

WHAT ARE CATALOG ORDERS?

Catalogs allow suppliers to provide their product lines directly to i-Buy NYU. You can use the “Shop at the Top” search bar to immediately add items to your cart.

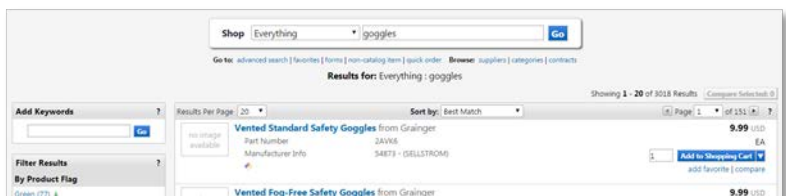


LET'S GET STARTED

1. Login to i-Buy NYU via the Work tab of **NYUHome** using your Net ID and Password.
2. From the i-Buy NYU home page, enter a product description, catalog number or generic search term in the **Shop** search bar and click **Go**.



3. Your search should return several results, and you can refine the search further based on **Product Flag, Supplier, Category, Manufacturer**, etc. *Please note: some punchout suppliers will appear in the catalog search results as well.*



4. Click **Order from Supplier**, enter the quantity, and add it to your cart. Continue to shop and add items to your cart as necessary.



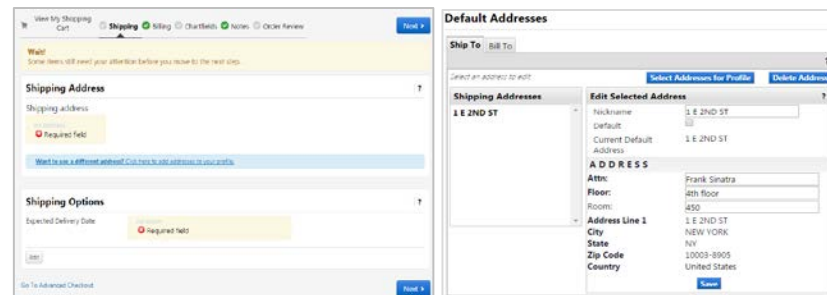
5. When you're ready to checkout, click the cart icon located in the top right and then **View My Shopping Cart**. If you need to make changes, you can adjust the quantity, but not the price.

CHECKOUT PROCESS

1. Once the shopping cart information is accurate, click **View Draft** to begin the checkout process.



2. The system will then walk you through a 5-step validation process.
3. Upon your initial requisition effort, you will be prompted to add a shipping address to your profile. If your shipping address has already been defaulted, proceed to Step 5 by clicking Next. If not, click **Want to use a different address? Click here to add addresses to your profile**. Then click **Select Addresses for Profile** and search the directory using either the building name or street number.
3. Once you have selected the desired address, add your **Floor** and **Room** and click **Save**. This will ensure future order requests automatically default your preferred shipping address information. Note: you will retain the ability to change the shipping information as needed.



4. Within the Requisition Summary tab, scroll down to the Chartfields section and click **edit** to enter chartfield values.



- Your chartfield values may contain Fund, Department, Program, Project and Budget Year. Upon submission of the requisition, the chartfield you have provided will be validated against FAME accounting information to ensure a valid chartfield string and availability of funds. If known, chartfield values can be entered directly into each field, however, clicking the “Select” button allows for the selection from a list of all NYU chartfield values. Once the values have been entered, click Save and Next.
- The **Notes** section is divided into two fields to allow you to include NYU specific notes to future reviewers (e.g. Department Approvers, Procurement, Accounts Payable) via the **Internal Notes** OR supplier specific notes as part of the PO document via **External Notes**. Click **Edit**, to add relevant notes to the applicable area and then **Save changes**. Proceed to the final step by clicking **Next**.

Internal Notes and Attachments		External Notes and Attachments	
Internal Note	no note	edit	Note to all Suppliers
Internal Attachments			Attachments for all suppliers
			Add Attachments
Handling Code	no value		Expected Delivery Date
Payment Message	no value		
Separate Payment	x		

[View/edit by line item...](#)

- Order Review offers the user a final summary review prior to submitting the order for processing. If any of the previous validation steps have not been completed, the user will not be able to proceed. Otherwise, you can click **Place Order**.
- After clicking **Place Order**, you should be presented with a Confirmation screen that summarizes your request and identifies your requisition number. You have the ability to observe the requisition's approval status among several other search options as noted below.

Requisition Submitted

Next Steps

- View Approval Status
- Search for another item
- View order history
- Check the status of an order
- Return to your home page
- Create new draft cart

Requisition Summary

Requisition number: 1508127 [Quick view](#)

Requisition status: Pending

Shopping Cart name: 2016-02-08 mgleason 01

Requisition date: 2/8/2016

Requisition total: 750.00 USD

Number of line items: 1

ASSIGNING A SHOPPING CART

- The Shopper role does not possess the ability to “Place an order”. As a result, Shopper’s MUST assign shopping carts to a known department requestor. Not sure who your department’s requestor is? [Use the Requestor Look-up Tool](#).
- Assigning a cart can also be utilized to aggregate multiple items for different users, while still consolidating the request to one order.
- Clicking the **Assign Shopping Cart** button during the checkout process allows the user to search the NYU directory for their Requestor, add them to their profile to expedite future efforts, and add a note to the assignee which will be delivered to their email via a system notification. Once the requisition has been approved, the Procurement team will review and process further.

Assign Shopping Cart

Selected Assignee: Requestors Requestors

Assign Shopping Cart To: [Search for an assignee](#)

Add to Profile

Note To Assignee:

Please add my grant account to this purchase and place the order on my behalf. Thank you!

[Assign](#) [Close](#)

- To view the status of the requisition, use the Document Search or Quick Search feature to access the requisition and click on the **PR Approvals** tab.

Orders and Documents

[Document Search](#) | [Document Search](#)

[Approvals](#) | [Search Documents](#)

Requisition | **PR Approvals** | Comments | Attachments | History

Submitted NYU Requestor 6/7/2016 2:51 PM

Purchase Req Validation 1

Completed ✓

Level 5

Bypassed

Level 4

Bypassed

Procurement Buyer Approval

Approved ✓

Michael Gleason

Purchase Req Validation 2

Completed ✓

Create PO

Completed ✓