



**NYU**

INSTITUTE FOR THE STUDY  
OF THE ANCIENT WORLD

# i-Buy NYU Training

June 27, 2016





## Welcome to i-Buy NYU User Training!

- **Course Overview & Objectives**
- **Overview of Roles**
- **Key Concepts**
  - **Part 1:** Navigating the home screen & profiles settings
  - **Part 2:** Supplier management
  - **Part 3:** Understanding forms & submitting orders
  - **Part 4:** Approvals & Receipts
  - **Part 5:** All Other System Functions
- **Knowledge Checkpoint**
- **Course Summary**



# Course Overview



**By the end of this course, you should be able to:**

- ☐ Recognize the benefits of **i-Buy NYU** for you and the University
- ☐ Navigate through **i-Buy NYU**
- ☐ Understand how you will use **i-Buy NYU** in your day to day activities
- ☐ Perform common tasks and activities in **i-Buy NYU**
- ☐ Understand where to ask questions and get support for **i-Buy NYU**



## ***What is NEW in i-Buy NYU?***

- Paper-based payment forms (Business Payment Form BUS5000 & Payment to Individuals Form IND40000) are going away
- All Procurement activity will be done via i-Buy NYU. The eReq and Flexteks systems will be retired and read-only.
- Online Supplier Requests
- More visibility to look up status of payments, invoices, Reqs, POs
- Acknowledgement of receipt required for purchases exceeding \$2500 (with exceptions)



# Understanding the System

## Payment systems that will not change:

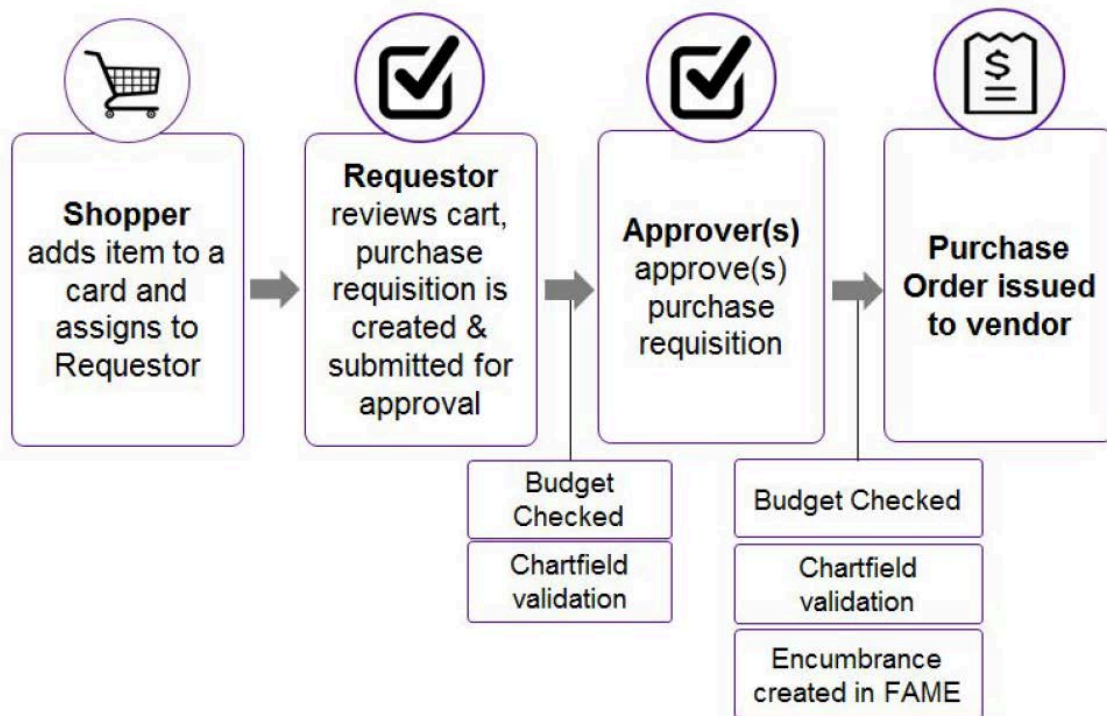
- **AP Workflow**
- **Purchasing Card/CTA**
- **Student Expense Reimbursement form**

I used to...	Order <b>books and periodicals</b> through eReq	With i-Buy NYU, I will...	Use a <b>purchasing card</b>
	Pay a <b>subawardee</b> through Flextecs		Use the <b>i-Buy NYU Subaward Form</b>
	Order <b>catering</b> through eReq		Use the <b>i-Buy NYU Catering Form</b>
	Pay <b>royalties or licenses</b> using a Business Payment Form		Use the <b>i-Buy NYU Royalties/Licenses Payment Request Form</b>
	Pay for a <b>speaker</b> using a Business Payment Form		Use the <b>i-Buy NYU Honoraria/Limited Engagement Payment Request Form</b>
	Pay <b>actors or other entertainers</b> using a Business Payment Form		Use the <b>i-Buy NYU Honoraria/Limited Engagement Payment Request Form</b>
	Order <b>venues/events</b> through eReq		Use the <b>i-Buy NYU Venues/Events Form</b>
	<b>Reimburse travel or expenses</b> for a guest using a Payment to Individuals Form		Use the <b>i-Buy NYU Guest Travel/Reimbursable Expenses Payment Form</b>



# Understanding the System

## PO Issuance Process







# Overview of Roles





# Overview of Roles



Shopper

- Shops for items using enabled suppliers, forms, or Non-Catalog requests
- Assigns draft carts to Requestor for order placement
- Issue receipt, if necessary.



Requestor

- Shops for items using enabled suppliers, forms, or Non-Catalog requests.
- Submits assigned carts to workflow for approval and order placement
- Issue receipt, if necessary.



Advanced  
Requestor

- Shops for items using enabled suppliers, forms, or Non-Catalog requests.
- Submits assigned carts to workflow for approval and order placement
- Issue receipt, if necessary.
- Bypass approvals for orders under \$2,500 (exceptions apply)



Approver

- Reviews & Approves appropriate requisitions
- Returns or Rejects non-compliant or incorrect requisitions



Match  
Exception  
Approver

- Reviews & Approves invoices that create a match exception (3-way tolerance 10% or \$100, whichever is less)
- Escalates supplier errors for resolution



# Overview of Roles

## The Shopper



Selects Items  
and adds  
them to a  
shopping cart



Assigns a cart to  
a **Requestor**  
within their  
school/dept for  
review



Can acknowledge  
receipt of  
goods/services

**Note:** All University employees will have the role of **Shopper**.  
**Shopper** cannot submit an order.

## The Requestor



Reviews shopping  
carts assigned to  
them by a  
**Shopper** in their  
school/dept\*



Submits carts for  
approval



Acknowledges  
receipt of  
goods/services

\***Requestor** will receive an email when a shopping cart has been  
assigned to them



# Key Concepts in i-Buy NYU




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**Key Concepts**

# **Part 1: Navigating the Home Screen & Profile Settings**



**NYU**

Preferences | Channels | Ask NYU IT | **Log Out** (jcr388)



NYU Home

Email Splashes

HomeAcademics**Work**AlumniResearchNewsFilesNYU Life

**Administrative Systems**

Scroll down to access links to a variety of administrative services, including Tuition Remission.

**Updates/Alerts**

- UDW+ is no longer available through the Administrative Portal. You must access UDW+ by downloading the UDW+ Client to your desktop. The UDW+ Client Download, with links and directions, is located in the Additional Services list below.
- Chrome, Firefox, Safari, or Internet Explorer are the recommended web browsers to log in above
- View current IT service status notices
- Sign up for IT service status email alerts
- Workflow is available seven days a week

**Additional Services**

- AP Workflow
- BIA/BudMod (Budget Modification System)
- Budget Modification (BIA/BudMod) Request Form
- Chartfield Access Authorization Form
- Conflict of Interest
- Delegation of Authority
- ePayments - Payment Gateway
- Financial Plan (Hyperion) Request Form
- Interactive Reporting (Brio) (Requires Internet Explorer 8+)
- IT Controls
- JEMS (Journal Entry Management System)
- ModTrak
- Pass History

**PeopleSync: Manage your HR and Payroll Information**

PeopleSync provides NYU employees with a new way to access and manage HR and Payroll information and transactions.

All NYU employees and faculty can use PeopleSync to:

- Update home, work, demographic and emergency contact information
- View pay slips
- Manage direct deposit
- Elect and manage retirement benefits
- Provide consent for and access 2014 Form W-2

To access PeopleSync on your desktop or mobile device, please use the latest version of Firefox or Chrome. For more information on how to use PeopleSync, please visit <http://www.nyu.edu/peoplesync>.

PeopleSync Login

**Buying and Paying**

- i-Buy NYU**
- Buying and Paying on FinanceLink
- e-Req (View Only)
- NYU Traveler
- Asset Management Surplus Website

**Benefits Resource Center**

NYU's Benefits Resource Center: Your web resource for health and welfare benefits information.

Benefits Resource Center Login

**Updates/Alerts**

- "Internal Server Error" Affecting Login to the Benefits Resource Center: If you get an error message, please try clicking the refresh button at the top of your browser window. ITS is currently investigating the problem.



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# i-Buy NYU Navigation

- Home Shop →
- Orders & Documents →
- Catalogs & Contracts →
- Accounts Payable →
- Supplier Management →
- Reporting →
- Site Administration →

**NYU Procurement**

Shop > Shopping > Shopping Home > Home/Shop

Shop Everything

Go to: [advanced search](#) | [favorites](#) | [forms](#) | [non-catalog item](#) Browse: [suppliers](#) | [categories](#) | [contracts](#)

**Welcome to i-Buy NYU!**

**i-Buy NYU Tip of the Day**  
Did you know that you can create **your very own i-Buy NYU dashboards** customized to the information most important to you. Just click on your name above and click **Dashboards** and you will be off and running!

**For the i-Buy NYU Resource Portal which contains up to date communications, training materials etc:**

- [i-Buy NYU Resource Portal](#)

**For access to i-Buy NYU Tip Sheets and Videos:**

- [i-Buy NYU Tips and Video](#)

**Need assistance on Buying and Paying methods at NYU:**

- [Buying and Paying Guide](#)

**Direct access to the following key i-Buy NYU Tip Sheets:**

- [Submitting Non-Catalog Order](#)
- [Approving a Requisition](#)
- [Commodity Codes](#)
- [Receiving Goods and Services](#)
- [Requesting Change Orders](#)

**Direct access to the most popular i-Buy NYU Videos:**

- [Submitting Non-Catalog Order](#)
- [Approving a Requisition](#)
- [Receiving Goods and Services](#)
- [Change Orders](#)

**For lookup requestors:**

**Non-Catalog Item**

**Your profile** **Action Items** **Notifications** **Logout**

**Punch Outs**

**Office Supplies / Office Equipment/Novelty**

empire office Herman Miller STAPLES

**Facilities**

Accredited Lock Supply BEST 50 ACE Industrial Controls HARVEY KALOS MICHAELS

**Technology**

ANIXTER B&H BEST BUY CDWG DELL GrayConnection COMPUTER PRODUCTS

**Books**

bookstores

**Dental**





- **Selecting a Default Ship To Address**
- **Selecting Default Chartfield Favorites**
- **Managing Notifications**

**Frank Sinatra**

User Name mgleaseon

User Profile and Preferences >

Update Security Settings >

Default User Settings ▾

Custom Field and Accounting Code Defaults

**Default Addresses**

Shopping Cart Assignees

Checkout Settings

User Roles and Access >

Ordering and Approval Settings >

Permission Settings >

**Notification Preferences >**

User History >

Administrative Tasks >

Default Addresses

Ship To Bill To

Select an address to edit

Select Addresses for Profile Delete Address

Shipping Addresses

110 E 14TH ST

Edit Selected Address

Nickname 110 E 14TH ST

Default ☒

Current Default Address 110 E 14TH ST

ADDRESS

Attn: Frank Sinatra

Floor: 4th Floor

Room: 1234

Address Line 1 110 E 14TH ST

City NEW YORK

State NY

Zip Code 10003-4170

Country United States

Save





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# i-Buy NYU Navigation

NYU Procurement

Shop > Shopping > Shopping Home > Home/Shop

Search (Alt+Q) 0.00 USD Logout

**Promotional**

Inkwell JN

**Printing**

NYU REPROGRAPHICS

**Catering**

Aramark Top of the Square

**Miscellaneous**

American Education Supplies

**Order Forms**

Bid Waiver Order Catering Change Order Standing Order Subaward Venue/Events

**Payment Request Forms**

Guest Travel / Reimbursable Expe... Honoraria / Limited Engagement Memberships Non-NYU Prizes / Awards Royalties / Licensing Taxes

Legal

Order Forms →

Payment Request Forms →

\*Scroll Down





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Key Concepts

## Part 2: Supplier Management





# Searching for Suppliers

- Suppliers must be setup prior to submitting a cart requisition. Please ensure you allow sufficient time for supplier onboarding to occur. This applies to all order types, including Forms. 30 days is recommended.
- If the supplier does not appear within the search results you will need to submit a **New Supplier Request**

## Example 1: Search for Supplier “Supplier A” in Supplier Management

Supplier Management > Manage Suppliers > Search for a Supplier > Suppliers

[Back to Search](#) [Start Over](#) Showing 1 - 4 of 4 Results

Results Per Page: 200

**Search Details**

**Filtered By**  
Search Terms: olympus [Save New Search](#)

**Refine Supplier Search** ?

**Profile Last Updated By Supplier**  
▼

**Last Invitation Date**  
▼

**Registration Status**  
None (4)

**Shopping/AP Status**  
Active (1)  
Inactive (3)

**Network**  
In Network (1)  
Out of Network (3)

**Type**  
Non-Catalog (4)

**Country Of Origin**  
United States (1)

**Results:**

- Olympus**  
Registration Status: None
- OLYMPUS AMERICA INC**  
NYU Supplier ID: 000064477  
Registration Status: None
- Olympus America Inc.**  
Registration Status: None
- Olympus America, Medical**  
Registration Status: None

**Legend**

- In Network Supplier
- Non-Catalog Enabled
- Science Catalog Supplier
- Hosted Catalog Supplier
- Punchout Supplier



# New Supplier Requests

- Complete brief supplier questionnaire
- Your request will be routed to the Supplier Onboarding Team in Procurement for their review. If they approve the request, you will receive an email notification.
- The Supplier Onboarding Team will then send an email to the new supplier inviting them to register as an NYU supplier in i-Buy NYU.
- Once the supplier completes their registration in i-Buy NYU, you will receive an email notification.

*\*Note: W-9, W-8 and/or other IRS forms are not required to submit a new supplier request.*

Supplier Management > Requests > Manage Supplier Requests > Questions - Company Overview

< Back to Manage Supplier Requests

XYZ Consulting LLC

Template: New Supplier Request  
Request Status: Incomplete

Instructions

Questions: ✓

Review and Complete

Supplier Request Workflow

### Questions - Company Overview

Print Request | History | ?

On This Page  
Request Information (3)  
Potential Supplier Overview (8)

#### Request Information

What type of supplier is this? \*

☐ Office Supplies ☐ Transportation ☐ Landscaping ☐ Individual (Professional Service) ☐ Other or Unknown

☐ Computers, Networking and IT ☐ Food and Beverage Services ☒ Consultants ☐ Scientific Supply ☐ Individual (Honorarium, Minor Service, Expense)

☐ Furniture ☐ Medical / Dental ☐ Business Services

☐ Construction

How are you familiar with this supplier? \*

I have worked with the supplier in the past.

1956 characters remaining

Why should NYU engage in business with this supplier? \*

This supplier provides a specialized skill set that does not currently exist at NYU.

1918 characters remaining

#### Potential Supplier Overview

Supplier Name (For Individuals put "Last Name, First Name") \*

XYZ Consulting LLC

Tax ID Number

DUNS Number

First Name \*

Reema

Last Name \*

Shah

Email Address \*

reema.shah@nyu.edu

Phone Number \*

800-555-5555

Attachments

No File Attached

\* Required

< Previous



# Update Existing Suppliers

- “Submit Supplier Requests” -> “**Supplier Update Request**”
- Maintenance requests including address updates, contact information changes, and name changes are subject to review by the Supplier Onboarding Team in Procurement prior to being activated in i-Buy NYU.
- Click on the **Supplier Request Workflow** at any time to view the status of your supplier request.

## Submit Supplier Requests

Select a New Supplier Request or  
Supplier Update Request \*

Supplier Update Request

Supplier name \*

ABC Consulting LLC

\* Required

Submit

Close



# Supplier Request Workflow

## Supplier Workflow





# Supplier Invoice Submission

\*Suppliers should be submitting invoices directly to the centralized system.

## Definitions:

**Centralized Invoice Receiving:** Centralized location that receives invoices via fax, email, or traditional mail, from suppliers and processed in iBuy NYU.

**Supplier Invoice:** The itemized bill for goods sold or services provided containing individual prices, the total charge and the terms.

**Submission Email:** [nyuinvoices@nyu.edu](mailto:nyuinvoices@nyu.edu)

### Option 1: E-INVOICE



INVOICE  
SUBMITTED BY  
SUPPLIER VIA  
WEB FORM OR  
CXXML



INVOICE  
RECEIVED IN  
I-BUY NYU

### Option 2: PAPER INVOICE



SUPPLIER  
SENDS  
INVOICE



INVOICE  
RECEIVED  
CENTRALLY



INVOICE  
SCANNED



INVOICE  
RECEIVED IN  
I-BUY NYU





# Supplier Post Go-Live

**In addition to self-guided and “on-demand” training materials, including Tip Sheets and Quick Videos, the Project Team will be available to support post go-live:**



**Special hotline for  
questions and  
support**



**Email questions to  
[askfinancelink@nyu.edu](mailto:askfinancelink@nyu.edu)**



**On-site visits and office  
hours**



# Part 3: Submitting Orders & Understanding Forms

▼ Order Forms ?

Bid Waiver Order

Catering

Change Order

Standing Order

Subaward

Venue/Events

▼ Payment Request Forms ?

Guest Travel /  
Reimbursable Expe...

Honoraria / Limited  
Engagement

Memberships

Non-NYU Prizes / Awards

Royalties / Licensing

Taxes

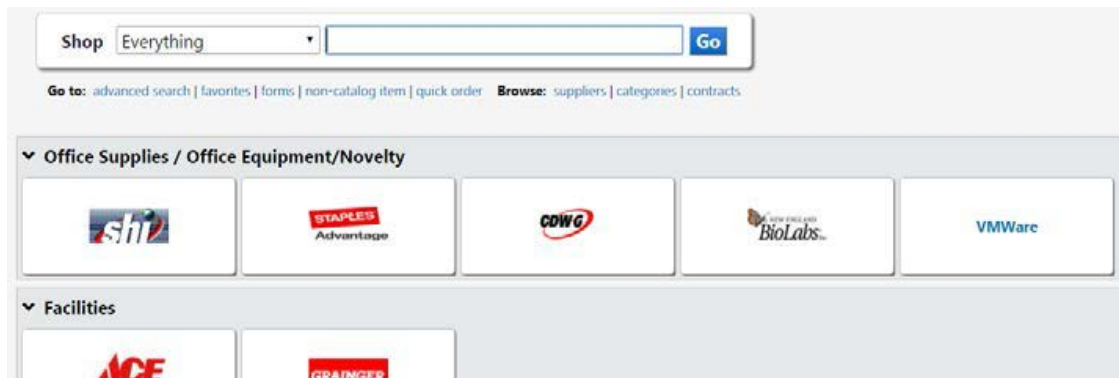
Legal



# Submitting Punchout Orders

## What are Punchout Orders?

Punchout catalogs connect to a supplier's website, but are branded for NYU and use our contract pricing.



- Very similar functionality as old i-Buy system.
- Suppliers include Staples, B&H, Grainger, etc.

Example 2: Placing a Staples order.



## 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.

A screenshot of a web search bar. On the left is a button labeled 'Shop'. Next to it is a dropdown menu currently showing 'Everything' with a downward arrow. To the right of the dropdown is a text input field. At the far right of the bar is a blue button labeled 'Go'.

Example 3: Placing a Catalog order.



# Submitting Non-Catalog Orders

## What is a NonCatalog request?

A NonCatalog request is a free form requisition that allows you to enter in product information including (description, catalog number, quantity, and price). NonCatalog requests are typically used for service related orders, or unique goods that are not available through punchout or catalog suppliers .

Shop Everything Go

Go to: advanced search | favorites | forms | **non-catalog item** | quick order Browse: suppliers | categories | contracts

### FAST FACT



Commodity Codes are a standardized set of codes to classify the procurement of goods and services at NYU and are automatically mapped to NYU's account codes. Refer to the Commodity Codes Tip Sheet for more information.

- Need to enter a good/service **Commodity Code**.
- If your non-catalog request is for goods, no action is required. If you're purchasing services from an individual or company you'll need to **Flag as Cost Matching**.

Example 4: Submitting a NonCatalog request for services based on quote from "independent contractor a"

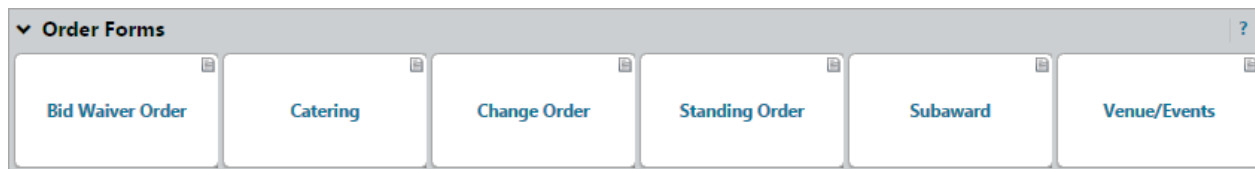


## When should I use an 'Order Form'?

Forms have been designed to simplify certain types of requests.

Available forms include:

- **Bid Waiver Order Form**
- **Catering Order Form**
- **Change Order Form**
- **Standing Order Form**
- **Subaward Form**
- **Venue/Events Form**



Each form has a description in the header (and by hovering over the form with your mouse) to define proper use.



## Definitions

- **Bid Waiver Order Form:** Used for the purchase of supplies, equipment or services not under contract requiring the expenditure of funds in excess of \$10,000.
- **Catering Order Form:** Used for all catering order requests from NYU's approved caterers. Caterers that are not approved are subject to further Procurement team review.
- **Change Order Form:** Requesting a change to an established purchase order. Changes include increases, decreases, and chartfield changes.
- **Standing Order Form:** Used as justified for repetitive, specified services or items from the same supplier over period of up to one year, or on a monthly basis.
- **Subaward Form:** Establishes subawards on sponsored projects replaces the Flextecs subaward invoice approval process.
- **Venue/Events Form:** Used for space and event-related expenditures. Requests must be submitted sufficiently in advance of the event to allow for any deposits or check requests to be processed.

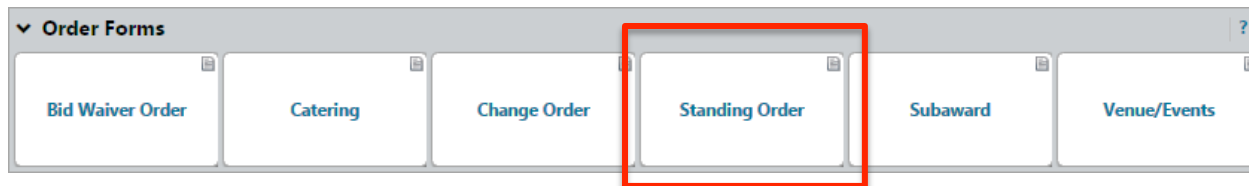




# Submitting Standing Orders

Standing Purchase Orders may be used when the University:

- Is purchasing repetitive, specified services or items, or categories of items, from the same supplier over a period of up to one year, or on a monthly basis
- Is obtaining more favorable pricing through volume commitments
- Has a contract with negotiated pricing in place with the supplier
- Standing Orders should NOT be used to manage your budget
- All Standing Order Requests are subject to Procurement Review & Approval



Notes when submitting:

- Ensure the “Flag as Cost Matching” option is checked
- Need Start Date and End Date.

Example 5: Submitting a standing order from “Supplier A”



# Grant and Non-Grant Distributions

## Notes

- Grant Funded (Funds 24/25) requests follow workflow to ensure Department Administrators and Principal Investigators are included in the review and approval process, as appropriate
- To ensure a requisition with Grant and Non-Grant funding sources is routed correctly, separate requisition lines must be established for each distribution line.
- If you are splitting a cost of one item or service between a Grant and Non-Grant Chartfield, it is recommended that you include an EXTERNAL COMMENT to the supplier that you are ordering a quantity of one only to avoid duplicate delivery of the one item.
  - **For Grant POs** (excluding subawards) **up to \$5,000**, approval will be required by Dept. Admin
  - **For Grant POs** (excluding subawards) **exceeding \$5,000**, approval will be required by both Dept. Admin and PI
  - **For all Subaward requisitions and invoices**, approval will be required by both Dept. Admin and PI, irrespective of dollar amount.



# Setting up Recurring Payments

**Recurring Payments** can be accommodated to address invoice scenarios that require a schedule of payments to be followed. The Procurement and Accounts Payable teams will evaluate each recurring payment request for validity and appropriate documentation.

**Prepayment Requests** can also be accommodated, and are subject to Procurement review to ensure optimal payment terms are achieved.

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Lease Payments	n/a	EA	4,000.00	EA	48,000.00 US\$

Commodity Code: 54111500  
Handling Code: Office Supplies > Paper  
Invoice Processing Flag: Recurring Payment Request  
Payment Instructions: Monthly Lease Payments  
Comments: Check Required on 1st of th  
Payment Message  
Separate Payment  
Internal Note: expand | clear  
Save Cancel

In Advanced Checkout:

- Click the corresponding “**edit**” for the line item that will require recurring payment accommodations.
- Select **Recurring Payment Request** from the **Invoice Processing Flag** drop down field.
- Enter **Payment Instructions** to be reviewed by the Procurement and Accounts Payable teams.
- Enter additional commentary in the **Internal Notes** section, if necessary.

Example 6: Do we want an example of this?



# Order Request Workflow

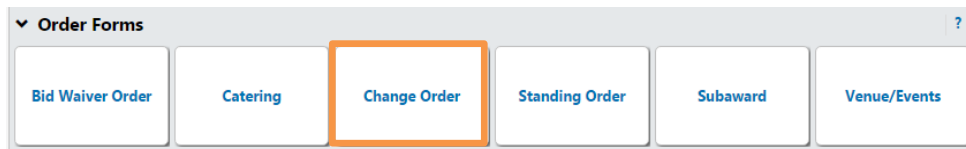
## Requisition Workflow





## 3 Kinds of Change Orders

- **Increases** consider whether or not the increase is to accommodate continued future use of the Purchase Order (PO) OR to accommodate a final invoice payment.
- **Decreases** consider whether or not there is previous invoice activity on the PO. You cannot decrease a PO or PO line below what has already been paid to supplier.
- **Chartfield Changes** consider previous invoice activity, complexity of chartfields on the original PO, and the impact of issuing a new PO. Chartfield changes can only accommodate future activity, invoice activity that has already occurred against the original chartfield must be resolved via a journal voucher.





## Scenarios where a **Change Order** should be submitted:

IF...	AND...	THEN...
Amount (PO Quantity or Price) Increases or Decreases	Order is <b>Non-Catalog</b> . Change is <b>simple</b> and Invoice activity is <b>minimal to none</b> .	Submit change order and indicate lines that will increase/decrease in price/quantity, amount and new PO total.
Chartfield changes resulting in new funding source		Submit change order and indicate lines that will change and from/to chartfield.
PO is cancelled (Note: Order must not have been invoiced against)		Submit change order and indicate "Cancel PO" as type of change.
PO line(s) are canceled or specific line is zeroed out		Submit change order and indicate lines that will decrease to zero and new PO total.
PO is closed (Note: PO must be fully encumbered to request cancellation and encumbrance release)		Submit change order and indicate "Close PO" as type of change.
General PO information is amended (Address, Ship-to address, etc)		Submit change order and indicate specific PO change.

## Scenarios where a **New Order** should be submitted:

IF...	THEN...
Change is related to Catalog or Punchout Order	Submit a new order
Complex change to multiple lines/chartfields that haven't been invoiced	Copy existing order, edit cart to reflect changes and submit new order. Cancel old order.
Chartfield changes on a partially paid PO	Change chartfield on PO for remaining balance. Submit JEMS entry for paid portion of PO.
Chartfield changes on a fully paid PO	Changes must be done via JEMS entry.



## Change Order Workflow

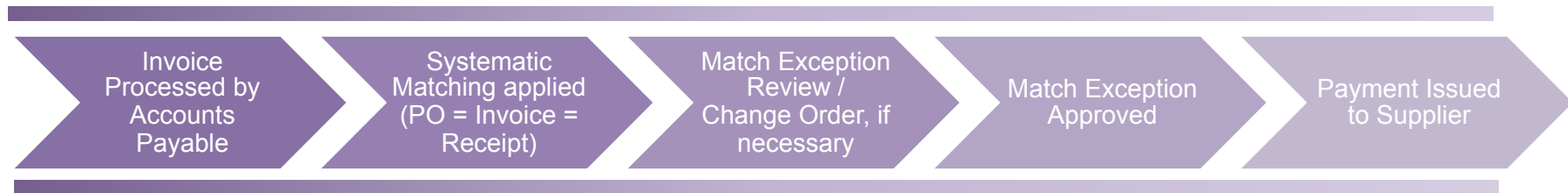






- What is a Match Exception?
- Match Exception Reviewer (Accounts Payable)
- Match Exception Approver (Level 5 Approver)

## Invoice Workflow





# Understanding I-Buy NYU Payment Request Forms

The **Payment Request Form** has been designed to address specific types of **Non PO activities**. Routing and approval of the Payment Request will follow the DOA structure and will not require offline signatures and approvals.

Available forms include:

- **\*Guest Travel/Reimbursable Expenses Form**
- **\*Honoraria/Limited Engagement Form**
- **Memberships Form**
- **Non-NYU Prizes/Awards Form**
- **Royalties/Licensing Form**
- **Taxes**
- **Legal**

A screenshot of a web interface titled "Payment Request Forms" with a dropdown arrow and a question mark icon. Below the title, there are seven buttons arranged in two rows. The top row contains six buttons: "Guest Travel / Reimbursable Expe...", "Honoraria / Limited Engagement", "Memberships", "Non-NYU Prizes / Awards", "Royalties / Licensing", and "Taxes". The bottom row contains one button labeled "Legal".

\*Commonly used at ISAW

Example 8: Guest Travel Reimbursement for "Guest A"

Example 9: Honoraria for "Speaker A"



## Definitions:

- **Guest Travel/Reimbursable Expenses Form:** To be used to reimburse out of pocket expenses incurred by guests of NYU for Meals, Travel, Lodging, Taxi/Cab Fare, and Alcohol.
- **Honoraria/Limited Engagement Form:** To be used to accommodate engagements for speaker fees and honoraria, as well as, additional expenses including Meals, Travel, Lodging, Taxi/Cab far, and Alcohol.
- **Memberships Form:** To be used to pay approved NYU membership expenses only.
- **Non-NYU Prizes/Awards Form:** To be used to pay for prizes and awards presented to non-NYU individuals.
- **Royalties/Licensing Form:** To be used to pay for royalties and licensing fees due from NYU to an individual (including NYU employees).

**NOTE:** During the checkout process, you will be required to copy and paste the commodity code provided at the checkout screen.



# Payment Request Workflow

The screenshot shows a web form titled "NYU" with a "Document" tab. The form is divided into several sections:

- Enter Supplier:** Includes a search bar, a "Supplier Search" button, a "Currency" dropdown (set to "USD"), and a link to "Submit a New Supplier Request or Supplier Update Request".
- Remit To Address:** A form with fields for Contact Name, Street 1, Street 2, Street 3, City, State, Zip, Country (dropdown), Email, Phone, Toll-Free Phone, and Fax.
- Payment Details:** Includes "Payment Type" (Membership), "Commodity Code" (941.0000), and a note: "The payment type and commodity code has been defaulted based on the selected form".
- Invoice Details:** Includes "Supplier Inv #", "Invoice Date", and "Internal Attachments (Any necessary supporting documentation)".
- Handling Code:** A dropdown menu with "Please select..." and a "Comments" text area.
- Payment Message:** A text area with a "254 characters remaining" indicator and "expand" / "clear" links.
- Secure Payment:** A checkbox.
- Unit of Measure:** A dropdown menu with "EA - Each" selected.
- Amount:** A text input field.

## Payment Request Workflow

Payment  
Request  
Submitted

Department  
Review &  
Approval

Accounts  
Payable  
Review &  
Approval

Invoice  
automatically  
approved

Payment  
Issued



## What Are Commodity Codes?

- Commodity codes are an internationally standardized system of names and numbers used to classify goods/services and are maintained by the World Customs Organization.
- In an effort to standardize how NYU categorizes purchases across all schools and divisions, the commodity code of an item has been linked to the existing FAME account structure.

Example: Purchase of 25 mouth mirrors at College of Dentistry

Item	Commodity Code	Commodity Code Description	FAME Default Account Code	FAME Default Account Code Description
Mouth Mirrors	42150000	Dental Supplies > Dental Supplies	65294	Dental Instruments



## If you are submitting...

- An order using a **Punchout supplier/catalog, Subaward Order Form or the Membership, Non-NYU Prizes/Awards, or Royalties/Licensing Payment Request Forms:**  
→ [i-Buy NYU will default the commodity code provided by the supplier.](#)
- **The Catering or Venue/Events Order Forms or the Guest Travel/Reimbursable Expenses, Honoraria/Limited Engagement, or Taxes Payment Request Forms:**  
→ [copy and paste the commodity code provided within the checkout screen.](#)
- **The Bid Waiver, Change Order, Non-Catalog or Standing Order Form:**  
→ [you will be prompted to search for and select a commodity code within the form itself.](#)

Code	Description	
30240000	Materials and Rentals > Event Equipment and Material Rentals	<a href="#">select</a>
73152105	Scientific and Laboratory Support Services > Preventive Maintenance	<a href="#">select</a>
82150000	Events Services > Entertainment	<a href="#">select</a>



Q: How do I pay an invoice that does NOT have an accompanying purchase order?

A: The invoice can be submitted with a Payment Request Form, only if it meets the criteria for acceptable use of the Payment Request (refer to the Understanding Order Forms tip sheet). Invoices that *should* have a corresponding purchase order will require a requisition to be submitted, a purchase order to be issued “after the fact” and then be processed against the after-the-fact purchase order.



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**Key Concepts**

# Part 4: Approvals & Receipts





- Approval Queue Management
- Assigning & Reviewing Requisitions
- Approving Requisitions
- Returning & Rejecting Requisitions
- Comments & Attachments
- Document History

Group Results By: **Folders**

Filtered by  
Type: Requisitions  
Date Range: All Dates  
View Approvals For: Frank Sinatra

Filter My Approvals ?  
Type: Requisitions  
Date Range: All Dates  
View Approvals For: My Approvals

Total Results Found: 90

All Dates Assign Go

Sort by: Submit date newest first

Hide requisition details expand all collapse all Results per folder: 20

**My PR Approvals [2 results]**

Requisition No.	Suppliers	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action
<a href="#">1550971</a>	Borisova, Tatiana	Frank Sinatra	4/11/2016 8:14 PM	Robert Francis Dayre	1,998.75 USD	<a href="#">Approve</a>
Requisition Name: Test 1042 payment 2016-04-11 RD114 01 No. of line items: 2 Folders: 6 Days in folder [My PR Approvals]						
<a href="#">1518150</a>	W W GRAINGER INC	Frank Sinatra	2/22/2016 4:13 PM	Bhagirath Tanna	5,225.00 USD	<a href="#">Approve</a>
Requisition Name: 2016-02-22 btanna 06 No. of line items: 1 Folders: 53 Days in folder [My PR Approvals] 84 Days in folder [Chartfield Catch All]						

**Chartfield Catch All [90 results]**



## Approving a Requisition

There are several options for navigating to your approvals:

- Option 1: Click on link to requisition within the approval notification email, which will bring you to i-Buy NYU.
- Option 2: Within the system, click Orders & Documents > Approvals > My Approvals
- Option 3: Within the system, Click Action Items > My Assigned/Unassigned Approvals

To Approve from inside view requisition in **My Approvals**: select **Approve/Complete Step** under the Available Actions menu and click Go.

New Pending Approval for Requisition# 1598803

From: <do-not-reply@nyu.edu>  
Date: Sun, Jun 19, 2016 at 7:14 PM  
Subject: New Pending Approval for Requisition# 1598803  
To: system.validation@nyu.edu

**NYU** Procurement

**53010-Level 5- Greater than \$2,500 Approval Request for Requisition# 1598803**

Dear Jeffrey Claude,

The requisition listed below has been submitted for your approval.  
Log into iBuy to take action on this requisition.

**Summary**

Folder:	53010-Level 5- Greater than \$2,500
Prepared by:	Susan Flint
TOTAL:	2,920.00 USD

**Chartfields**

Business Unit:	WS001
Fund:	10 - Operating
Department:	53010 - Financial Management

**Additional Information**

**Other Possible Approvers**

Anna Lavrik  
Susan Flint  
Tammy V. Dang

[View Requisition Approvals](#)

If you have any questions with regard to reviewing/approving this requisition, please contact your SelectSite Support Team.

Thank you,  
NYU

Available Actions:

- Approve/Complete Step
- Approve/Complete Step
- Return to Shared Folder
- Place on Hold
- Return to Requestor
- Copy to New Shopping Cart
- Add Comment
- Add Notes to History
- Reject Requisition

**Go**

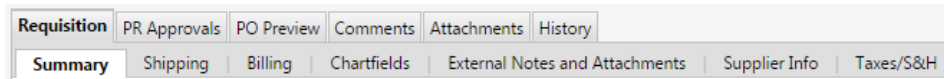
**Billing**

**Options**

**edit**

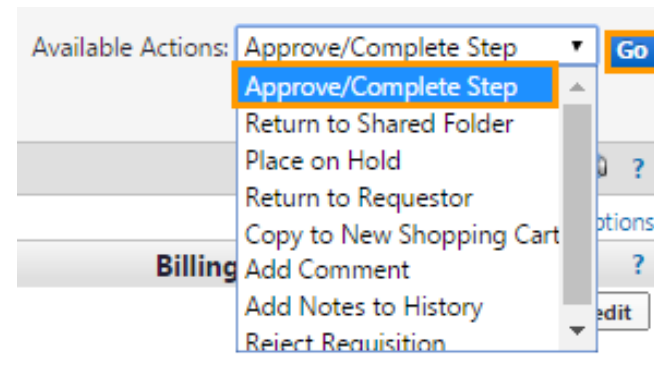


Note the following tabs within the Requisition summary screen:



- **Requisition:** Allows access to a summary view, as well as additional details specific to Shipping, Billing, Chartfields, Notes and Attachments, Supplier Information, and Taxes/Shipping & Handling.
- **PR Approvals:** Approval workflow, including current position within workflow.
- **PO Preview:** Preview of Purchase Order
- **Comments:** View and add comments. All comments are delivered to the recipient's NYU email address. The comment is time date stamped and historically recorded on this tab with the Requisition.
- **Attachments:** Attachments associated with the Requisition.
- **History:** Systematic time date stamp of every event that occurs against the Requisition.
- **Chartfield:** Allows approver to review and modify the fund, department, program and/or project assigned to a Requisition.

You may also Return or Reject a requisition.





- Who can issue a receipt?
- Receipt requirements  
Purchase Orders > \$2,500  
(exceptions apply)
- Notifications
- How to issue a receipt
- Types of receipts  
(Full, Partial, Cost,  
Quantity)

The screenshot displays a web-based receipt management system. At the top, a navigation bar includes tabs for Status, Purchase Order, Revisions, PO Approvals, Shipments, Receipts, Vouchers, Comments, Attachments (1), and History. The main content area is divided into several sections:

- General Information:** Displays PO Reference No. (IB00000748), Revision No. (0), Supplier Name (NYC Office Systems), Purchase Order Date (4/12/2016), Total (1,000.00), and Requisition Number (1551252).
- Document Status:** Shows a Pending status with a Workflow section indicating the system will distribute purchase orders using the method(s) indicated below (Manual, New Order).
- Line Item Status:** A table showing the receipt details for the selected PO line.

The **Line Item Status** table includes the following columns: Product Description, Catalog No., Size / Packaging, Unit Price, Quantity, Ext. Price, Sumline, Receipt, Invoice, and Matchline. The table shows one line item for "Insurance Claim" with a quantity of 1 and an extended price of 1,000.00.

Below the table, the **Header Information** section provides details for the receipt, including the Receipt Name (2016-05-17 mgleason 02), Receipt Create Date (5/17/2016 11:45:30 AM), Source (Manual), and Supplier Name (NYC Office Systems). The **Receipt Address** section shows the location (Attn: Frank Sinatra, Room 4th Floor, Room 1234, 110 E 14TH ST, NEW YORK, NY 10003-4170, United States) and the **DELIVERY** section shows the carrier (Other) and tracking information.

The **Receipt Lines** section displays a table with the following columns: PO No., PO Line No., Product Name, Catalog No., Qty/Cost Ordered, Previous Receipts, Cost, Line Status, and Actions. The table shows one line item for "Insurance Claim" with a quantity of 1,000.00 and a cost of 1,000.00 USD. The line status is "Cost Received".



## What Is a Receipt?

Receipts provide an acknowledgement in i-Buy NYU that the goods/services ordered have been received.

There are two kinds of receipts: **Cost Receipts**, typically used for non-catalog service orders and standing orders and **Quantity Receipts**, typically used for tangible goods.

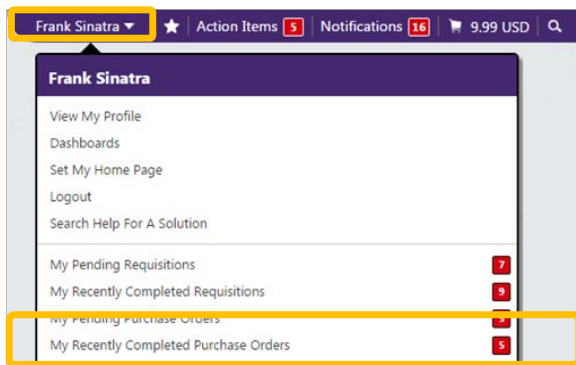
- A Receipt is required for all purchases exceeding \$2,500. Note: Receipts can be entered at the time that goods or services are received OR after an invoice has been received.
- Receiving functionality in i-Buy NYU replaces the “negative confirmation process” used with eReq.
- i-Buy NYU has been configured to alert the Requestor (via email and system notification) when a Receipt is required. Note: This notification can also be forwarded to a Shopper who can then acknowledge receipt.
- 
- Systematic reminder notifications will persist until receipt has been acknowledged in i-Buy NYU.



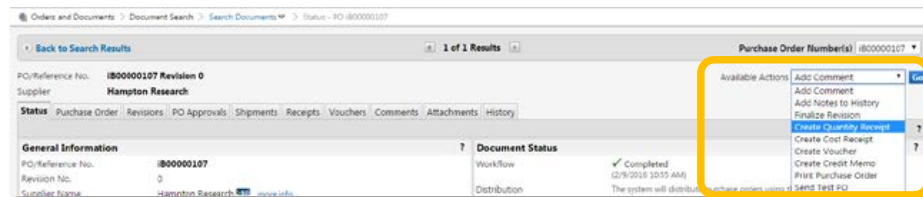
## How To Create a Receipt:

1. Find the Purchase Requisition that you have received goods/services for
2. Create the receipt within the **Available Actions**

- **Option 1:** Under your profile name, click **My Recently Completed Purchase Orders**. Click on the PO from within this list.

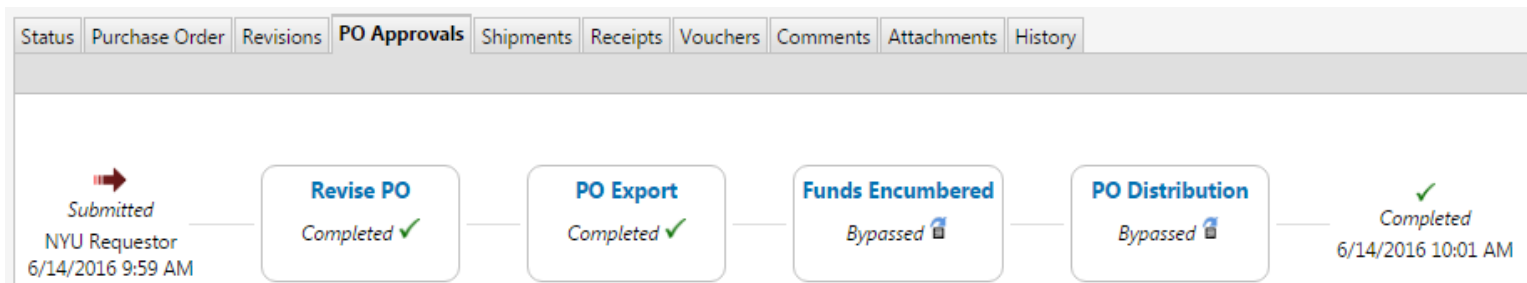


Click on the appropriate PO number. Within the **Available Actions** drop-down menu, click on **Create Quantity Receipt** or **Create Cost Receipt**.





If receipt of an invoice within i-Buy NYU triggered the creation of a receipt, the invoice will be submitted for payment in accordance with the payment terms NYU has with the supplier.





## Two and Three Way Matching

When is a receipt needed?

### Two-Way Match

- Purchase orders less than \$2,500
- No receipt is required to process a payment against a two-way match purchase order



### Three-Way Match

- Purchase orders greater than \$2,500
- Receipt is required to process a payment against a three-way match purchase order







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**Key Concepts**

# **Part 5: All Other System Functions**



# Foreign Currency Overview

- Foreign Currency per Supplier
- Requisition & Approval routing
- Daily Exchange Rate Automated
- Purchase Order / Invoice / Payment discrepancies

**Non-Catalog Item** ? X

**Un Techo Para Argentina AC** [select different supplier](#)

1234 San Juan Blvd, Valparaiso, CL

[Distribution Methods](#)

Product Description	Catalog No.	Quantity	Price Estimate	Unit of Measure
Test International Item	12345	1000	4	EUR ▼

231 characters remaining [expand](#) | [clear](#)

[Product Details](#)

[Add Internal Attachments](#)

Commodity Code  [search](#)

[Save and Close](#) [Save and Add Another](#) [Close](#)



# Foreign Currency Overview

## Notes:

- Foreign Currencies are set at the supplier level and user profile level. **If you encounter a situation where your supplier is not showing the appropriate currency, please contact the Supplier Onboarding team ([askfinancelink@nyu.edu](mailto:askfinancelink@nyu.edu)), or submit a supplier maintenance request.**
- Corresponding FAME Encumbrances for requisitions submitted with Foreign Currency will be converted into US Dollars based on the exchange rate the day of Purchase Order issuance. The Approval routing for the requisition will be based upon this USD equivalent but the PO will be generated in the foreign currency to the supplier. Conversion discrepancies will be resolved at the time of payment to ensure the original foreign currency amount is honored.

The screenshot shows a 'Price Estimate' form. On the left, there is a text input field containing the number '15000'. To the right of this field is a dropdown menu for selecting a currency. The dropdown is currently open, showing four options: 'USD' (which is highlighted in blue), 'ARS', 'EUR', and another 'USD' option at the bottom. A small downward arrow is visible next to the top 'USD' option.

Example 10: Request a payment to “foreign payee 1” in foreign currency.



- **Profile Search**

- Quick Search

- My Recent Documents

- Action Items & Notifications

- **Document Search**

- Simple Search

- Advanced Search

- Save/Export Search

- **Document Summary**

- History

- Comments

- Attachments

- PO, Invoice, Receipt, &

- Payment Information

The screenshot shows a web-based search interface. At the top, there is a 'Search' label, a dropdown menu set to 'All Documents', and a 'Go' button. A link for 'simple search' is also visible. The interface is divided into three main sections: 'General Document Identification' with a 'Document Number(s)' input field; 'Document Information' with fields for 'Participant(s)', 'Owner', 'Date' (a dropdown menu currently showing 'All Dates'), 'Total Amount' (a dropdown menu), 'Supplier', and 'HR Dept'; and 'Item/Product Information' with a 'Catalog Number(SKU)' input field and a 'Product Description' input field. Below these, there is a 'Product Flags' section with a grid of checkboxes and icons for various categories: Controlled substance, Green, Rad Minor, Recycled, Toxin, Energy Star, Hazardous material, Radioactive, and Select Agent. A 'Go' button is located at the bottom right of the form.

Demonstrate: Search for requisition already in the system “PO 1”



# Course Summary



# Congratulations!

You have successfully completed the **i-Buy NYU Introduction** course! Please refer to the following for more assistance:

- [\*\*i-Buy NYU Resource Portal\*\*](#) which includes Training Materials, i-Buy NYU Introductory Guide, Sneak Peek Video, Buying & Paying Guide, Detailed User Guide, Commodity Code-to-Account Code Mapping, and more!
- [\*\*www.nyu.edu/financelink\*\*](http://www.nyu.edu/financelink) for more information under “*Buying & Paying*” about the transition to i-Buy NYU





# On-Demand Training Materials

## Step-by-Step Tip Sheets:

- Submitting Punchout Order
- Submitting Non-Catalog Order
- Submitting Catalog Order
- Customizing Profile and Setting Favorites
- Approving a Requisition
- Returning/Rejecting Requisition
- Receiving Goods and Services
- Searching Documents
- Setting up Recurring and Pre-Payment Requests
- Creating Standing Orders
- Splitting Chartfields
- Copying Requisitions
- Requesting a New Supplier
- Requesting Foreign Currency
- Commodity Codes
- Requesting Change Orders
- Total Supplier Management
- Understanding i-Buy NYU Forms
- Managing your shopping cart/approval queue

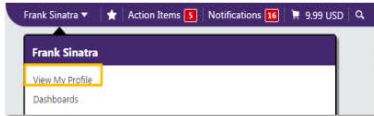
CUSTOMIZING YOUR USER PROFILE

### WHAT'S MY PROFILE?

Profiles in i-Buy NYU allow you to make the buying and paying process more efficient and customize your user experience by allowing you to save default information, shopping addresses, frequently used chartfield values, cart assignees, notification preferences and email approval options. **Note**, some of the values in your profile are maintained administratively and cannot be changed – these include user roles, permissions, order settings and approval settings.

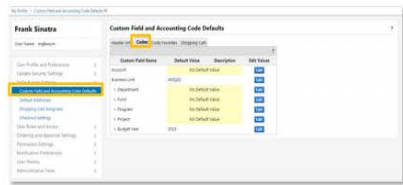
### LET'S GET STARTED

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, click your name in the dashboard located in the top right and select **View My Profile** from the menu.

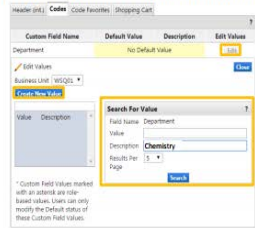


### SETTING CHARTFIELD DEFAULTS

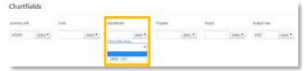
1. Click **Default User Settings > Custom Field and Accounting Code Defaults** and then **Codes**.



2. Within this menu, you have the option of defaulting Department, Fund, Program and Project. Be selective in what accounting values should actually be used as defaults for every order. Click the **Edit** button.
3. Click the **Create New Value** button and search using the value or description (Example: *Department Description = Chemistry*).



4. Select the desired value(s) and click the **Add Values** button.
5. The selected values will now appear as drop-down values that are quickly accessible during the Chartfield selection step of the Checkout process, as shown below.



6. For your first checkout, you will be prompted to add a shipping address to your profile. Click **Want to use a different address? Click here to add addresses to your profile**, then click **Select Address for Profile**, and search the directory using the building name or street number.



# On-Demand Training Materials

## Video Tutorials:

- Customizing Profile and Setting Favorites
- Total Supplier Management (Supplier Requests)
- Submitting Non-Catalog Order
- Creating Standing Orders
- Submitting Catalog/Punch-out Orders
- Receiving and Matching
- Approving a Requisition
- Returning/Rejecting Requisition
- Change Orders
- Searching Documents







# Post Go-Live Support

**In addition to self-guided and “on-demand” training materials, including Tip Sheets and Quick Videos, the Project Team will be available to support post go-live:**



**Special hotline for  
questions and  
support**



**Email questions to  
[askfinancelink@nyu.edu](mailto:askfinancelink@nyu.edu)**



**On-site visits and office  
hours**