FIN: Creating an Order from a cyBUY Supplier for Departments

Overview

- Requesters will connect to cyBUY through Workday and release their cyBUY cart to create a requisition
- **All employees** may create requisitions through cyBUY in Workday or have a Procurement and Expense Specialist do so on their behalf
- cyBUY will have a new look but will function similar to the current state
- cyBUY is a one stop location for access to many of Iowa State University's contracted suppliers
- Purchases can be made with high dollar limits
- Procurement services does not require paperwork (examples: packing slips or detailed receipts) for cyBUY purchases
- With increased dollar volume, procurement agents can negotiate better pricing, higher discounts and free shipping
- **For more information, reference the ‘Using CyBUY in Workday’ computer-based training on Learn@ISU (WKC-TRN-FIN-CYBUY-ON)**

Business Process Flow

*Initiators:* Either the worker requesting the goods or service, or their Procurement and Expense Specialist

*Key Fields:* Business purpose, Driver Worktag (optional), ship-to location

Navigate to the **Procurement Application from the Workday Landing Page**

Connect to the **cyBUY Market Place**

Add item(s) to shopping cart

Checkout: Business Purpose, Default Ship-to Address, Worktags (optional)

Routes to Procurement and Expense Specialist for review

If contains Grant Worktag, routes to Grant Finance Specialist

Order dispatched to supplier

Order received

Receipt of good confirmed through a p-card verification complete by the Cost Center Manager(s)

If >$5,000, routes to Cost Center(s) Manager for approval
1. **Navigate to cyBUY**

   1. Navigate to the **Procurement Application**
   2. Select **Connect to cyBUY** under Procurement Tasks

   ![Procurement Tasks](image)

3. **Select Connect** on the right-hand side of the next screen

   ![Connect to Supplier Website](image)
2. Create a shopping cart in cyBUY

1. The cyBUY dashboard includes recently requested products and supplier punchout icons
   a. You can search for items using keywords in the search bar before selecting a supplier, or choose a supplier by selecting its icon at the bottom of the screen. **You will get the best search results by going in to the particular supplier catalog(s) that carry the items you want to purchase.**

![cyBUY dashboard with search bar and recently requested products]

2. Once connected to a supplier’s website, add items to your shopping cart.
   a. **Note: This process will look slightly different across Suppliers**

![Supplier website with search results and add to cart button]
3. In the shopping cart, select **Checkout** or **Continue Shopping**

![Shopping Cart Image]

4. Follow the instructions in the supplier catalog to transmit your cart into Workday where you can checkout and create a requisition. The steps to transmit your cart may vary slightly between suppliers.

   Review your cart in the Workday cyBUY cart summary screen and select **Checkout**

![Cart Summary Image]
5. Once the cart is returned to Workday and looks correct, you can select **Checkout**

3. **Complete the Checkout Process**

1. Navigate through and enter any required information through each tab to complete the checkout process (outlined by steps 2-7 below)

2. On the **Shipping Address Tab:**

   a. Review the shipping information on the requisition.

   b. The default ship-to address on purchase requisitions is the business site associated with the requester’s position. The Default Deliver-To will default from the requester’s work space.

   c. When creating a requisition, a requestor can select the building by searching within the default ship-to address drop-down.

   d. cyBUY orders from Office Depot and Grainger are shipped to ISU Central Receiving and are delivered to campus by Central Stores. Orders will be delivered to the location the requestor indicates in the deliver-to drop-down.

   e. Some suppliers are also able to accept alternate addresses provided by the requestor. Shipping to non-ISU addresses may be subject to additional review.
3. On the **Information Tab**, the only field that is required is the **Internal Memo** field where the **Business Purpose** should be entered. This is the detailed purpose of the order explaining why the university is making this purchase. All other fields are either auto-populated or are not needed for cyBUY orders. Please do not edit or enter information into those fields.
4. On the **Attachments Tab**:  
   a. Attachments are usually not needed for cyBUY orders. If you choose to add attachments (packing slips, order confirmations, emails, etc.), you can upload them here.

5. On the **Line Defaults Tab**  
   a. The **Requested Delivery Date** is used for non-catalog orders only  
   b. The **Supplier** field is used for non-catalog orders only  
   c. **RFQ Requirements** does not need to be completed, this is for non-catalog orders only  
   d. Use the ‘Default Worktags and Splits’ section of this tab default Worktags for all lines on the requisition.
i. Select **Use Default Worktags** to default one set of Worktags for the entire order

ii. Select **Use Default Splits** to split Worktags for the entire order

iii. If Worktags need to be entered individually by each line of the order, then the Line Defaults tab can be skipped

iv. **Note:** If known, department requesters may enter Driver Worktag(s) for the requisition. If you are not aware of your Driver Worktag(s), submit the requisition without, and a Procurement and Expense Specialist will enter on your behalf

6. On the **Review and Submit** tab
   a. All order information is reviewed for accuracy before submitting
   b. The only information that can be changed on the line items is the Worktags, or items may be deleted from the order
   c. If the order requires different Worktags per line, this is where they may be entered, funding may be split among multiple Worktags by line item
7. Select **Submit** once all information is verified as correct
   a. Requisitions may also be saved for later

4. **Order is submitted for approvals**

   1. After submitting, you will see that the requisition was successfully submitted and is awaiting action or completed successfully (meaning no approvals are required)
2. Approvals are as follows:
   a. If requisition is submitted by a department requester, the Procurement and Expense Specialist will review
   b. If the requisition contains a Grant Worktag, the Grants Finance Specialist will review to ensure compliance with grant terms and conditions
   c. If the order is greater than or equal to $5,000 the Cost Center Manager will approve
   d. The order will then be sent to the cyBUY supplier
   e. Note the cost center manager will approve payment of the transaction after the order is received through the p-card verification process

3. The status of orders may be tracked through the My Requisitions report