2014 Quick Reference Guide

Clemson buyWays Help Desk: 864-656-5581 or **email:** cubuyWays@clemson.edu

1) Getting Started

LOGIN to BUYWAYS

- Click the **buyWays Faculty/Staff icon** on the Procurement Services Home page
- Login to buyWays using your Novell user ID and password
- New Users should complete the New User Request Form located here: http://www.clemson.edu/cfo/procurement/buyWays/newuser.html

2) Profile Set Up

UPDATE PERSONAL INFORMATION

- Click on your name at the top right of the screen, and then **View My Profile**
- Click on the link to the information that you want to modify
- Review/Edit any information
- Click **Save** before clicking on another tab (all pages may not have **Save**)
- Review the **User Guide** on the Procurement Training site for additional instructions on updating your profile default settings

3) Shopping – Creating a Cart

HOSTED SUPPLIER CATALOGS

- From **Shopping Home** page
- Use the **Shop** bar at the top, enter search term, then click **Go**
- For more search options click on the **advanced search**
- Click the **Add to Cart** option , or **Order From Supplier** for desired item
- Click on **View Cart**, to open cart, or **Checkout**, if punchout supplier
- Follow **Submit Active Cart** instructions below at #5

-OR-

EXTERNAL (PUNCH-OUT) CATALOGS

- From **Shopping Home** page
- In the **punch-out catalogs** area, click supplier's icon to begin punch-out session
- Search in supplier's site for items and add to supplier's shopping cart
- Follow supplier's site instructions for returning the item(s) to your active cart
- Follow **Submit Active Cart** instructions below at #5

-OR-

CLEMSON FORMS

- From **Shopping Home page**
- In the **Clemson Forms** section (at the bottom) **click** on the appropriate form
- **Read** form's **Instructions** (on left of form)
- Select from **Available Actions**, **Add and Go to Cart** to enter one item
- Select **Add to Cart**, if you have more than one line item, and continue adding items using the same form. After the last item, select **Add and Go to Cart**
- Click **Go**
- Follow **Submit Active Cart** instructions below at #5

4) Modifying an Active Cart (not all steps in this section are required)

REMOVE ITEMS FROM CART

- Open **Active Cart**
- Click **Check box** to the right of Ext. Price of items that you want to remove
- Select **Remove Selected Items** from **For selected line items** drop down menu
- Click **Go**

APPLY CONTRACT TO ITEM(S)

- When using a form
    - After selecting a supplier
    - Click **select contract**
    - Choose applicable **contract #**
    - Click **Ok**
- For punch-out item, catalog or non-catalog item already added to the cart
    - Click **Select price or contract** before clicking **proceed to checkout**
    - Choose applicable **contract #**
    - Click **Ok**
    - Click **Save**

CHANGE PRODUCT QUANTITY

For Catalog items only already added to cart

- Modify number in **Quantity** field
- Click **Save**

For Form Quantities and Amounts Already Added To Cart

- Click on **the product description** of item to open the form
- Modify the quantities and/or amounts
- Select **Save** in the drop down menu and click **GO**
- **Close** the form window – continue with Step # 5 below

For Punch-out items – not available for all punch-out suppliers

- Click **Modify Items** (above **Product Description** field)
- Modify quantity
- Click Checkout / follow supplier's check out procedures

-OR-

- Remove items from cart
- Return to supplier's punch-out site to add necessary quantities

MODIFY ACCOUNTING CODES AT THE HEADER

- Click **Proceed to Checkout**
- Click **Accounting Codes** tab at top
- Click **Edit** in the **Accounting Codes** box(the top codes is the Header level)
- Enter the appropriate code in the corresponding box *-OR-*
  Click **Edit**, then, Click **Select profile values**, **Select a CU value** or **Select from your code favorites** for pre-saved values
- Click **Save**

SPLITTING ACCOUNTING CODES AT LINE

- Click on **Accounting Codes** tab
- Click **Edit** at line (this will apply to the line and override the Header values)
- Click **Add split**
- Select **% of Qty**, **% of Price**, **Amount of Price**, or **Amount of Qty**
- Click **Select profile values** or **Select a CU value** or **Select from your code favorites** to choose pre-saved values for accounting codes
- Enter correct **%** or **amount** beneath the price/quantity drop down menu for each chart string
- Click **Save** to confirm changes

ADD INTERNAL NOTES AND/OR ATTACHMENTS

- Click **Proceed to Checkout**
- In the **Internal Notes and Attachments** section, click **Edit** button
- **Add** a note
- Click **Save** ***OR***
- Click **add attachment**
- Click **Browse** to find attachment
- Choose attachment
- Click **Save**

ADD EXTERNAL NOTES (TO SUPPLIERS)

External notes and attachments are for Clemson forms or non- catalog items **only**

- Click **add attachment**
- Click **Browse** to find attachment
- Choose attachments
- Click **Save**

5) Submit or Assign An Active Cart

- Once lines/items have been added to cart and modified if necessary
- Click **Proceed to Checkout** button above order and review order for accuracy
- Click **Assign Cart to Requisitioner** and select assignee, add note to requisitioner if needed
- Click **Assign**

-OR-

For Requisitioners - skip previous step, click **Submit Req for Approvals**

6)Tracking a Requisition

FIND A REQUISITION

- Click **Orders and Documents Icon** (at the left)
- Click **Search Documents**
- Choose **my requisitions, All Records,** etc.
- Select a **date range** at the left
- You can filter the search by **Supplier, Prepared By, Approved By**, etc.
- Click the **Requisition Number** link
- View the summary detail, approval status or history and add comments if needed

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(7) Withdrawing a Pending Requisition

WITHDRAW ENTIRE REQUISITION

- Click **Orders and Documents** icon (to the left)
- Click **Search Documents**, then **my requisitions**
- Click the **Requisition Number** link
- In **Available Actions** drop-down menu, select **Withdraw Entire Requisition**
- Click **Go**
- In message box **type your reason**
- Click **Withdraw Entire Requisition**

WITHDRAW A LINE

- Click **Orders and Documents** icon (to the left)
- Click **Search Documents**, then **my requisitions**
- Click the **Requisition Number** link
- Check the appropriate **checkbox** to the right of item price
- In **For selected line items** drop-down menu, Select **Withdraw Selected Items**
- Click **Go**
- In message box **type your reason**
- Click **Withdraw Line Items**

(8) Receiving - Creating a Receipt

CREATING A RECEIPT

- Click on the **Notifications** tab at top right, click **to see all notifications**
- Click on PO number that you want to receipt
- From **Available Actions** drop-down menu, choose **Create Qty** or **Create Cost Receipt** and click **Go**
- The receipt will automatically be populated with the PO information
- Enter **Packing Slip #** (required), and/or Notes (when necessary)
- Review all line level data for qty and cost accuracy
- Select **Complete** at the top or bottom of the page

CREATING A PARTIAL RECEIPT

- Click on the **Notifications** tab at top right, click **to see all notifications**
- Click on PO number that you want to receipt
- From the **Available Actions** drop-down menu, choose **Create Qty or Create Cost Receipt** click **Go**
- Review and **modify** pre-populated quantity or amount
- If line item(s) have not been received, click **Remove Line**
- Enter **Packing Slip #** (required), and/or Comments (when necessary)
- Review all line level data for quantity and cost accuracy
- Select **Save Updates** and **Complete** at the top or bottom of the page

CREATING A RECEIPT WITH RETURN/CANCELLED

- Click on the **Notifications** tab at top right, click **to see all notifications**
- Click on PO number that you want to receipt
- From the **Available Actions** drop-down menu, choose **Create Qty** or **Cost Receipt** and click **Go**
- For one of the lines that was previously received, enter a quantity and change **Line Status** to **Returned or Cancelled**
- Review line level data
- Select **Complete** at the top or bottom of the page
- **Must contact supplier for directives on physically returning items**

DELETING A COMPLETED RECEIPT

(Can only be done if an invoice has not been completed)

- From the **search icon** (top right), Select **Receipt Number**
- Enter the **Receipt number**
- Click **Reopen Receipt**
- Click **OK**
- Add appropriate comments (required)
- Click **Add Comment**
- Modify Quantity, Amount, Date or packing slip no.
- Click **Complete** ***-OR-***
- Click **Delete box**
- Click **OK**

DELETING A DRAFT RECEIPT

- Click **Accounts Payable** icon (at left), then click **View Draft Receipts**
- Click **Delete** box beside the drafts you want to delete

(9)Invoicing – Creating an Invoice

CREATING A COMPLETE INVOICE

- Select **Accounts Payable** icon (on the left)
- Click on **AP Dashboard**
- Enter PO number and select **Create** or click **Go**
- **If you need to add attachments, choose hold for pickup, etc., then, click on View Detailed Manual Entry** (at left, above **Simple Manual Entry**)
- Enter **required fields** (Invoice #, Invoice date, and County) and click **Save**
- Ensure line quantities and amounts match the supplier's invoice quantities and amounts
- Modify tax when necessary in the top (header section)
- Click **Review** box at top right corner
- Click **add attachments** (in Notes/Attachments box) to attach a scanned copy of the supplier invoice when possible
- Click **Complete** (a **Create** box will display to continue creating invoices)

VERIFY PAYMENT OF A COMPLETE INVOICE

- Refer to the **Payment Information** box on a completed invoice to view payment date, status, method and record number

(10)Modifying a Purchase Order

CANCEL A PO OR PO LINE

- From the **Shopping Home** page, under **Internal Request Forms**
- Choose **PO Change Request** form
- **Read** form **Change Instructions**
- **Enter** required fields (in bold)
- Select **Add and Go to Cart** and Click **Go**
- See instructions for **Submit an Active** Cart at #5

INCREASE QTY OR PRICE ON PO

- **Option 1** – follow cancel instructions above and create a new PO to increase
- total purchased value,
  Option 2 – create a new order for the difference referencing the original PO number in internal notes section

(11) Approve/Reject a Pending Requisition

APPROVE via EMAIL

- Set up Email Approval Code under **my profile, User's Name, phone, etc,** enter
- **approval code** and click **Save (Must be setup prior to receiving email notice)**
- **Open** Approval Email
- Review Requisition details
- Click **Take Action**
- **Select** an Action
- Enter **Email Approval Code**
- Click **Submit**

APPROVE In buyWays

- Click on **Action Items**, at top right
- Click on **Requisitions to Approve**
- If multiple folders, click on the one you want to take action on
- Review the items, ship to address, Accounting Codes, notes, etc
- Select **Approve**, or select check box, and then choose **Approve/Complete Step** and **Go**, in the **Available Actions** drop-down menu

REJECT A REQUISITION

- **Click on Action Items, at top right**
- **Click on Requisitions to Approve**
- **Click on requisition number to view the complete requisition**
- **From Available Actions select assign to myself, click Go**
- **From Available Actions, select Reject Requisition**
- **Click Go**
- **Reject Line Reason box appears - type in your reason for rejecting the item(s)**
- **Click Reject Line Items**
- **Select Approve/Complete Step in the Available Actions drop-down menu**
- **Click Go**

For additional approver options view the Approval Training document on the Procurement Services Training website:
http://www.clemson.edu/cfo/procurement/buyWays/training.html