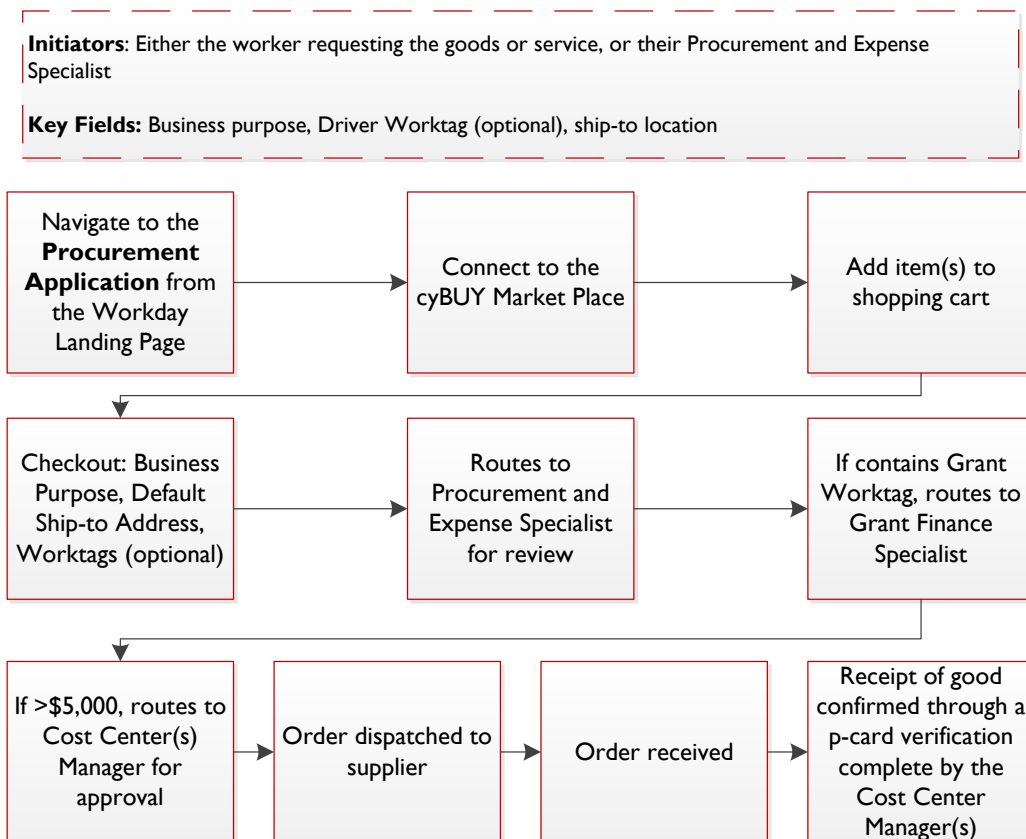


FIN: Creating an Order from a cyBUY Supplier for Departments

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)**

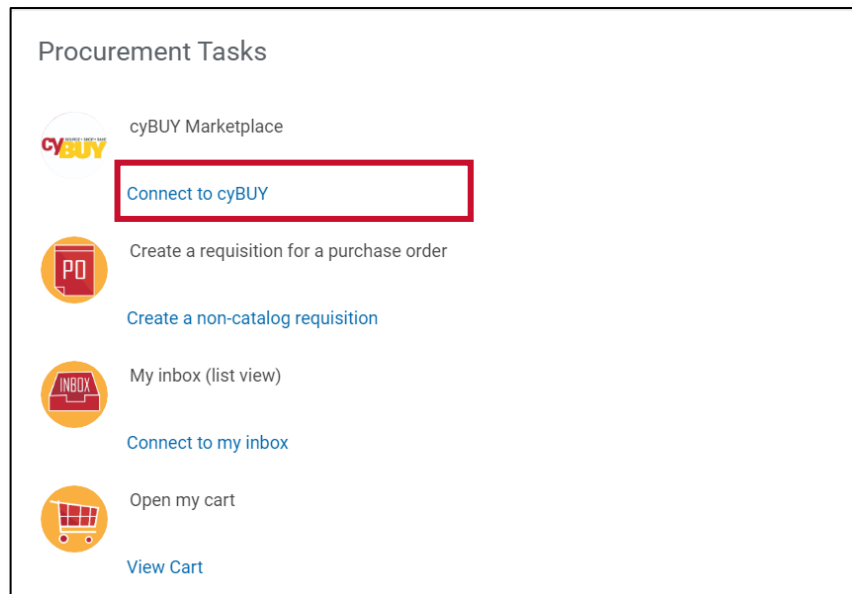
Business Process Flow



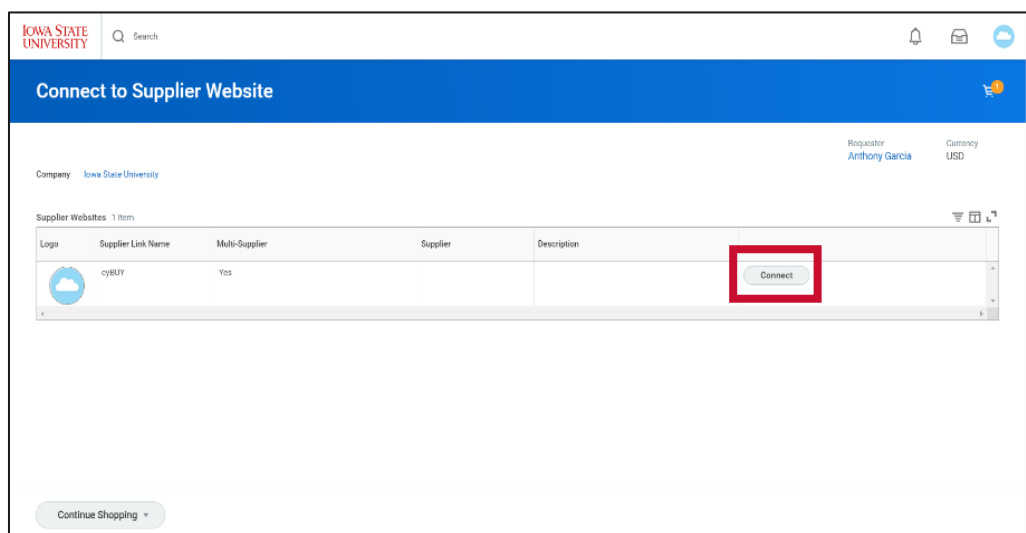
FIN: Creating an Order from a cyBUY Supplier for Departments

I. Navigate to cyBUY

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



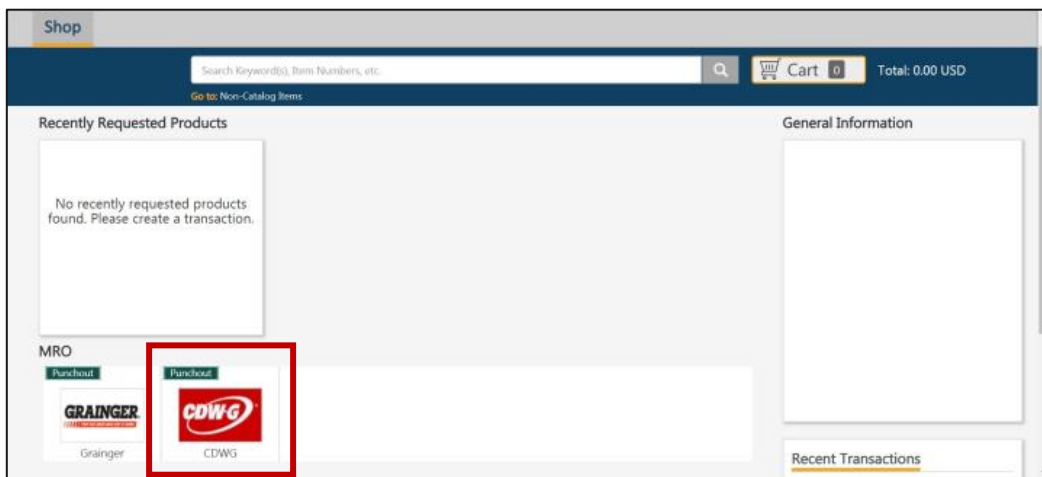
3. Select **Connect** on the right-hand side of the next screen



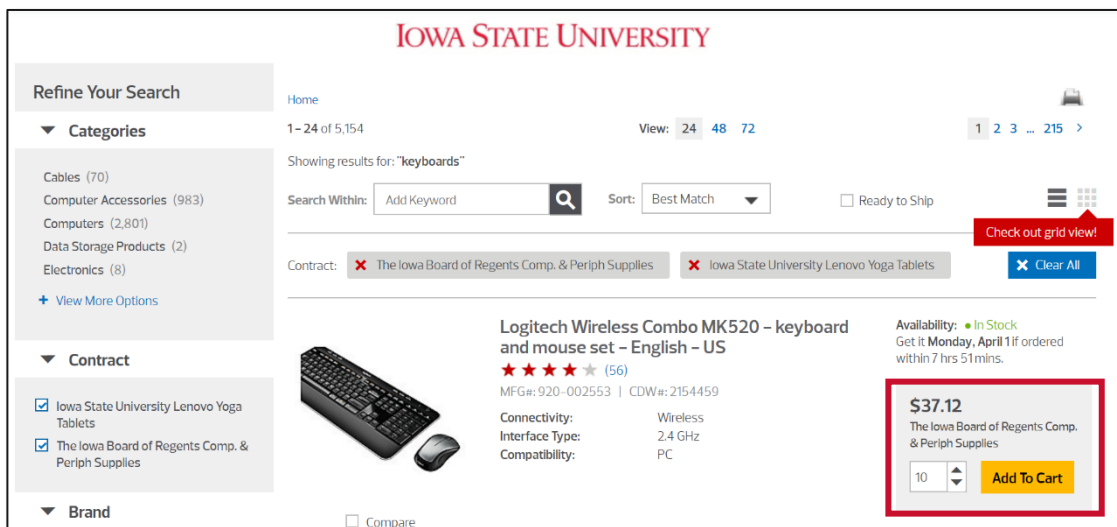
FIN: Creating an Order from a cyBUY Supplier for Departments

2. Create a shopping cart in cyBUY

- I. 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.**



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



FIN: Creating an Order from a cyBUY Supplier for Departments

3. In the shopping cart, select **Checkout** or **Continue Shopping**


Shopping Cart

Email Cart

Continue Shopping

Add Item to Cart

Enter CDW # or MFG #

Item	Availability	Price	Quantity	Item Total
 Logitech Wireless Combo MK520 – keyboard and mouse set – English – US MFG Part: 920-002553 CDW Part: 2154459 UNSPSC: 43211706	In Stock Get it Monday, April 1 if ordered within 7 hrs 48 mins.	\$37.12 The Iowa Board of Regents Comp. & Periph Supplies	10	\$371.20

Update All | Remove All

Order Summary

Subtotal: \$371.20

Tax and Shipping calculated at checkout.

Lease Option Pricing ⓘ
\$10.95 / Month


Standard Quote

Checkout

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**


Shop

16 Stacy 

Search Keywords, Item Numbers, etc.

Cart Total: 32.08 USD

Item Summary (1 Items)

Item Details	Quantity	Price (USD)	Subtotal (USD)
 Logitech Wireless Combo MK520 keyboard and mouse set English US By: CDWG Catalog Item #: 2154459 Mfg/Provider: Logitech	1	32.08 / EA	32.08

Cart Summary

Total Items in Cart: 1

Number of Suppliers: 1

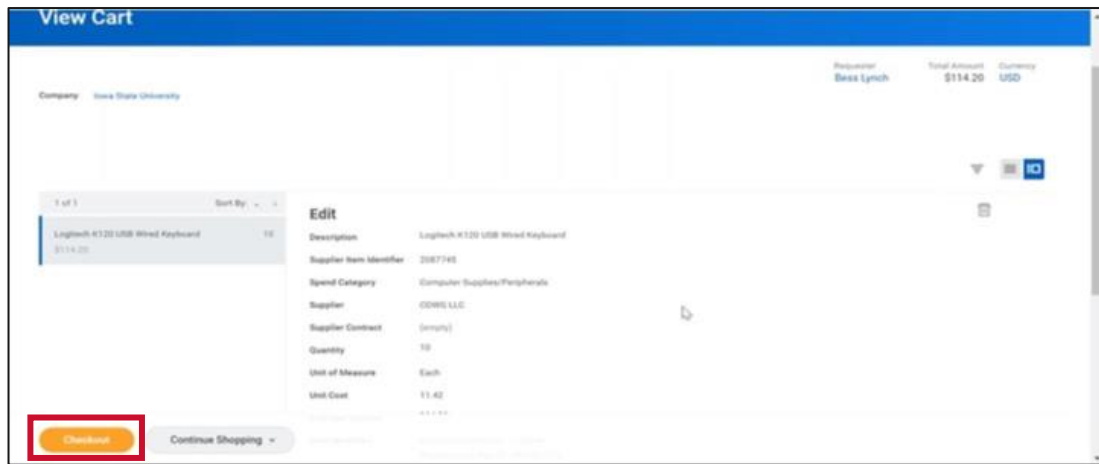
Cart Total (USD): 32.08

Checkout

Convert Cart to 1 transaction(s)

FIN: Creating an Order from a cyBUY Supplier for Departments

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.

FIN: Creating an Order from a cyBUY Supplier for Departments

The screenshot shows the 'Shipping Address' form. On the left is a sidebar with tabs: 'Shipping Address' (selected), 'Information', 'Attachments', 'Line Defaults', and 'Review and Submit'. The main area is titled 'Shipping Address'. At the top right, there is a summary table:

Requisition	Status	Total Amount	Currency
- new -	Draft	\$0.70	USD

Below this, the form contains several sections:

- Default Deliver-To:** A dropdown menu showing 'X BSHR - Beardshear Hall'.
- Apply Deliver-To changes to all lines:** A checkbox that is currently unchecked.
- Default Ship-To Address:** A dropdown menu showing 'X 515 Montell Rd Ames, IA 50011-2100 United States of America'.
- Apply Ship-To Address Changes to All Lines:** A checkbox that is currently unchecked.
- Use Alternate Address:** A checkbox that is currently unchecked.
- Alternate Address:** A text input field.

At the bottom left of the form is an orange button labeled 'Next'.

- 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.

The screenshot shows the 'Information' form. On the left is a sidebar with tabs: 'Information' (selected), 'Attachments', 'Line Defaults', and 'Review and Submit'. The main area is titled 'Information'. At the top right, there is a summary table:

Requisition	Status	Total Amount
- new -	Draft	\$0.70

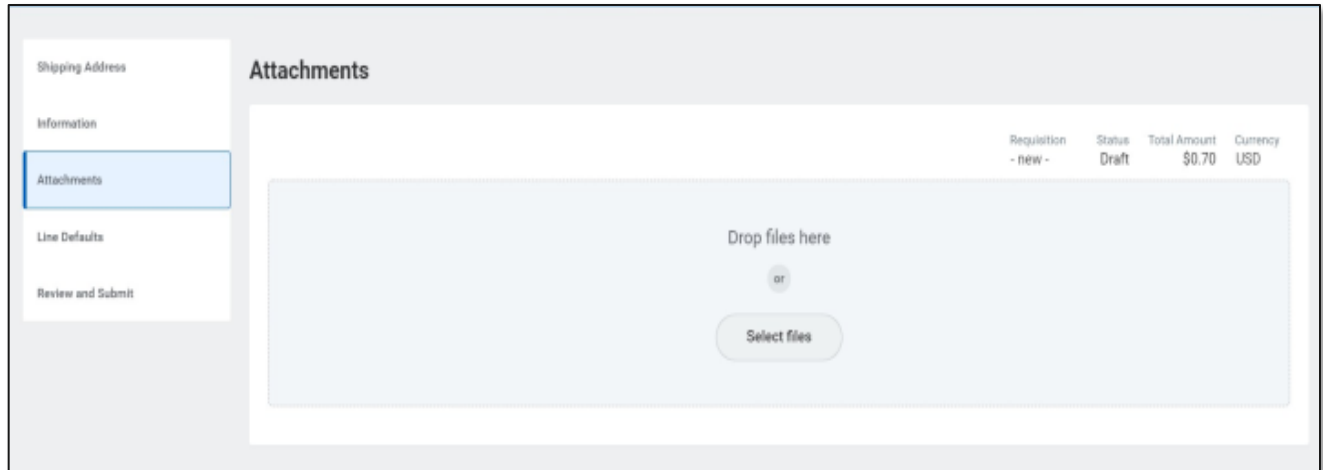
Below this, the form contains several fields:

- Company:** Iowa State University
- Requester:** Betsy Lynch
- Requisition Type:** A dropdown menu.
- Request Date:** 02/07/2019
- Sourcing Buyer:** A dropdown menu.
- High Priority:** A checkbox that is currently unchecked.
- Memo to Suppliers:** A text input field.
- Internal Memo:** A text input field, which is highlighted with a red rectangular border.

FIN: Creating an Order from a cyBUY Supplier for Departments

4. On the **Attachments Tab**:

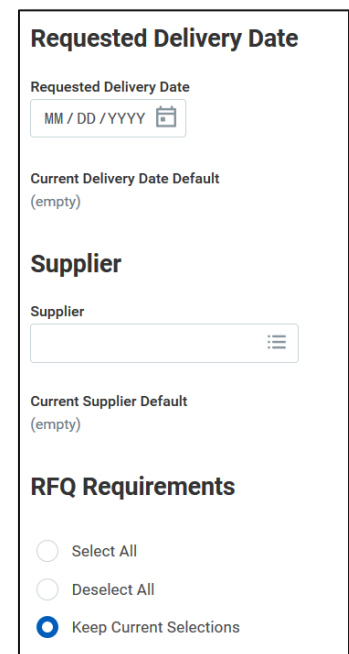
- a. Attachments are usually not needed for cyBUY orders. If you choose to add attachments (packing slips, order confirmations, emails, etc.), you can upload them here.



The screenshot shows a web interface with a sidebar on the left containing links: Shipping Address, Information, Attachments (highlighted), Line Defaults, and Review and Submit. The main area is titled 'Attachments' and contains a large light blue box with the text 'Drop files here' and a 'Select files' button. Above this box, there is a header with fields: Requisition (new), Status (Draft), Total Amount (\$0.70), and Currency (USD).

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.



The screenshot shows a web interface for the 'Line Defaults' tab. It contains several sections: 'Requested Delivery Date' with a date picker (MM / DD / YYYY) and a calendar icon; 'Current Delivery Date Default' (empty); 'Supplier' with a dropdown menu and a menu icon; 'Current Supplier Default' (empty); and 'RFQ Requirements' with three radio buttons: 'Select All', 'Deselect All', and 'Keep Current Selections' (which is selected).

FIN: Creating an Order from a cyBUY Supplier for Departments

- 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**

The screenshot shows the 'Default Worktags and Splits' tab selected in the left-hand navigation menu. The main content area has a title 'Default Worktags and Splits' and a subtitle 'Select worktag defaults for all lines on the requisition. Choose a single set or split by percentage of cost. This selection overrides any changes you may have made at the line level.' Below this is a 'Copy from Worktags Template' dropdown menu. A red box highlights the radio button options: 'Use Default Worktags' (which is selected), 'Use Default Splits', and 'None of the above'. Below the options is a table with the header '1 Item' and columns for 'Program', 'Grant', 'Gift', 'Project', and 'Department Detail'. The table is currently empty.

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

FIN: Creating an Order from a cyBUY Supplier for Departments

7. Select **Submit** once all information is verified as correct
 - a. Requisitions may also be saved for later

The screenshot shows a web interface for creating a requisition. It features two main sections: 'Goods' and 'Services'. The 'Goods' section contains a table with columns: Image, Item, Item Description, Supplier Item Identifier, and Purchase Item. Two items are listed: 'Item 11000110 - Cacodylic Acid, Crystalline, 100 g' and 'Item 11000510 - Acetic Acid, glacial, 500 mL'. The 'Services' section is currently empty. At the bottom left, there are three buttons: 'Submit' (highlighted with a red box), 'Save for Later', and 'Cancel'.

4. Order is submitted for approvals

- I. After submitting, you will see that the requisition was successfully submitted and is awaiting action or completed successfully (meaning no approvals are required)

The screenshot shows a confirmation page titled 'You have submitted'. It displays the following information: 'Requisition: REQ-1000033, Requester: Bess Lynch, Date: 03/08/2019, Amount: \$159.72'. Below this, there is a section 'Up Next' with a cloud icon and the name 'Harvey Dent'. It says 'Review Requisition' and 'Due Date: 03/12/2019'. There is a link '> Details and Process'. At the bottom, there is a 'Done' button.

FIN: Creating an Order from a cyBUY Supplier for Departments

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