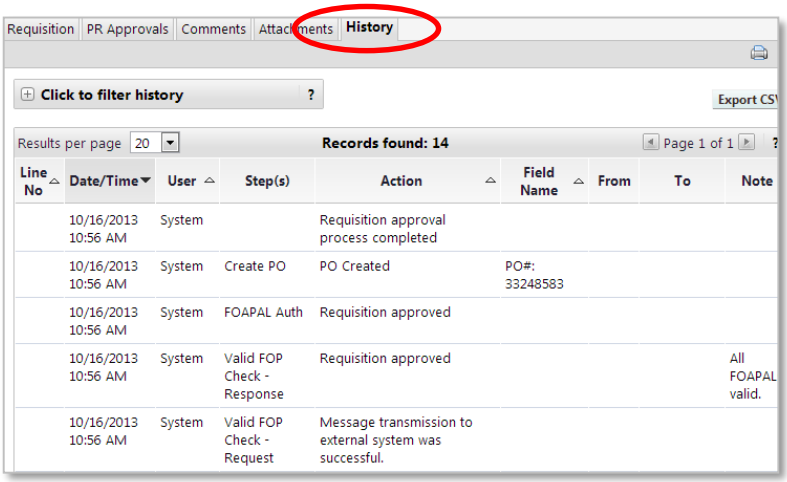
9. To view the **details** of a requisition, click on the **requisition number**. The requisition screen will have several tabs to access various information about the requisition.



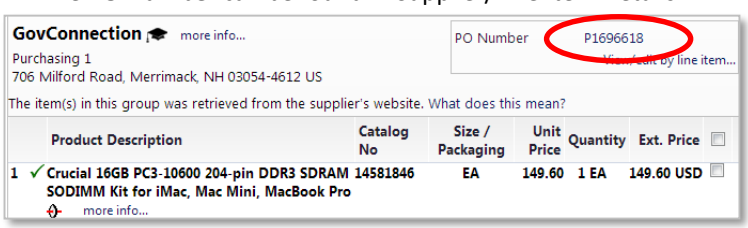
10. **Summary**: Provides the Header information, the cart name, PO number, and basic information on the items ordered.
11. **Codes and FOAPAL**: Provides FOAPAL header and line item detail information.
12. **PR Approval**: This tab gives a graphical representation of the workflow process and status.



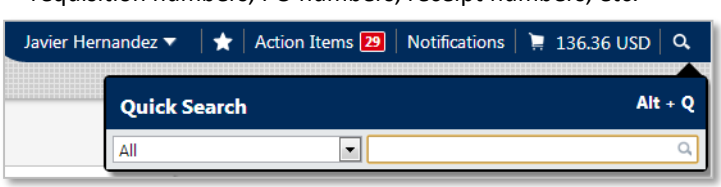
13. **History**: This tab shows a chronological history of the actions taken on the requisition. It includes date and time, the user name, the action take and steps, as well as any notes



14. The **PO Number** can be found in Supplier/Line Item Details.

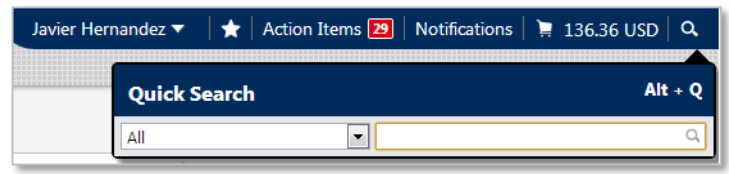


15. You can also use the **Quick Search** feature to search for your requisition numbers, PO numbers, receipt numbers, etc.

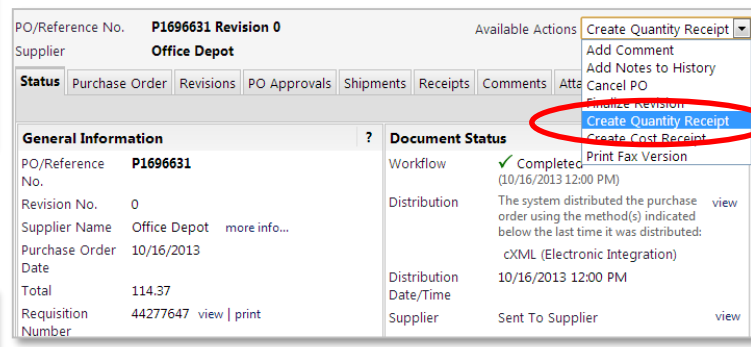


Receiving Against Your PO

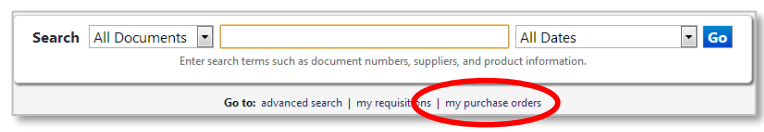
1. **Receiving** indicates that products have been received or services have been completed. It is the **authorization** for **Accounts Payable** to pay the supplier's invoice.
2. Receiving should be done **within two business days** of physical receipt of most items. Receiving on high-cost items can wait until the items and their conditions can be verified.
3. If you know your PO number, start by typing in the number in the **Quick Search** feature. You can also search for your purchase order in the **Document Search** sub-menu.



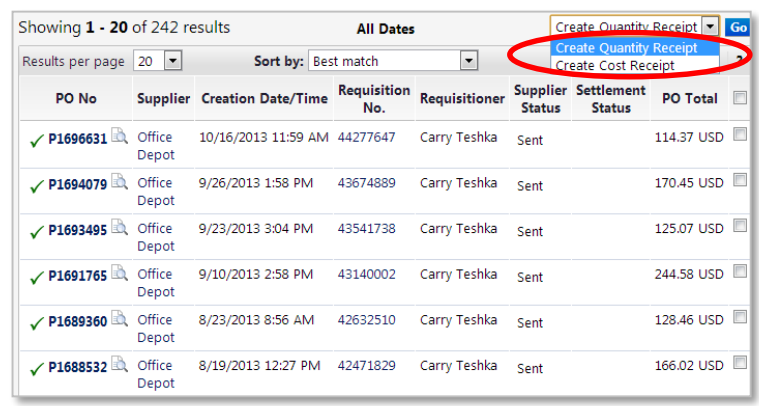
4. After you open the purchase order, click on **Create Quantity Receipt** for **Standard Purchase Orders** or **Create Cost Receipt** for **Blanket Purchase Orders** from the **Available Actions** drop-down menu in the upper right corner of the purchase order.



5. If you do not know your PO number, click on my purchase orders on the **Simple Search** screen found in the **Document Search** sub-menu.

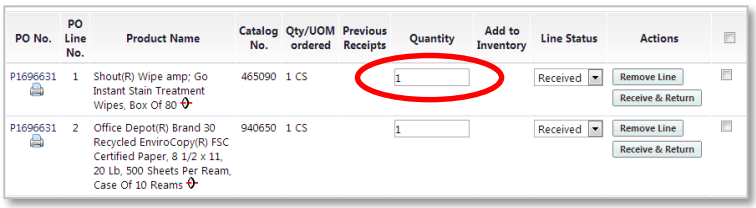


6. From the search results, find the PO and check the box at the end of the PO line next to the dollar amount. Now choose **Create Quantity Receipt** or **Create Cost Receipt** from the drop-down menu and click **Go**.

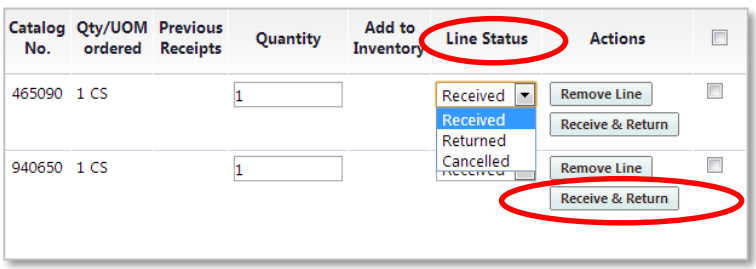


Receiving Against Your PO (cont.)

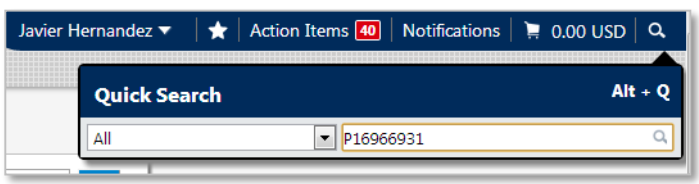
7. Scroll down to the editable number field displayed for each line item. The default **Quantity** entered in the field reflects the quantity of the items that has yet to be received.



8. If you are receiving an order and a certain line **item has not been received**, simply **enter zero** in the quantity field for that item.
9. Each line item also has a **Line Status** drop-down menu with three options:
    7. **Received**: The item/service has been received.
    8. **Returned**: The item was previously received but is now being returned. You will need to enter a reason for the return on the Review screen and notify the supplier.
    9. **Cancelled**: The item ordered will never be received, such as a discontinued item or a back order time that is unacceptable. You will need to notify the supplier that you no longer need the item.

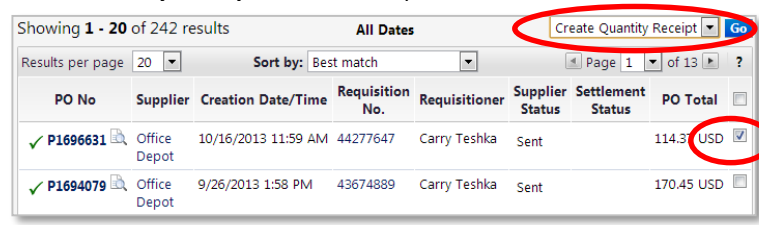


10. In the **Actions** column, there is a **Receive & Return** button. This is for an item that was received in the shipment, but is being returned. You will need to enter a reason for the return on the **Review** screen and notify the supplier.
11. To complete the receipt, click **Complete** at the bottom of the requisition. A **Receiving Document Number** will appear. Clicking on the number will display the document.
9. For example purposes, we will be walking you through receiving a purchase order. Search for your purchase order number using the **Quick Search** feature or through the **Document Search** sub-menu.

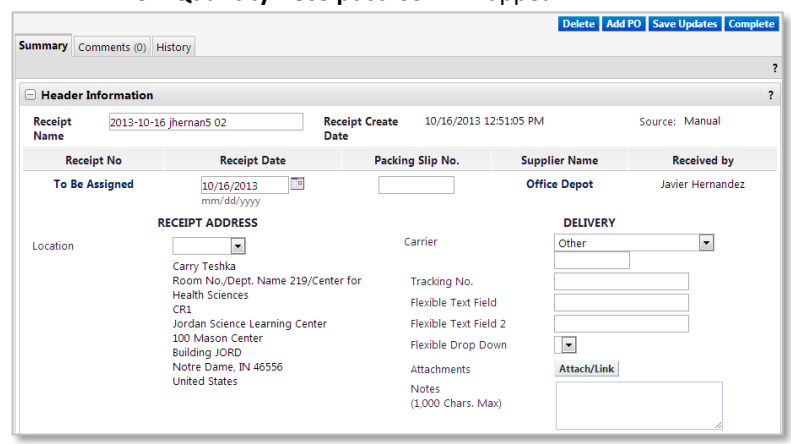


10. If you do not know your PO number, click on my purchase orders on the **Simple Search** screen found in the **Document Search** sub-menu.

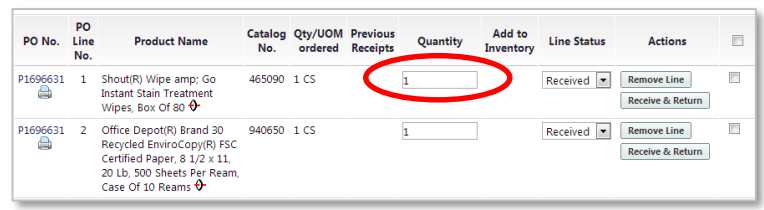
11. From the search results, find the PO and check the box at the end of the PO line next to the dollar amount. Choose **Create Quantity Receipt** from the drop-down menu and click **Go**.



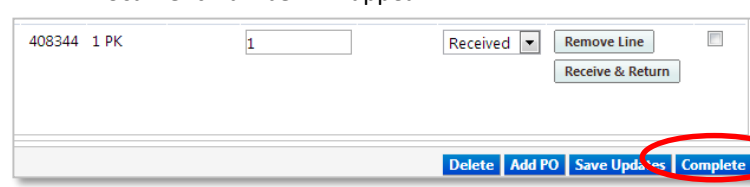
12. A new **Quantity Receipt** screen will appear.



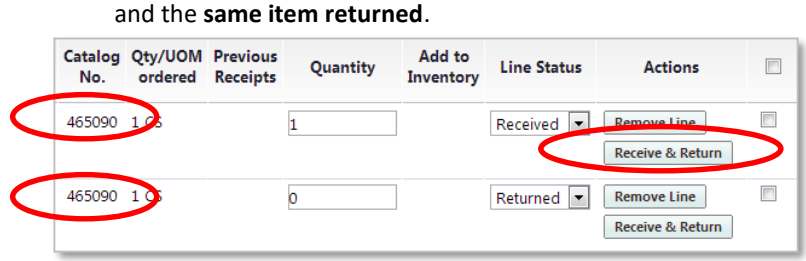
13. Scroll down to the **Line Details** section. The number in the **Quantity** field of a line item will default to the quantity of the item that remains to be received.



14. If the quantity received equals the quantity ordered, click **Complete** at the bottom of the requisition. A **Receiving Document Number** will appear.

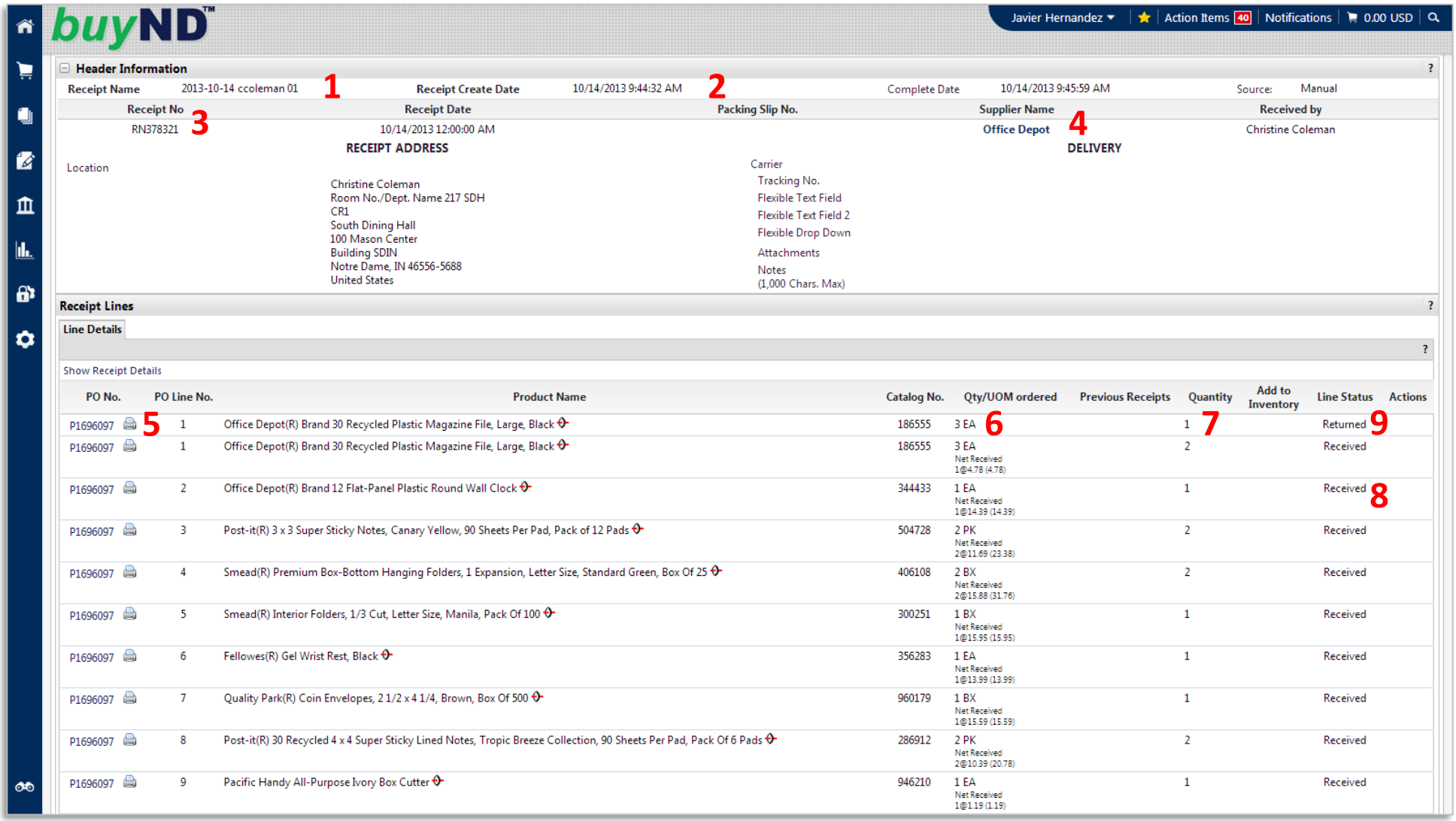


15. If you want to return all or part of an item, click **Receive and Return**. An extra line appears and shows the **item received** and the **same item returned**.



16. Enter the quantity you are returning in the second line. Click **Save**. You will now need to state a reason for the return. Click **Save Updates and Complete**. A Receiving Document Number will appear.

Understanding the Receipt Review Screen



1. **Receipt Name**- enter a name for the receipt. This is a searchable field for finding completed receipts. The default is the current date plus user login.
2. **Receipt No.**- the receipt number is automatically generated by the system when the receipt is completed. The receipt number is displayed on the receipt confirmation page after the **Complete** button is selected.
3. **Receipt No.**- the receipt number is automatically assigned when the receipt is completed.
4. **Supplier Name**- name of supplier of items on receipt.
5. **PO No.**- PO number associated with line item.
6. **Qty/UOM ordered**- the quantity and UOM for the line item on the PO.
7. **Quantity**- the number entered in this field reflects the quantity of the item that has yet to be received.
8. **Received**- the item/service has been received.
9. **Returned**- the item was previously received but is now being returned. You will need to enter a reason for the return on the Review screen and notify the supplier.
10. **Cancelled**- the item ordered will never be received, such as a discontinued item or a back order time that is unacceptable. You will need to notify the supplier that you no longer need the item.

- For additional training documents, visit: https://buy.nd.edu/buynd/training/
- For video tutorials, visit: https://buy.nd.edu/buynd/video_tutorials/
- For contract and supplier information, visit: https://buy.nd.edu/contracts/
- For procurement specialist information and areas of responsibility, visit: https://buy.nd.edu/contact/

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