1 Instructions for the Penn State Shopper
Chapter 1. Logging into eBuy+ and Selecting Accounts.

Step 1: From your web browser, type in the following address: http://www.ebuy.psu.edu (Figure 1.1).
Step 2: When the eBuy Home Page displays, click any of the three links (See the Red Boxes) to proceed (Figure 1.2).
**Chapter 1. Logging into eBuy+ and Selecting Accounts (Continued).**

**Step 3:** After typing in your Penn State **Userid** and **Password**, click gray the “Login” button (**Figure 1.3**).

**Step 4:** (Figure 1.4) shows the starting page for all eBuy+ users (Shoppers, Account Reviewers, and Approvers).
Chapter 1. Logging into eBuy+ and Selecting Accounts (Continued).

**Step 5:** Select the “>> eBuy Shoppers” link shown in Figure 1.5.

**Step 6:** The Account Selection screen displays (See Figure 1.6).
Chapter 1. Logging into eBuy+ and Selecting Accounts (Continued).

Step 7: The account selection screen is divided up into three sections (See Figure 1.7). Shoppers who are preauthorized (those who have a Direct Bill Authorization) will see a list (and/or a link) in the red section. Frequently used accounts can be saved to the blue “Account Favorites” section. The green section is where accounts are temporarily stored for each shopping session. Shoppers can take up to 20 accounts for each shopping session. (Note the legend at the top/center describing the 4 icons.) Caution: DO NOT MIX Preauthorized accounts with Non-Preauthorized. Using a mixture will result in all shopping carts needing departmental approvals.
Chapter 1. Logging into eBuy+ and Selecting Accounts (Continued).

Step 8: Selecting the link to your Preauthorized accounts will display a listing similar to the one shown in Figure 1.8. Click inside the checkbox to select the account then scroll down to the bottom and click the “add accounts” button. (Note: The list can be sorted by any of the column headers.

Step 9: The search screen (Shown in Figure 1.9) allows shoppers to do a general search for a charge account. You can get to the search screen by clicking one of the blue “magnifying glass” icons.
Chapter 1. Logging into eBuy+ and Selecting Accounts (Continued).

Step 10: The figures below demonstrate what happens when you mix a Non-preauthorized account with two previously selected Preauthorized accounts. First (Figure 1.10) shows a “Pre-authorized Shopping Limit” of $5,000.00 after picking the two preauthorized accounts. After adding a non-preauthorized account to your Shop With Accounts, the “Limit” drops to $0.00 (See Figure 1.11). (Note: Removing accounts from your Shop With list is simple. Click the Red x to the right of the account you wish to remove.)
Chapter 1. Logging into eBuy+ and Selecting Accounts (Continued).

Step 11: After selecting and reviewing your list Shop With accounts, click the “Go Shopping” button (See Figure 1.12).

Figure 1.12
Chapter 1. Logging into eBuy+ and Selecting Accounts (Continued).

Figure 1.13 shows the eBuy+ landing screen after you have logged in and selected your accounts.
In Figure 1.14 below, you’ll find the main navigation bar is highlighted in red. The search engine (and links to other product related areas) is located in the green highlighted area. Recently completed or Pending work displays in the blue highlighted area. The orange area is where you’ll find News worthy items (e.g. New Catalog Suppliers, Sales, etc.). In the yellow area, you’ll find featured suppliers and featured forms. Below the forms (highlighted in pink) you’ll see the Punch-out supplier icons (click any one of these and you’ll be directed to the supplier’s web site). The last area (highlighted in turquoise) is where you’ll find your Active Shopping Cart Summary and a Quick Search tool. Many of these features will be discussed in greater detail in future chapters of this User’s Guide.
Chapter 2. Hosted Product Search

Step 1: Follow the instructions in Chapter 1 (Logging in and Selecting Accounts)

Step 2: From the eBuy+ “home/shop” screen, type the word “beaker” into the basic search field (See the red box in Figure 2.1 below) and click the yellow “Go” button.

Step 3: Figure 2.2 shows the results of the search on “beaker”. (Note: The screen will illustrate the features available on the search results page.)
Chapter 2. Hosted Product Search (Continued)

Search Results Screen Orientation
You can “Refine” and/or “Filter” the search results using the options highlighted in blue. Expand the number of products displayed by changing the “Products per page” inside the orange highlighted area. Highlighted in green is a place you can change how the search results are sorted (e.g. In addition to the default “Best Match” setting, you can sort by Part #, Description, Size, Packaging, Supplier, Price (Low to High), Price (High to Low)Advance to the next page or choose a specific page to view (highlighted in yellow). And finally, add the product to your shopping cart; add the product to your favorites folder; or do a side-by-side comparison of two or more products (highlighted in pink) (See Figure 2.3).

Figure 2.3
Chapter 2. Hosted Product Search (Continued)

Step 4: When you have found the product(s) you wish to order, simply change the quantity (if necessary) and click the yellow “Add to Cart” button and the product will be added to your Active Shopping Cart. (Note the change in the cart summary information in the upper right corner of the screen. The number of items and amount will increase. Since this was the first item added, the cart summary changed to read “2 item(s)”, and the amount shows “31.10 USD”. (See the two red arrows in Figure 2.4 below.)

Step 5: Continue shopping or follow the steps in Chapter 5, “Edit and Review a Cart”.

Figure 2.4
Instructions for the Penn State Shopper

Chapter 3. Punchout Product Search

Step 1: Follow the instructions in Chapter 1 (Logging in and Selecting Accounts).
Step 2: From the eBuy+ “home/shop” screen, click on the Dell icon (See Figure 3.1).
Step 3: A “Security Information” pop-up displays. Take note of the way the question in Figure 3.2 is worded. Older browser versions ask the question as shown below. The new Explorer 8.0 words the question a little different. The correct answer should permit the “display of nonsecure items”.

Figure 3.1

Figure 3.2
Chapter 3. Punchout Product Search (Continued)

**Step 4:** In the upper right corner of the Dell Premier page, hover over “Quick Links” (See Figure 3.3) which will display the “E-Quotes” sub-link. Click on “E-Quotes”.

**Step 5:** Type the email address of the person who saved the E-Quote and click on “Retrieve E-Quote” (See Figure 3.4).
Chapter 3. Punchout Product Search (Continued)

**Step 6:** Select the desired E-quote Number (See Figure 3.5) and display the saved configuration.

**Step 7:** Click the green “Create Order Requisition” (See Figure 3.6).
**Chapter 3. Punchout Product Search (Continued)**

**Step 8:** When the Shipping screen displays, make sure the “I WILL NOT export this order outside the United States.” is selected...then click the green “Continue” button (See **Figure 3.7**).

**Step 9:** Verify the contents of your shopping cart and then click the green “Submit Order Requisition” button (See **Figure 3.8**) *(Note: you may need to scroll down to see the button.)*
Chapter 3. Punchout Product Search (Continued)

Step 10: The product(s) will return to your eBuy shopping cart (See Figure 3.9)

Step 11: Follow the steps in Chapter 5, “Edit and Review a Cart”.

Note: The cart summary in the upper right corner reflects the number is items and total amount of the Punchout Shopping Session (See Red Arrows). Also...The amount displayed in the cart summary (along with the type of Account you logged in with) will determine if this shopping cart follows a Pre-approved path to the supplier, or requires departmental approvals.
Chapter 4: Non-Catalog Items

Step 1: Follow the instructions in Chapter 1 (Logging in and Selecting Accounts).

Step 2: From the eBuy “home/shop” screen, click on the “non-catalog item” link highlighted in red in Figure 4.1 below. A blank “Non-Catalog Item (POs only) form displays.

Step 3: Choose a supplier1 (See Figure 4.2)

Step 4: Complete the following fields: Product Description2, Catalog No.3, Product Size4 (Optional), Quantity5, Price Estimate6, Packaging7, Commodity Code8, and if applicable select the appropriate attribute flags9. (See Figure 4.2). When you have finished, click the yellow “Save and Close” button (if however, you wish to requisition additional items from this same supplier, click the gray “Save and Add Another” button.)

---

Figure 4.1

Figure 4.2
**Chapter 4. Non-Catalog Items (Continued)**

**Figure 4.3** below illustrates a completed Non-Catalog form.

**Step 5:** For the purposes of this lesson, we will only add the one item.

---

## Refrigeration Hardware Supply Corp

### Non-Catalog Item (POs only)

<table>
<thead>
<tr>
<th>Product Description</th>
<th>Catalog No.</th>
<th>Product Size</th>
<th>Quantity</th>
<th>Price Estimate</th>
<th>Packaging</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dry Ice, 50 lb Bag/Pallet</td>
<td>2018-DRYICE</td>
<td>20</td>
<td>500</td>
<td>50.00</td>
<td>PL - Pallet</td>
</tr>
</tbody>
</table>

Commodity Code: Dry Ice

- Technology Integration Group (TIG)
  - McCartney's
    (Click the supplier's name above for additional information)

---

**General Stores**

- **Office/Computer**
  - [Dell]
  - [Apple]
  - [Lenovo]
  - [TIG]

---

**Other News**

General Stores has Recycled Paper at a very Competitive Price.
Chapter 4. Non-Catalog Items (Continued)

Step 6: Saving and closing the Non-Catalog form will return you to the “home/shop” page (See Figure 4.4).
Step 7: Click on the cart summary link in the upper right corner (highlighted in red) and your newly created shopping cart will display (See Figure 4.5).
Step 8: Follow the steps in Chapter 5, “Edit and Review a Cart”.

Figure 4.4

Figure 4.5
Instructions for the Penn State Shopper

Chapter 5. Edit and Review Cart

Step 1. To Edit/Review a cart, click on the “carts” tab or click on the cart summary in the upper right corner (See Figure 5.1)
Step 2. Add a “Description” to your cart (Optional) (See Figure 5.2)
Step 3. Add any “Internal” or “Supplier” notes by clicking on one or both “add note…” links (See Figure 5.2)
Step 4. Save any changes by clicking the yellow “Save” button.
Chapter 5. Edit and Review Cart (Continued)

Step 5. Click on the “Proceed to Checkout” button (See Figure 5.3)

Step 6. Review (and edit if necessary) any of the following sections: General¹, Shipping², Account String³, Object Code⁴ (See Figure 5.4) (Note: One Shipping Address per Cart, Any number of Account Strings per Cart/Line, One Object Code per line). Once your done you can “Submit Order” or “Assign Cart”
Chapter 5. Edit and Review Cart (Continued)

Step 7. Scroll down and continue your Review.
Step 8. Attach¹ any/all required documents (e.g. Supplier Quote, Sole Source Justification, Supplier Contract, License Agreement, etc.) (See Figure 5.5)
Step 9. Review product details and edit² if necessary. (See Figure 5.5)
Step 10. Tab over to “PR Approvals”³ and preview the required approval steps. (See Figure 5.6) (Note: Not all Penn State units have the same approval steps. Both “Funds Availability Check” steps are automated.)
Step 11. When you’ve completed your Review and made all of your changes, Click the “SubmitOrder”⁴ button. (See Figure 5.6)

Figure 5.5

Figure 5.6
Chapter 5. Edit and Review Cart (Continued)

Step 12. Submitting the order will result in the following “Requisition Information” screen displaying. (See Figure 5.7) Clicking on either the Number (327697) or the word view will take you back to the cart view and you can track the progress.

Step 13. “Current Step” displays above the next action to be completed. Click the “view approvers” link to display a list of possible approver’s email addresses (See Figure 5.8).
Instructions for the Penn State **Shopper**

**Chapter 6. What to do when you have two items in your cart from two different suppliers.**

**Step 1:** After logging in; selecting your accounts; then (after shopping for a while) you realize you have multiple items from two different suppliers in your cart...What do you do? (For demonstration purposes, the shopping cart contains Hand Tools from Grainger and a Wood Shop Standard Set-up Pkg from Allegheny Supply.) See **Figure 6.1**

**Step 2:** Displayed at the top you’ll see the following warning message (in a yellow box) \(^1\) “This requisition will generate more than one purchase order. You will need to move or remove some of the lines before submitting your request.”

---

**Figure 6.1**

![Image of Penn State Shopper interface](image.png)
Chapter 6. What to do when you have two items in your cart from two different suppliers (Continued).

Step 3: To Remove (or Delete) items from one of the two suppliers, simply select the item(s) by clicking inside the check box to the right of the Extended Price. (See Figure 6.2) **Note:** Clicking the check box at the top of the column will select all items from that supplier.

Step 4: Finally, choose “Remove Selected Items” from the drop box and click the yellow “Go” button. (See Figure 6.3)
Chapter 6. What to do when you have two items in your cart from two different suppliers (Continued).

Step 5: The alternative to removing items would be to move them to a separate shopping cart. This way you can still place orders for all items. Select the items you wish to move by clicking the check box to the right of the Extended Price. (See Figure 6.4)

Step 6: From the drop box, select “Move to Another Cart” and click the yellow “Go” button. (See Figure 6.5)
Chapter 6. What to do when you have two items in your cart from two different suppliers (Continued).

Step 7: An overlay displays asking you to select a destination for the items to be moved. The default is “Move to a new cart”. Click the yellow “Move” button and the products(s) will be transferred to a newly established cart. (See Figure 6.6)

Step 8: You should see a confirmation that “The line(s) have been successfully moved.” (See Figure 6.7)...and you’ll notice they have been removed from the underlying shopping cart. Click the yellow “Close” button and the overlay will close.

Please note that the only remaining items are from Grainger.
Chapter 6. What to do when you have two items in your cart from two different suppliers (Continued).

Step 9: Follow the instructions in Chapter 5 “Edit and Review”.
Step 10: To locate the Moved item, Click the “carts” \(^1\) tab and then click the “draft carts” \(^2\) tab. Here you’ll find the item(s) moved back in steps 5 and 6. Next, click on the “Shopping Cart Name” \(^3\) and the cart will open. Follow the instructions in Chapter 5 to finalize this cart. (See Figure 6.8)
**Chapter 7. Non-Catalog Radioactive Item**

**Step 1:** Follow the instructions in Chapter 1 “Logging in and Selecting Accounts”.

**Step 2:** From the eBuy “home/shop” screen, click on the “Radioactive Materials Request” link in the Showcased Services section (highlighted in red) in Figure 7.1 below. A blank “Radioactive Material” form displays. (See Figure 7.2 on next page.)
Chapter 7. Non-Catalog Radioactive Item (Continued)

**Step 3:** Complete the product information **Figure 7.2** section of the Radioactive Materials form\(^1\) (including selecting a supplier\(^2\)). If this is the only item, click the yellow “Go” button\(^4\) to add this single item to a cart. To add multiple items (to the same supplier), select “Add to Cart and Return” from the drop box\(^3\) before clicking the yellow “Go” button\(^4\). (See **Figure 7.3**)
Chapter 7. Non-Catalog Radioactive Item (Continued)

**Step 4:** When you have finished adding items to your cart...click the cart summary in the upper right corner\(^1\) (or click the “carts” tab\(^2\) then click the “draft carts” tab\(^3\) to display your current active cart containing the radioactive item(s). (See Figure 7.4)

**Step 5:** When the cart displays, you’ll notice a “Required field...” error message in a yellow box\(^4\). Click the “Show Line Details” button\(^5\) to select a Commodity Code.

**Step 6:** Scroll down to the Product and click the “edit” button\(^6\) to the right of the Extended Price. This will display an overlay allowing you to see/select the proper commodity code from a drop box\(^7\). (See Figure 7.5) Then click “Save” and Proceed to Checkout

---

**Figure 7.4**

---

**Figure 7.5**

---

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**Chapter 7. Non-Catalog Radioactive Item (Continued)**

**Step 7:** Select “Radioisotopes” from the Commodity list and then click the yellow “Save” button. (See **Figure 7.6**)

**Step 8:** Follow the steps in **Chapter 5** to complete the “Edit and Review a Cart” step.

---

**Figure 7.6**

![Image of a software interface showing the selection process for Radioisotopes and the associated details for a product, such as its description, price, and quantity.](image-url)
Step 1: Follow the instructions in Chapter 1 (Logging in and Selecting Accounts).
Step 2: From the eBuy “home/shop” screen, click on the “non-catalog item” link highlighted in red in Figure 8.1 below. A blank “Non-Catalog Item (POs only) form displays.
Step 3: Click on the “supplier search” link¹ (See Figure 8.2).
Chapter 8. Non-Catalog Item from a New Supplier (Continued)

Step 4: From the “Select Supplier” screen (See Figure 8.3), type in the name of the supplier and click the yellow “Search” button.

Step 5: When the search for your suggested supplier ends with no results (See Figure 8.4), click the yellow “Cancel” button which will return you to the main “Select Supplier” screen.
Chapter 8. Non-Catalog Item from a New Supplier (Continued)

Step 6: Now enter the supplier information. Fill in the empty fields

Step 7: Please indicate how the supplier would like to receive the Purchase Order (if known). (See Figure 8.6) **Note:** As a default, check the “Fax” check box and re-enter the fax number displayed under the supplier’s name. Complete the remainder of the Non-Catalog Item form and click the yellow “Save and Close” button.

Step 8: Follow the steps in Chapter 5 to complete the “Edit and Review a Cart” step.
Instructions for the Penn State Shopper
Chapter 9. How do I place a RUSH order

Step 1: Follow the normal process for logging in and creating a cart. (See Chapters 1 through 4)
Step 2: During the Review step (Chapter 5), click on the “Summary” tab. Then click on the edit button in the “Internal Notes” section and add an explanation for the “RUSH”. (See Figure 9.1)
Step 3: Click on the edit button in the “External Notes” section to add your “RUSH” message to the supplier. (See also Figure 9.1)
Chapter 9. How do I place a RUSH order (Continued)

Step 4: Figure 9.2 shows both the Internal note and External note. **Note: Internal notes will be visible to all approvers throughout the approval process.**

Step 5: After Editing, Reviewing, and Placing the order (Take note of the Requisition Number), return to the requisition by using the “Search for” section in the upper right corner. (See Figure 9.3)
Chapter 9. How do I place a RUSH order (Continued)

**Step 6:** After the requisition displays, select the “PR Approvals” tab. (See Figure 9.4)

**Step 7:** The “Approvals” screen shows both the Current and Future Steps along with a link to display the Current and Future Approvers. You’ll need to refresh the screen to monitor the progress. (See Figure 9.5)
Instructions for the Penn State Shopper

Chapter 10. Ordering multiple items to be charged to different accounts

Step 1: Follow the Login and Account Selection instructions in Chapter 1. 
*Note: Please be sure to select multiple accounts.*

Step 2: Follow the instructions in Chapter 2. 
*Note: Please be sure to add multiple items to your cart.*

Step 3: Display the recently created shopping cart and click the “Summary” button. (See Figure 10.1)

Step 4: Select the “Account String” tab and narrow the view to show the association of Account Codes and Products. Note: All products should display the same indication that “Account String (same as header)” (See Figure 10.1)

---

**Figure 10.1**

![Account String - Draft Requisition](image)

1. You have completed the required information in this step. At this point, you can do the following: Proceed to the next step: Object Code. Go straight to the end: Final Review.

2. Account String

3. Account String (same as header)
Step 5: Since we intend to assign different accounts to each of the products...we’ll want to use the Line Item “edit” buttons. (See Figure 10.2)

Step 6: Select the “edit” button for Line 1.
Step 7: Clicking the “Select from profile values…” will display a drop box. Opening the drop box will display a complete list of the Account Strings selected during the login process (in this example we selected 3 account strings). Choose an account for Line 1 from the drop box. (See Figure 10.3) Likewise...(if required) select an appropriate Cost Center. (See Step 8, Figure 10.5)
Chapter 10. Ordering multiple items to be charged to different accounts (Continued)

Figure 10.4 Illustrates the Account String choices.
Step 8: Clicking the “Select from all values...” under the Cost Center will display a list of associated values. (See Figure 10.5) Select the appropriate Cost Center from the drop box and click the yellow “Save” button. Note: The list below is for illustration purposes only. This may not be an accurate representation of the actual list of cost centers.
Chapter 10. Ordering multiple items to be charged to different accounts (Continued)

Figure 10.6 The Account String/Product List screen displays the changes to Line 1. **Note:** This same change can now be copied to other product lines. Simply click the “copy to other lines” link and indicate which products should receive similar account/cost center changes.

![Account String/Product List Screen](diagram.png)
Chapter 10. Ordering multiple items to be charged to different accounts (Continued)

**Step 9:** Let’s copy the changes made to line 1 and apply them to Line 5. Click on the “copy to other lines” link. (See Figure 10.6)

**Step 10:** When the Account String overlay displays, click the check box\(^1\) at the far right end of Line 5 (See Figure 10.7 below) and then click the yellow “Copy” button\(^2\). The Account String overlay will close and the copied changes can be seen.
Step 10: Follow the steps in Chapter 5, “Edit and Review a Cart”.

Figure 10.8 L Shows the final account assignments (e.g. 0400415 UP 20550\(^1\) is assigned to Line 1 and Line 5, 0500415 UP 20560\(^2\) is assigned to Line 4, and Line 2 and Line 3 are still associated with the “header” account\(^3\).)
Instructions for the Penn State Shopper
Chapter 11. Single item split over multiple accounts

Step 1: Follow the Login and Account Selection instructions in Chapter 1. Note: Please be sure to select multiple accounts.
Step 2: Follow the instructions in Chapter 3.
Step 3: Display the recently created shopping cart and click the “Review” button. (See Figure 11.1)
Step 4: Select the “Account String” tab and narrow the view to show the association of Account Codes and Products. Note: The single product should display the following: “Account String (same as header)” (See Figure 11.1)
Chapter 11. Single item split over multiple accounts (Continued)

Step 5: Click on either “edit” button (Header or Line) and the Account String overlay displays. (See Figure 11.2) Note: Header split types include % of Price, % of Qty, and (NEW) Amount of Price. Line splits are Amount of Qty in addition to % of Price, % of Qty, and Amount of Price.

Step 6: Click the “add split” link three times (for a total of 4 account split lines). (See Figure 11.3)
Chapter 11. Single item split over multiple accounts (Continued)

**Step 7:** Click the “Select from profile values...” link under “Account String” and select an account string for each split. (If required) select the appropriate Cost Center for each account string. **Remember to choose the Split Type and fill in the split amount or percent for each account line.** (See Figure 11.4 for an example)

**Step 8:** Follow the steps in Chapter 5, “Edit and Review a Cart”.

---

**Figure 11.4**

The screenshot shows a user interface for managing account strings. The interface includes options to select different account strings, fill in the split amount or percent, and select the appropriate Cost Center for each account string. The interface also includes a section to add or remove splits and a button to save changes. The text box indicates that you have completed the required information in this step and provides instructions to proceed to the next step: Object Code. Go straight to the end: Final Review.
Chapter 12. Standing Orders (Single or Multi-Year)

Step 1: Follow the instructions in Chapter 1 “Logging in and Selecting Accounts”.
Step 2: From the eBuy “home/shop” screen, click on the “Standing Order Request” link in the Showcased Services section. (See Figure 12.1) A blank Standing Order Details screen will display. (See Figure 12.2)
Chapter 12. Standing Orders (Single or Multi-Year) (Continued)

**Step 3:** Complete the following fields: Complete the following fields: Product Description, Single or Multi year, Total Cost, Commodity Code, Health and Safety, Beginning and Ending Time Period, Number of Years, Encumbrance amount for each Fiscal Year, Department Name, Standing Order being replaced, Authorized Users, and Supplier. When completed, click the yellow “Go” button. (See Figure 12.3) The Standing Order form will display as a line in a shopping cart. (See Figure 12.4 on the next page) 

Note: Please refer to the Standing Order Preparation letter issued by Purchasing Services 3-4 Months prior to the start of the new fiscal year.

Figure 12.3
Chapter 12. Standing Orders (Single or Multi-Year) (Continued)

Figure 12.4 below illustrates a completed Standing Order Request form.
Chapter 12. Standing Orders (Single or Multi-Year) (Continued)

Figure 12.5 illustrates a cart containing a Standing Order form. Note: To review Standing Order information after the form is saved to a cart, simply click the “more info…” link at the end of the Product Description.

Step 4: Follow the steps in Chapter 5 to complete the “Edit and Review”.
Chapter 13. Attaching documents (e.g. Sole Source Justification, Quote, Specifications, etc.)

**Step 1:** Follow the instructions for creating a cart. During the “Edit & Review” step of the process, click on “add attachment...” in the Internal Notes and Attachments section. (See Figure 13.1)
Chapter 13. Attaching documents (e.g. Sole Source Justification, Quote, Specifications, etc.) (Continued)

Step 2: Browse, Type, or Cut and Paste the file containing the attachment (in this case...Sole Source Justification) and click the yellow “Save” button. (See Figure 13.2) Note: The file name displays in the Internal Notes and Attachments section. (See Figure 13.3) Add additional attachments if necessary (e.g. Supplier Quote, Specifications, Software License, Property & Inventory form, Contract, Web Link, etc.)

Step 3: Finish the Edit and Review step and Submit the order.
Step 1: From the eBuy “home/shop” page, click on the “Trade In” link in the Showcased Services section. (See Figure 14.1)
Step 2: Complete the following fields: Catalog Number\(^1\), Quantity\(^2\), Packaging\(^3\), Product Description\(^4\), Property Inventory Tag Number\(^5\), Brief description of Trad-in\(^6\), Original Cost\(^7\), Trade-in Value\(^8\), Net Cost\(^9\), Supplier\(^{10}\), Commodity Code\(^{11}\), and include any additional notes\(^{12}\). When completed, click the yellow “Go” button\(^{13}\). (See Figure 14.2) The Trade-in form will display as a line in a shopping cart.
Chapter 14. Ordering Products that include a Trade-In (Continued)

**Figure 14.3** is an example of a completed Trade In form.
Chapter 14. Ordering Products that include a Trade-In (Continued)

**Figure 14.4** displays the shopping cart containing the Trade-In form as a Line Item.

**Step 3:** Follow the steps in Chapter 5 to complete the “Edit and Review”.

[Image of a shopping cart with a Trade-In form as a Line Item]
Instructions for the Penn State Account Reviewer (A or B)

Chapter 15. How do I approve a requisition

Step 1: From the eBuy Home Page, select “>> eBuy Account Reviewers” link (See Figure 15.1)
Chapter 15. How do I approve a requisition (Continued)

Step 2: From the “home/shop” page, click on the “approvals” tab¹. (See Figure 15.2)
Step 3: Scroll/Search for unassigned² requisitions in the shared folder³. (See Figure 15.3)
Step 4: To review and possibly edit, click the “Assign” link⁴ which places the requisition in your “My PR Approvals” folder⁵. (See Figure 15.3) Note: In Figure 15.4 (next page) the requisition in the shared folder changed from “Not Assigned” to “Assigned” and now shows the name of the person to whom it’s assigned⁶.

Figure 15.2

Figure 15.3
Chapter 15. How do I approve a requisition? (Continued)

**Step 5:** Click on your “My PR Approvals” folder to expand the folder and then click on the requisition number (or the word “view”) to display the contents of the requisition. (See **Figure 15.4**)

![Figure 15.4](image-url)
Chapter 15. How do I approve a requisition (Continued)

Step 6: Review requisition for accuracy. Remember to scroll down to examine the “Supplier/Line Item Details”. Edit any/all available sections including adding to Internal/External Notes and Attachments as necessary. Send to the next step in the approval path by selecting “Complete Action” from the drop box in the upper right corner and then click the yellow “Go” button. (See Figure 15.5)

Note: Line Item additions and/or deletions are only permitted at the Account Reviewer step. Approver’s (e.g. Budget Assistants through Financial Officers) are only permitted to “Complete” or “Reject” requisitions. “NO CHANGES” can be made!
Chapter 16. How do I Reject a Single Line/Entire Requisition

Step 1: From the eBuy+ Home Page, select “eBuy Account Reviewers” link (See Figure 16.1)
Chapter 16. How do I Reject a Single Line/Entire Requisition (Continued)

Step 2: From the “home/shop” page, click on the “approvals” tab\(^1\). (See Figure 16.2)

Step 3: Scroll/Search for unassigned\(^2\) requisitions in the “Account Reviewer A” shared folder\(^3\). (See Figure 16.3)

Step 4: To review and possibly edit, click the “Assign” link\(^4\) which places the requisition in your “My PR Approvals” folder\(^5\). (See Figure 6.3) Note: In Figure 16.4 (next page) the requisition in the shared folder changed from “Not Assigned” to “Assigned” and now shows the name of the person to whom it’s assigned\(^6\).
Chapter 16. How do I Reject a Single Line/Entire Requisition (Continued)

Step 5: Click on your “My PR Approvals” folder\(^1\) to expand the folder and then click on the requisition number (or the word “view”)\(^2\) to display the contents of the requisition. (See Figure 16.4)
Chapter 16. How do I Reject a Single Line/Entire Requisition (Continued)

(First we will cover rejecting a single line.)

Step 6: To Reject a single line, scroll down to the “Supplier/Line Item Details” and click inside the check box (just to the right of the Extended Price) for the item(s) you wish to reject. The action in the drop box should read “Reject Selected Items”. To complete, click the yellow “Go” button. (See Figure 16.5)
Chapter 16. How do I Reject a Single Line/Entire Requisition (Continued)

Step 7: Clicking the “Go” button will open an overlay box giving the Account Reviewer an opportunity to document a “Reason” for the rejected line(s). (See Figure 16.6)

Step 8: Click on the “Reject Line Item” button to finalize. (See Figure 16.6) Note: the overlay box will close and a “Pending Rejected Line Item” icon will display to the left of the Product Description (two blue circling arrows and a red x). (See Figure 16.7 on the next page.)
Chapter 16. How do I Reject a Single Line/Entire Requisition (Continued)

Step 9: Scroll back up to the top right and click the yellow “Go” button to “Complete Action”\(^1\). (See Figure 16.8) **Note:** This action will send Line 1 and Line 2 on to the next workflow step. The “Pending Deleted Line Item” icon on Line 3 will display differently for the next person in workflow.

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**Figure 16.7**

![Original "Pending Line Item" icon](image1)

**Figure 16.8**

![New "Pending Rejected Line Item" icon](image2)
Chapter 16. How do I Reject a Single Line/Entire Requisition (Continued)

Figure 16.9 illustrates what the icon for Line 3 will look like to the person performing the next workflow step. Note: A large red X icon\(^1\) indicates the Line(s) are no longer “Pending” but instead have been “Rejected”. If the Shopper has the correct email notification turned on in their User Profile, he or she will get a rejected line email notification. Also note: The Supplier subtotal\(^2\) no longer includes Line 3’s Extended Price.

---

**Figure 16.9**

<table>
<thead>
<tr>
<th>Supplier / Line Item Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Product Description</strong></td>
</tr>
<tr>
<td><strong>Catalog No</strong></td>
</tr>
<tr>
<td><strong>Size / Packaging</strong></td>
</tr>
<tr>
<td><strong>Unit Price</strong></td>
</tr>
<tr>
<td><strong>Quantity</strong></td>
</tr>
<tr>
<td><strong>Ext. Price</strong></td>
</tr>
<tr>
<td><strong>Supplier Subtotal</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Catalog No</th>
<th>Size / Packaging</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Ext. Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>PYREX® Griffin Low Form 150ml Beaker, Graduated</td>
<td>1000-150</td>
<td>48/CS</td>
<td>76.68</td>
<td>150 CS</td>
<td>11,302.00 USD</td>
</tr>
<tr>
<td>2</td>
<td>PYREX® Griffin Low Form 1500ml Beaker, Double Scale, Graduated</td>
<td>1000-1XL</td>
<td>16/CS</td>
<td>87.30</td>
<td>200 CS</td>
<td>17,460.00 USD</td>
</tr>
<tr>
<td>3</td>
<td>PYREX® Griffin Low Form 3L Beaker, Double Scale, Graduated</td>
<td>1000-3L</td>
<td>6/CS</td>
<td>104.48</td>
<td>50 CS</td>
<td>5,224.00 USD</td>
</tr>
<tr>
<td></td>
<td>Supplier Subtotal</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>28,952.00 USD</td>
</tr>
</tbody>
</table>

\(^1\) A large red X icon indicates the Line(s) are no longer “Pending” but instead have been “Rejected”.

\(^2\) The Supplier subtotal no longer includes Line 3’s Extended Price.
Step 10: Follow the same steps mentioned earlier in this chapter to locate, assign, and view a requisition. Note: This time we will be assigning the requisition from the “Account Reviewer B” shared folder. Remember, we completed Account Reviewer A.

Step 11: In order for us to reject the entire requisition, we must first reject all of the lines. We do that (similar to what we did earlier) this time by clicking the check box at the top of the column. This action checks all of the remaining lines. (See Figure 16.10)

Step 11: Click the yellow “Go” button to convert Lines 1 and 2 to “Pending Rejected Line Item”(s). You’ll have another opportunity to add a note. (Same as Figure 16.6)
Chapter 16. How do I Reject a Single Line/Entire Requisition (Continued)

Step 12: Scroll back to the top and click the yellow “Go” button\(^1\) next to the “Complete Action”. (See Figure 16.11) Note: This time, since all of the lines are either Rejected or are Pending Rejected, the Complete Action step will reject the entire PR...ending it’s travel along the workflow path.
Chapter 16. How do I Reject a Single Line/Entire Requisition (Continued)

Figure 16.12 Note the Rejected icon. This time the Rejected Icon is displaying the status of the requisition.
Instructions for the Penn State Account Reviewer (A or B)

Chapter 17. How do I add products to a requisition

Step 1: From the eBuy Home Page, select “eBuy Account Reviewers” link (See Figure 17.1)
Chapter 17. How do I add products to a requisition (Continued)

Step 2: From the “home/shop” page, click on the “approvals” tab\(^1\). (See Figure 17.2)

Step 3: Scroll/Search for unassigned\(^2\) requisitions in the “Account Reviewer A” shared folder\(^3\). (See Figure 17.3)

Step 4: To review and possibly edit, click the “Assign” link\(^4\) which places the requisition in your “My PR Approvals” folder\(^5\). (See Figure 6.3) Note: In Figure 17.5 (next page) the requisition in the shared folder changed from “Not Assigned” to “Assigned” and now shows the name of the person to whom it’s assigned\(^6\).
Chapter 17. How do I add products to a requisition (Continued)

Step 5: Click on your “My PR Approvals” folder\(^1\) to expand the folder and then click on the requisition number (or the word “view”)\(^2\) to display the contents of the requisition. (See Figure 17.4)
Note: You can see that this is your requisition when you see your name\(^3\) (See Figure 17.5)
Chapter 17. How do I add products to a requisition (Continued)

**Step 6**: To Add a product line, scroll down to the “Supplier/Line Item Details” and click “Add non-catalog item for this supplier…”

**Step 7**: Complete “Add Non-Catalog Item form”. *Note: The additional items must be purchased from the same supplier.*
Chapter 17. How do I add products to a requisition (Continued)

Step 8: After completing the form (See Figure 17.7) click the yellow “Save and Close” button\textsuperscript{1}.

Figure 17.7
Figure 7.8 illustrates the Supplier/Line Item Details section after the line is added. (Compare with Figure 17.6)
Chapter 17. How do I add products to a requisition (Continued)

Step 9: Scroll back up to the top right and click the yellow “Go” button to “Complete Action”\(^1\). (See Figure 17.9)

Note: Most Punchout Suppliers do not allow more than one browser session per shopping cart. Attempting to add products at the Account Review step will cause an error message. Reminder: See Caution note in Chapter 4 regarding mixing Catalog and Non-Catalog items in a single cart.

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\(1\) See Chapter 17.9

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Chapter 18. How do I approve a requisition

Step 1: From the eBuy Home Page, select “>> eBuy Approvers” (See Figure 18.1)
Chapter 18. How do I approve a requisition (Continued)

Step 2: From the “home/shop” screen, click the “approvals” tab. (See Figure 18.2)
Chapter 18. How do I approve a requisition (Continued)

Step 3: Locate the requisition you wish to Review/Approve from your Shared folder(s) (See Figure 18.3 for three examples) or from your “My PR Approvals” folder. (See Figure 18.4) Note: If someone forwards a requisition to you, it automatically goes to your “My PR Approvals” folder.
Chapter 18. How do I approve a requisition (Continued)

Step 4: Approving requisitions can be performed from the Shared folder or from the My PR Approvals folder. Review each requisition and then select one (or several) for the “Complete Action” step. (See Figure 18.5) Note: Figure 18.5 is a combination of two different screen captures. The dotted red line separates the two.

Step 5: Click the yellow “Go” button after selecting “Complete Action” from the drop box and the selected requisition(s) move on to the next step in the approval process.

Figure 18.5
Chapter 19. How do I reject a requisition

Reminder: No Partial Rejections...No Partial Approvals. A requisition that has made it through the approval path to any one of the approvers listed above, must be rejected or approved in its entirety.

Step 1: From the eBuy+ Home Page, select “>> eBuy Approvers” (See Figure 19.1)
Chapter 19. How do I reject a requisition (Continued)

Step 2: From the “home/shop” screen, click the “approvals” tab. (See Figure 19.2)
Chapter 19. How do I reject a requisition (Continued)

**Step 3:** Locate the requisition you wish to Review/Approve from your Shared folder(s) (See Figure 19.3 for three examples) or from your “My PR Approvals” folder. (See Figure 19.4) **Note:** If someone forwards a requisition to you, it automatically goes to your “My PR Approvals” folder.
Chapter 19. How do I reject a requisition (Continued)

**Step 4:** If the requisition you intend to reject is located in a Shared Folder, click the assign link. This will place the requisition in your “My PR Approvals” folder.

**Step 5:** After locating and viewing the requisition in your “My PR Approvals” folder, scroll down to the “Supplier/Line Item Details” section and select all of the products in the requisition. (See Figure 19.5) **Note:** The checkbox at the top of the column of boxes will select all.
Chapter 19. How do I reject a requisition (Continued)

Step 6: After selecting all of the products (See Figure 19.6), click the yellow “Go” button. This will set each of the products as a “Pending Rejected Line Item”...giving you the opportunity to “Un-reject” if you rejected by accident. **Note: You will have an opportunity to add a note or reason for the rejection.**

Figure 19.7 illustrates the slight change in the icon to the left of each of the product descriptions.
Step 7: To finalize rejecting the requisition, scroll to the top and with “Complete Action” displaying in the drop box, click the yellow “Go” button. (See Figure 19.8) This step will end this requisition’s progress through departmental approvals. If the correct email notification is checked in the user’s profile, they will receive an email alerting them to the rejected requisition. The email will contain the note/reason added back in Step 6.
Chapter 19. How do I reject a requisition (Continued)

Figure 19.9 illustrates the location and selection of email notification preferences. A check would indicate your preference to receive email notification(s).