

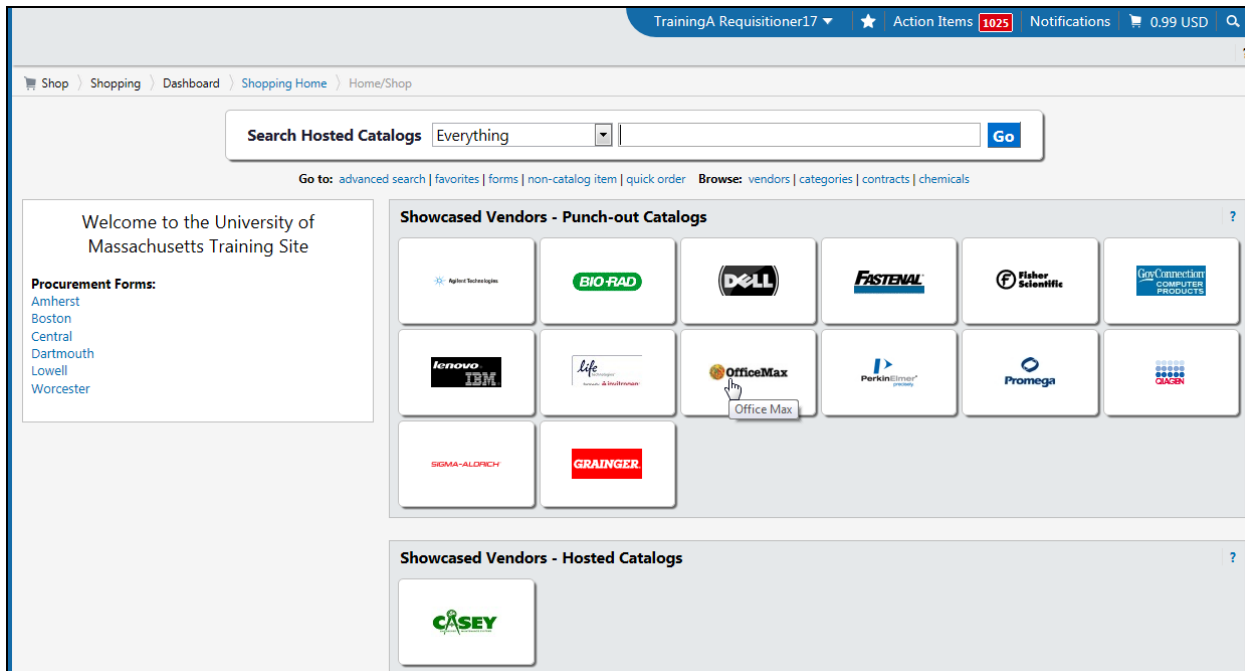


Adding Items from a Punch-out Supplier



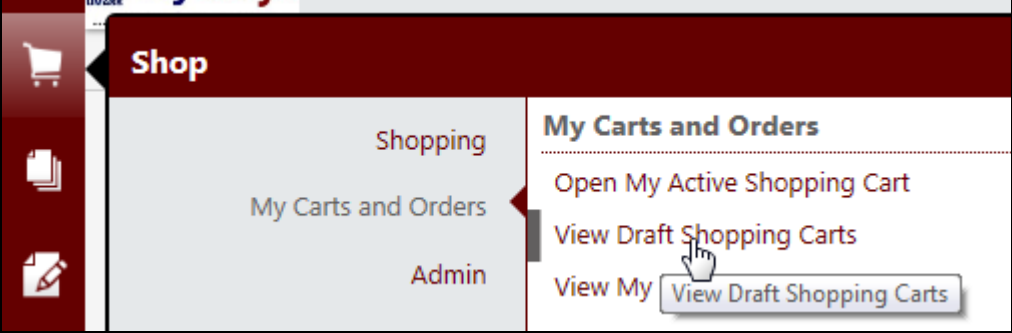
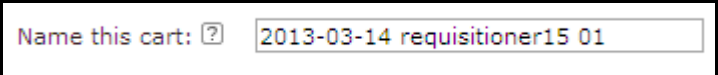

Note: It is recommended that you Bookmark frequently used pages as Favorites to save navigation steps:



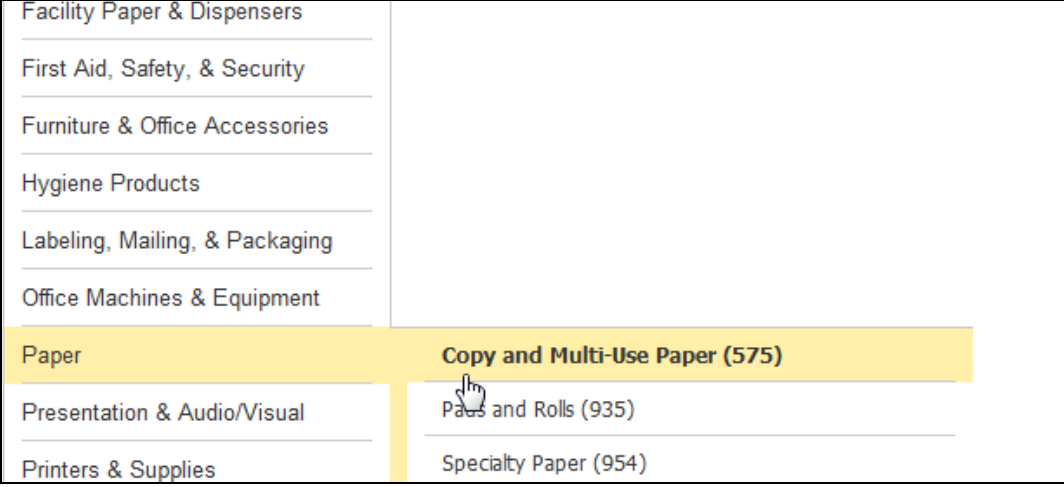
Step	Action
	<p>On the home/shop page, the Showcased Vendors - Punch-out Catalogs area highlights the most frequently used punch-out vendors at your campus.</p>  <p>To access this page, select the  icon on the far left of the top of the page, if that page isn't already displayed.</p> <p>Each campus will have a customized view.</p> <p>Punch-out is when you leave BuyWays to shop at a vendor's website, then bring the items you select back to your BuyWays cart to submit the order.</p>


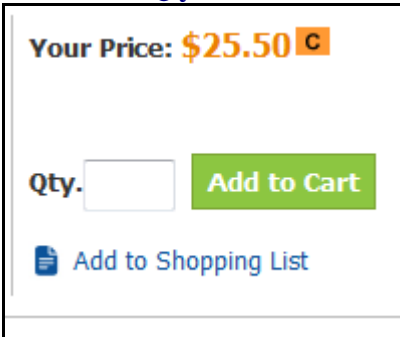
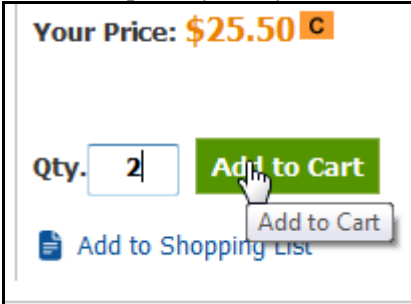
Screenshot of the Home page in the Training Environment, which might differ from what you see in Production:

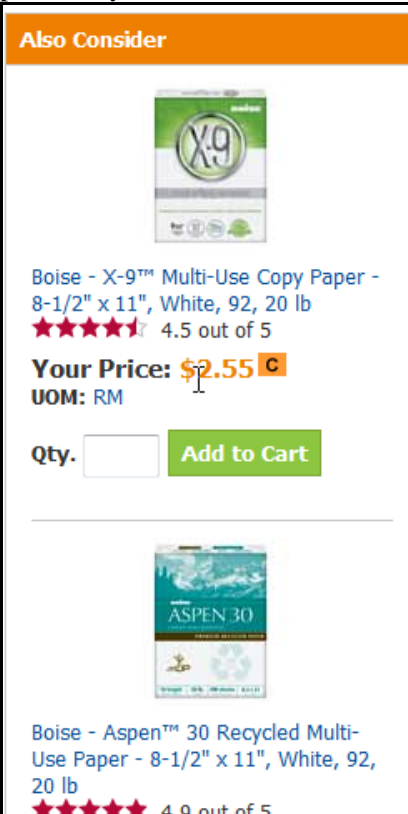

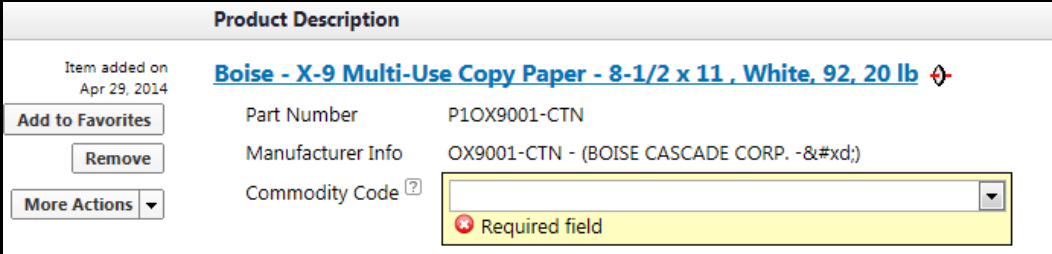


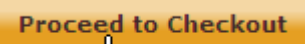

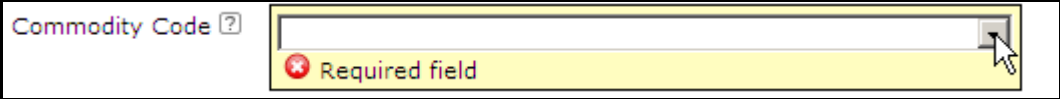
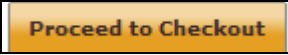



The screenshot shows the 'Home/Shop' page in a browser. At the top, there is a navigation bar with 'TrainingA Requisitioner17', 'Action Items 1025', 'Notifications', and '0.99 USD'. Below this is a breadcrumb trail: 'Shop > Shopping > Dashboard > Shopping Home > Home/Shop'. A search bar for 'Hosted Catalogs' is set to 'Everything'. Navigation links include 'Go to: advanced search | favorites | forms | non-catalog item | quick order' and 'Browse: vendors | categories | contracts | chemicals'. The main content area features a 'Welcome to the University of Massachusetts Training Site' message and a list of 'Procurement Forms' for Amherst, Boston, Central, Dartmouth, Lowell, and Worcester. The 'Showcased Vendors - Punch-out Catalogs' section displays a grid of vendor logos: Agilent Technologies, BIO-RAD, DELL, FASTENAL, Fisher Scientific, GrayConnection, lenovo, life technologies, OfficeMax, ParkinDent, Promega, SIGMA-ALDRICH, and GRAINGER. The 'OfficeMax' logo is highlighted with a mouse cursor. Below this is the 'Showcased Vendors - Hosted Catalogs' section, which currently shows the CASEY logo.

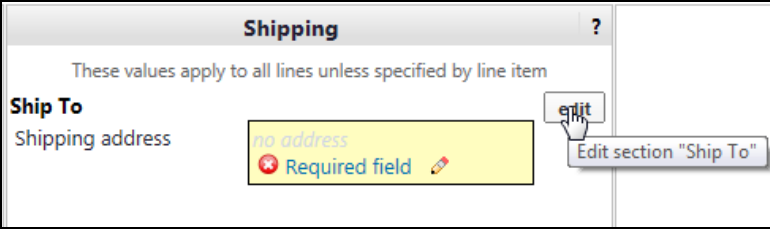
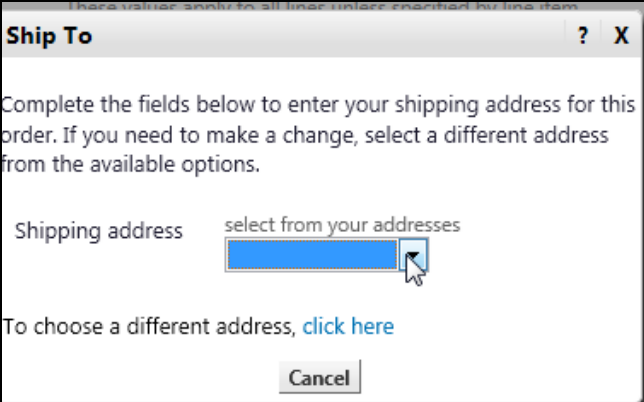
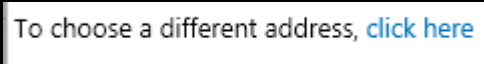




Step	Action
<p>NOTE:</p>	<p>Always check your cart (upper right corner of the page) to make sure that you don't have an active cart open, or your new requisition lines could be added to the active cart.</p> <p>e.g., the following example shows that you already have an active cart open. (The cart icon shows a dollar amount next to it.)</p>  <p>If you don't want your new requisition lines added to an active cart, please proceed as follows:</p>
<p>1.</p>	<p>Create a new cart by navigating to the cart Icon on the left side of the page:</p> 
<p>2.</p>	<p>Select <i>My Carts and Orders/View Draft Shopping Carts</i></p> 
<p>3.</p>	<p>Select the Create Cart button</p>
<p>4.</p>	<p>Name your cart, if you like:</p>  <p>This is a searchable field</p>
<p>5.</p>	<p>Click the Update button to make sure the change holds.</p>
<p>6.</p>	<p>Click the start shopping link:</p> 

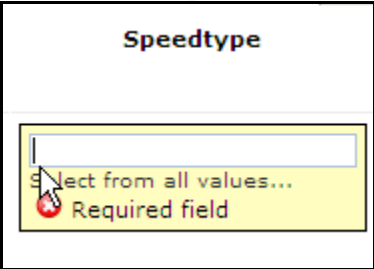

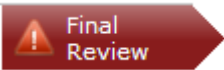

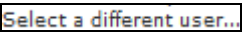


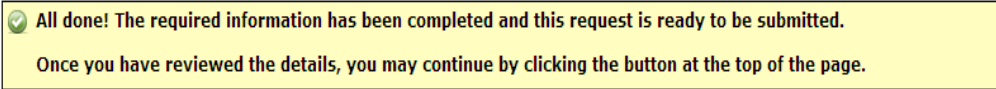
Step	Action
7.	<p>The Home/Shop pages opens.</p> <p>For this example, we need office supplies.</p> <p>Click the OFFICE MAX button.</p>  <p><i>Note:</i> If you get a security message, select the NO option.</p>
	<p>The Office Max site opens. Each punch-out site will have a different layout and the shopping experience for each may be a little bit different. There are job aids available for most sites at the A&F website http://www.umass.edu/afsystems/basic-page/umass-buyways/91. Scroll down to <i>Catalog Vendor Information</i>.</p>
8.	<p>Select the <i>Create New Order</i> link:</p>  <p>The page that allows you to do a product search, or Shop by Category opens.</p>
9.	<p>In this example, we will order paper.</p> <p>Scroll down the page until you see the link for Paper:</p> 
10.	<p>Click the Copy and Multipurpose Paper link.</p>

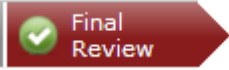
Step	Action
11.	<p>The results for Copy & Multipurpose Paper display.</p> <p>Select the Copy Paper link:</p> 
12.	View the copy paper options and select the Boise X-9™ Multi Use Copy Paper
13.	<p>Click in the Qty field.</p> 
14.	<p>Insert the quantity that you want and Click the Add to Cart link.</p> 

Step	Action
15.	<p>A message appears listing other options and prices. You choose to continue with your item as previously selected.</p>  <p>The screenshot shows a section titled "Also Consider" with two product listings. The first listing is for Boise - X-9™ Multi-Use Copy Paper - 8-1/2" x 11", White, 92, 20 lb, with a price of \$2.55 and a 4.5 out of 5 star rating. The second listing is for Boise - Aspen™ 30 Recycled Multi-Use Paper - 8-1/2" x 11", White, 92, 20 lb, with a 4.9 out of 5 star rating. Both listings include an "Add to Cart" button.</p>
16.	<p>You may continue to search for, add items, or edit your cart, if you wish.</p> <p>For this example, we are finished shopping.</p>
17.	<p>Click the Checkout button:</p> 
18.	<p>The purchase information is displayed in your BuyWays shopping cart.</p>  <p>The screenshot shows a "Product Description" for Boise - X-9 Multi-Use Copy Paper - 8-1/2 x 11 , White, 92, 20 lb. It includes a "Part Number" (P1OX9001-CTN), "Manufacturer Info" (OX9001-CTN - (BOISE CASCADE CORP. -&#xd;)), and a "Commodity Code" field which is highlighted in yellow and marked as a "Required field".</p>

Step	Action
19.	<p>IF YOU ARE A SHOPPER, YOU MAY IGNORE THE REQUIRED FIELD  MESSAGES, SELECT THE  BOX, AND SKIP TO STEPS 38-40, or you may continue, below, to populate additional fields, if you like. Requisitioners will continue, as follows:</p>
20.	<p>To select the commodity code for this product:</p> <p>Click the Drop-down menu</p>  <p>and select the commodity that is appropriate for your line description.</p>
Note:	<p>It is unnecessary to reference a contract identifier for catalog purchases. All items in the vendor punch-out catalog are contracted items and are identified as such in the system.</p>
21.	<p>Click the Proceed to Checkout button.</p> 
22.	<p>The required information ribbon indicates this order is missing its Shipping and Accounting Codes information.</p>  <p>This information must be entered before submitting the request for approval. All tabs must contain a checkmark to qualify for submittal to workflow.</p>
23.	<p>Click the edit button on the Shipping tab. </p> 

Step	Action
24.	<p>Click the edit button, and</p>  <p>Click the select from your addresses drop down arrow and search for and select the desired address. Remember to fill in the room, floor, and building (if applicable)</p> 
Note:	<p>If no default or Favorites have been saved to your Profile, search for and select the desired Ship to by clicking on the  link and then click the select from org addresses link..</p>
25.	<p>Click the Save button.</p> 
26.	<p>To add the required accounting information:</p> <p>Click the Accounting Codes tab in the required information ribbon.</p> 
27.	<p>To enter the Speedtype:</p>  <p>Click the  button.</p>

Step	Action
28.	<p>Click in the Required field box under Speedtype.</p> 
29.	<p>Insert the desired Speedtype: e.g., 123456-A (case sensitive) Or, You may use the Select from all values link to perform a search.</p>
30.	<p>Insert the account code in the Required field box under Account: e.g., 757030-A (case sensitive) Or, You may use the Select from all values link to perform a search</p>
31.	<p>You may also select a Class at this screen level, if appropriate.</p> <p>When you have finished with this page:</p> <p>Click the Save button.</p> 
32.	<p>Click the Final Review link.</p> 
33.	<p>The Prepared for identifier in the General Section of the Header may be changed if the Requisitioner entered the requisition for someone else and wants to identify that person (email notifications about the requisition will go to the person identified in the Prepared for)</p> <p>To change the Prepared for Click the edit button.</p> 
34.	<p>Click the Select a different user... link.</p> 
35.	<p>Enter specific information in the User Search fields. Or,</p> <p>Click the Search button to</p> 
36.	<p>Click the Save button.</p> 
37.	<p>The yellow message box lets you know the required information fields have been completed.</p> 

Step	Action
38.	<p>Shoppers – continued from Step 19:</p> <p>If you are a Shopper, use the Assign Cart box to search for and select your requisitioner and add instructions using the Note to Assignee field.</p> <p>(Check with your department to get the name of your Requisitioner, if you don't already know who that is.)</p> <div data-bbox="264 499 1005 867" style="border: 1px solid black; padding: 5px;"> <p>Assign Cart [?] [X]</p> <p>Assign Cart To: Search for an assignee</p> <p>Note To Assignee: <input type="text"/> [↑] [↓]</p> <p style="text-align: right;">expand clear</p> <p><small>Note: After a cart is submitted, it can be viewed via History. Prior to being submitted, the cart can be viewed in Draft Carts and can be unassigned (withdrawn) if needed.</small></p> <p style="text-align: center;">Assign Cancel</p> </div>
39.	<p>Click the Assign button.</p> <div data-bbox="264 919 370 951" style="border: 1px solid black; padding: 2px; display: inline-block;"> Assign </div>
40.	<p>A message appears letting you know your cart has been successfully assigned to a Requisitioner for completion and processing of your requisition.</p>
41.	<p>Requisitioners – continued from Step 37:</p> <p>If you have created the cart as a Requisitioner and all the required information has been completed, you can submit the catalog Requisition for approval, in accordance with the policy for your campus.</p>
NOTE:	<p>Catalog orders require no approval up to \$2,499.99, unless charged to a grant or if against a commodity that requires special approval. Between \$3,000 and \$9,999.99, catalog orders require departmental approval. At \$10,000 or greater, they require Procurement approval, as well.</p>
42.	<p>Click the Submit Requisition button.</p> <div data-bbox="264 1514 516 1560" style="border: 1px solid black; padding: 2px; display: inline-block;"> Submit Requisition </div> <p>(You must be on the  Final Review tab for this button to activate.)</p>

Step	Action
43.	<p>A message appears letting you know your cart has been successfully submitted.</p> <div style="border: 1px solid black; padding: 5px;"> <p>Requisition Information</p> <p> Congratulations! You have successfully submitted your request. If you need to view or print a copy, click Quick View or view its status on the Approvals Tab.</p> <p>Here is a summary of the requisition. You can also retrieve this requisition at any time via the document history search page.</p> <p>Requisition number 941564 view</p> </div>
44.	<p>Congratulations! You have successfully added an item from a punch-out supplier.</p> <p>End of Procedure.</p>

NOTE: Please go to the A&F Website at <http://www.umass.edu/afsystems/basic-page/umass-buyways/91> - for additional job aids, including some that detail how to maneuver through the various vendor catalogs.

UMass BuyWays

UMass BuyWays is the one stop shopping center for eProcurement Users. The center provides an easy route to all your purchasing needs. All requisitions, purchase orders and PO Vouchers originate in BuyWays.

You can sign up for BuyWays requisition training at Workplace Learning & Development

Related Resources

1. NEW BuyWays

Attachment	Size
Phoenix - Navigation Job Aid_01.17.14.docx	506.46 KB

Accounts Payable

Attachment	Size
AP Look Up Payment Information, incl. special handling_01.21.14.doc	363.5 KB

Approver Job Aids

Attachment	Size
Approval review and approve_01.07.14.doc	726 KB
Approval review and approve via email_01.13.14.doc	362.5 KB
Approval Assign a substitute approver_01.13.14.doc	457.5 KB
Approval return forward req v2_01.13.14.doc	602.5 KB
Approval review and approve match exception_01.17.14.doc	467 KB
AP Email Voucher Match Exception Notifications-when to request an override vs. when to do a change order	356.79 KB

[Report a Problem](#)
(Requires netid login)

Login to Application

>> [UMass BuyWays](#)

Need Help?

Application Helpdesk
Ph: (413) 545-2119

[Staff Directory](#)