CLEMSON buyWay$

User Guide 2010

Clemson University
Procurement Services

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1 GETTING STARTED

1.1 Introduction

What is buyWays?

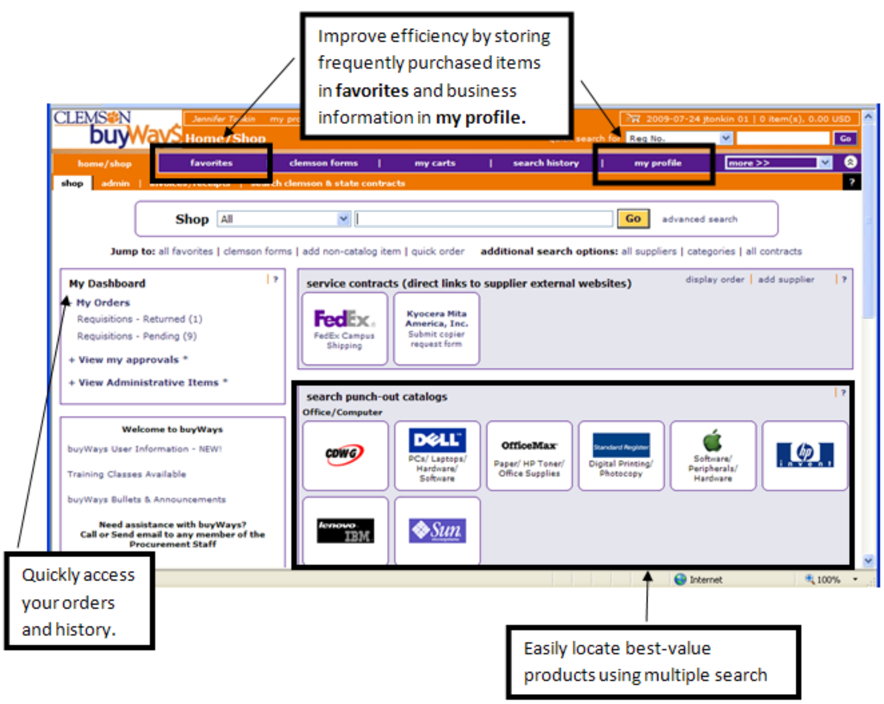
buyWays is Clemson's e-Procurement solution that provides an easy, efficient process for ordering the University's most commonly required goods. More than 50 contract vendors have loaded their electronic catalogs with Clemson-specific pricing to a common platform managed by SciQuest, a North Carolina based vendor. As a buyWays user, you log in with your Clemson network username and password, and have the ability to search more than one million catalog items for the goods you need. The ability to search for and select goods from dozens of online supplier catalogs with Clemson's negotiated contract pricing significantly reduces the time and effort spent on the ordering process.

Requisitioning through one tool streamlines the buying process and allows for electronic routing for approvals. In addition, the system provides access to detailed order history and reporting. Improved reporting allows Clemson Procurement Services to leverage the University's significant buying power and recruit new preferred contract Suppliers.

buyWays is the official tool for purchasing goods and services. It is integrated with our PeopleSoft Financials Applications, which is Clemson's system of record for financial transactions. Following the completion of a buyWays purchase order, a commitment is created in Clemson's PeopleSoft financial system to provide Clemson business offices with accurate and timely financial data.

Navigating

buyWays' home page shown below uses common web-based navigational elements such as custom tool bars, information panels, and tabs:



buyWays' custom tool bar provides quick access to your Profile, where you can change your default settings for such things as accounting codes and shipping/receiving addresses. You can access your purchase order and requisition history, review your shopping carts, search for products using various search tools, access your favorites list, and navigate back to your home page.

The information panels on the left provide organizational messages about buyWays and Clemson buyWays suppliers, system messages about the status of the system, quick access to folders and shopping carts, and resource information including contact information to submit your buyWays questions.

The links in the center allow you to quickly navigate to your favorites list, place a fast order by catalog number, search for a product in the buyWays Catalogs, and access the Non-Catalog requisition forms.

2 MANAGING YOUR PROFILE

In buyWays, you have a user-specific profile that determines what permissions you have been granted, when you will receive email notifications, and the default personal data that will carry over onto your orders. This information is typically updated when you log in for the first time and on an as-needed basis.

Your business officer (or other designee) has identified your role in buyWays, such as a Requisitioner or an Approver. The role selected for you also determines your dollar threshold at which you may self-approve an order or whether the order is electronically forwarded to someone else for additional approval. Each role is associated with a common set of permissions. You may view these permissions but you do not have the authority, or access required to change these permissions. If you require a change to your permissions, please contact your business officer. (See Appendix 2a.)

To view your roles and permissions, go to “My Profile” on the Menu Bar on the buyWays home page and click on “Roles.”

In order to save you time when placing orders, your profile settings will auto-populate your personal data on your orders. When you first log into buyWays, we suggest that you navigate to your profile and review the current information that was preloaded from the PeopleSoft Human Resources files. You will be able to make changes to your basic information such as first name, last name, telephone number and email address. Additionally, you will be able to modify your shipping addresses and accounting codes. These defaults are applied to each order you place. To gain flexibility in placing orders, you may add addresses, shipping instructions, and Approvers to select from when a value other than your default is required.

Finally, you will be able to select from a variety of email communications that are designed to keep you informed about your buyWays order. (See Appendix 2b.)

NOTE: Before placing your first order in buyWays, please note that your shipping address is incomplete. It is essential that you augment your shipping address with a room number, floor or suite for delivery personnel. Failure to modify your shipping address will result in difficulties in receiving your orders.

2.1 Profile Basics

Objective: To verify (and update), if necessary the information in the User Identification section of My Profile.

Key Points:

- Your name was preloaded from the PeopleSoft Human Resources files. However, you may change your first name, last name, telephone number and email address as you want it to appear on requisitions and purchase orders you create.

Scenario: Record your first name, last name, telephone number and email address as you would like them to appear on your purchase requisitions and resulting purchasing orders.

1. Click "My Profile" on Menu Bar

2. Click "User Settings" tab

3. Click "User Identification" on sub-window menu bar

(Update first name as needed.)

(Update last name as needed.)

(Update phone number as needed.)

(Update email address as needed.)

4. Click "Save" button

2.2 Add a Requisitioner

Objective: To set up a preferred requisitioner and add alternate requisitioners in the Purchasing section of My Profile.

Key Points:

- It is recommended that you set up multiple requisitioners including a preferred, and one or more alternates.
- When preparing a shopping cart, requisitioners will appear in the drop-down list under your default requisitioner.
- Change your default requisitioner as needed when your requisitioner is away for a number of days.
- If a desired requisitioner is not available for selection, inform your business officer.

Scenario: Add and delete department requisitioner and select your default requisitioner.

1. Click "**My Profile**" on Menu Bar
2. Click "**Purchasing**" tab
3. Click "**My Requisitioners**" on sub-window menu bar

2.2.1 Add Requisitioners

1. Click "**Add Assignees**" button
2. Enter first few letters of last name in sub-window
3. Click "**Search**" button
4. Click radio-button on line of approver to be selected

5. Click “Choose Selected User” button

2.2.2 Delete Requisitioner

1. Click “**Delete**” button on line of requisitioner to be deleted

2.2.3 Select default Requisitioner

1. Click “**Preferred**” radio-button on line of the person you want as your default requisitioner

2.3 Add Ship To/Bill To Addresses

Objective: To add, change and delete shipping and billing addresses and to select a default shipping and billing address in the Purchasing section of My Profile.

Key Points:

- Include room number and any other information needed for delivery personnel.
- If a building address is not available for selection, contact your business officer.

Ship To:

1. Click “**My Profile**” on Menu Bar
2. Click “**Purchasing**” tab
3. Click “ **Bill To/Ship To Addresses”** on sub-window menu bar
4. Click “**Ship To**” tab

2.3.1 Add a new shipping address

1. Click “**Select Addresses for Profile**” button
2. Enter your department number in the Address Search box.
3. Click **Search**.
4. Choose the radio button next to the appropriate address.
5. Enter your name in the **Attn:** field
6. Enter the **Fl/Rm/Ste**: information
7. Click “**Save**” button

2.3.2 Review and update previously selected shipping address information

1. Click on shipping address to select in “**Shipping Addresses**” window
2. Enter **Fl/Rm/Ste:** information.
3. Click “**Save**” button

2.3.3 Delete shipping address

1. Click on shipping address to select in “**Shipping Addresses**” window
2. Click “**Delete Address**” button

2.3.4 Select default shipping address

1. Click on shipping address to select in “**Shipping Address**” window
2. Click “**Default**” box
3. Click “**Save**” button

Bill To:

1. Click “**My Profile**” on Menu Bar
2. Click “**Purchasing**” tab
3. Click “ **BillTo/Ship To Addresses”** on sub-window menu bar
4. Click “**Bill To**” tab

2.3.5 Add a new billing address

1. Click “**Select Addresses for Profile**” button
2. Enter your department number in the Address Search box.
3. Click **Search**.
4. Choose the radio button next to the appropriate address.
5. Enter your name in the **Attn:** field
6. Enter the **Fl/Rm/Ste:** information
7. Click “**Save**” button

2.3.6 Review and update previously selected billing address information

1. Click on billing address to select in “**Billing Addresses**” window
2. Enter **Fl/Rm/Ste:** information.
3. Click “**Save**” button

2.3.7 Delete billing address

1. Click on billing address to select in “**Billing Addresses**” window
2. Click “**Delete Address**” button

2.3.8 Select default billing address

1. Click on shipping address to select in “**Billing Address**” window
2. Click “**Default**” box
3. Click “**Save**” button

2.4 Add Clemson Accounting Codes

Objective: To understand the proper use of charging instructions and learn how to maintain your list of Accounting Codes in your profile.

2.4.1 Add Accounting Codes to your Profile

1. Click "**My Profile**" on Menu Bar
2. Click "**Purchasing**" tab
3. Click "**Custom Fields"** on sub-window menu bar
4. Click "**Accounting Codes**" tab on menu bar.
5. Click "**Edit**" button on custom field name line for the Account, Class, Dept, Program, Project or Fund you wish to create a default for
6. Click "**Create New Value**" button
7. Enter the number in the "**Field Name Value**" field in the "**Search for Value**" window
8. Click "**Search**"
7. Click "**Select**" box next to the appropriate value
8. Click "**Add Values**" button
9. Click "**Close**" button

2.4.2 Delete Accounting Codes

1. Click "**Edit**" button on custom field name line
2. Click on custom field name to be deleted
3. Click "**Remove**" button in "Edit Existing Value" window
4. Click "**Close**" button

2.4.3 Select default Accounting Code

1. Click "**Edit**" button on custom field name line
2. Click on custom field name you want to be your default
3. Click "**default**" box in "Edit Existing Value" window
4. Click "**Save**" button
5. Click "**Close**" button

2.5 Add Email Notifications

Objective: To establish settings in buyWays to automatically receive email notifications regarding the status of your requisitions and purchase orders.

Key Points:

- As a new user, opt to have more email notifications sent rather than less to keep you informed.
- As time progresses, deselect any email types that you do not find helpful.
- Remember that you can link directly to the requisition or purchase order in question from these emails.
- Procurement has created default notifications already based on your role in buyWays. DO NOT attempt to turn off notifications if you do not know the impact of doing so, as it may result in delays in placing orders and/or paying vendors.

Scenario: Select email preferences that will notify you as a Shopper/Requisitioner when either your individual purchase requisition lines or entire purchase order is rejected by an approver and, when your purchase order is sent to the supplier. (Approvers can additionally opt to have an email sent to them that informs them when a requisition is pending their action.)

1. Click "**My Profile**" on Menu Bar
2. Click "**User Settings**" tab
3. Click "**Email Preferences**" on sub-window menu bar
4. Click check box on each line where email notifications are needed

   Select "**PR Pending Workflow Approval**" … (sends email to approvers informing them of a requisition pending their action)

   Select "**PR Line Items Rejected**" … (sends to requisitioner)

   Select "**PO Line Items Rejected**" … (sends to requisitioner)

   Select "**PO Sent to Supplier**" … (sends to requisitioner)

   Select "**PO Line Item Backorder notice**" for suppliers with the technical capability such as VWR (sends emails to Requisitioner if item is on backorder)

   Select or De-select any other preferences

   13. Click "**Save**" button

3 SEARCHING FOR ITEMS – SEARCH BASICS

Objective: To explore three basic methods for locating products in buyWays based upon supplier type: Hosted Catalog, Punch Out Catalog and Non-Catalog. The type of supplier you select will influence the manner in which you search for products and process your order in buyWays.

Note: All buyWays suppliers are already active in our PeopleSoft supplier database so using these suppliers means that there is no additional work on the part of the user to set up a supplier before placing an order.

Hosted Catalog Suppliers

The majority of the suppliers found in buyWays are Hosted Catalog Suppliers. These suppliers have provided Clemson with their electronic catalogs which contain negotiated Clemson prices and/or terms. When viewing search results from the catalogs, shoppers are assisted by icons that identify preferred suppliers and contract suppliers.

Users may quickly search through these hosted catalogs using the single-line search option located at the top of the page for Product Search. (See Appendix 3a.) In the following modules in this section, we will demonstrate advanced searching techniques.

Punch Out Catalog Suppliers

Suppliers who have provided a hyperlink to their online catalog with Clemson rather than provide their products through the shared Hosted Catalog are known as Punch Out Suppliers. Typically, these are vendors for products where only one university contract exists or where products often require custom configuration (e.g., Dell computers). Several of these suppliers have been available for online shopping through the specialized Clemson sites so searching in these catalogs may be familiar.

Users may shop through these catalogs by clicking on the Supplier's company logo in the Punch Out Catalog section of buyWays and select desired items from the external catalog which will add the products to the buyWays Shopping Cart. The Checkout process is completed in buyWays. See Section 4 for more details.

Non-Catalog Suppliers

The remaining suppliers in buyWays are known as Non-Catalog Suppliers. Orders are placed to these suppliers in buyWays in a variety of circumstances. For example, an online catalog may be unavailable for that vendor in buyWays or a particular item from a Hosted Catalog supplier is not available in the online catalog.

Users may requisition for products using the Non-Catalog form option in buyWays. See Section 4.2 for more details. Please note that this form is simply a mechanism for placing a non-catalog item in your shopping cart. The checkout process is identical to hosted catalog and external catalog items.

3.1 Search Hosted Catalogs

3.1.1 Search Hosted Catalogs by Product

Objective: To find products in buyWays' hosted catalogs by searching the product description using Advanced Search Options.

Key Points:

- One of the most powerful features of buyWays is its robust search engine that allows you to search online catalogs for goods and services using a variety of search techniques.
- Searching is quick – use different search argument combinations and compare results.
- Product search results are returned showing the best value first.
- Try phrasing your search in different ways and notice how the results differ.
- Avoid using plurals in search arguments (enter "beaker" not "beakers").
- In addition to Search Results, you can refine and filter your search. On the left side of the screen, notice you can refine and filter by keywords, by supplier, by category, or by packaging unit of measure

Scenario: Search for and identify the lowest-priced item.

1. From the buyWays home page, click on the **shop** link in the top navigation.
2. Enter an item description such as "beaker" in the Shop bar text box.
3. Enter (or) click "**Go**" button
4. In the Refine and Filter Search, add keyword "glass"
5. Enter (or) click "**Go**" button

3.1.2 Search Hosted Catalogs by Supplier

Objective: To find products in buyWays' hosted catalogs by searching by supplier using Advanced Search Options.

Key Points:

- A drawback of browsing by supplier is that it does not allow you to see comparable products from other vendors. Consider limiting its use to when you are searching for a previously purchased item from a specific vendor.

Scenario: Search for a product from USA Scientific.

1. Click "**Advanced Search**" button next to the Shop bar at the top.
2. Type "**USA**" in "**Supplier Name**"
3. Type "**beaker**" in search bar; "all of these words"
4. Click "**Search**" button

or

1.Type "**beaker**" in search bar
2. Enter (or) click "**Go**" button
3. In **Refine and Filter Search** bar on left hand side, select the **USA Scientific** under "**by supplier**"

3.1.3 Search Hosted Catalogs by Category

Objective: To find products in buyWays' hosted catalogs by drilling down to a category (commodity grouping) to a specific item using Advanced Search Options.

Scenario: Search for 125ml separatory funnel.

1. Type "**125ml funnel**" in the Shop bar text box.
2. In the Refine and Filter Search, under "**by Category**" choose "**more…**"
3. Chose "**Separatory funnels**" to display results
4. Identify the 125ml separatory funnel you want
5. Select "**Add to Cart**"

3.1.4 Search Hosted Catalogs by SKU ('Quick Order)

Objective: To search quickly for an item where the SKU is already known.

Key Points:

Search in Hosted Catalog by SKU ('Quick Order):

- Searches both the supplier and manufacturer (where provided by the supplier) catalog numbers.
- If the catalog number entered is an exact match to a product in the hosted catalogs and there is only one match, the product is automatically added to the shopping cart. If more than one product is found, Search Results are presented to allow for the selection of the appropriate product.
- If no products are found for the entered catalog number, a link to the non-catalog form appears. Select this link to create a non-catalog request for this catalog number. Optionally, you can search based upon Item Description to locate a comparable item in the hosted catalog.

Scenario: Using the Quick Order approach, place the following three items in your cart – 90094285, 11310-844, and 14100507.

1. **Click 'Quick Order'** next to "jump to".
2. **Enter the catalog numbers in three of the five fields provided -** 90094285, 11310-844, and 14100507**.** (Add to Cart Confirmation pops up below the Quick Order box.) Note: You are only searching Hosted Catalogs. If you enter a part number that is from a Punch Out Supplier, the item will not be returned in the search.

Tip: If the exact catalog number is not known, select the 'Include similar terms' checkbox. The search engine will try to find products with catalog numbers that are similar to the one entered. This check box is retained by the system for all future searches and must be explicitly turned off to disable this type of searching.

3.2 Search Punch-Out Catalogs

3.2.1 Search for Computers (Apple)

Objective: To select items from a Punch-Out catalog where you connect to the supplier's external site from buyWays and automatically return to buyWays to complete your order.

Key Points:

- Requisition lines from external catalogs can be included with other requisition lines from other suppliers.
- When returning to buyWays, it is recommended that you do not go back out to the same external catalog to modify the purchase. This may pose a risk that items from the supplier are duplicated.

Scenario: Select a computer from Apple.

1. Click the Apple logo in the Punch-Out Catalog area. (Screen indicates "Connecting to Punch out. Please wait.")
2. Select the system you want to purchase – click "**add to cart**"
3. Click "**Continue**" to review your cart.
4. Click "**Check out"**
5. Click "**Continue**"
6. Click "**Return to Procurement Application**" (You are automatically returned to buyWays)

3.2.2 Search Punch-Out Suppliers - Laboratory Supplies

Objective: To select items from a Punch-Out catalog where you connect to the vendor's external site from buyWays and automatically return to buyWays to complete your order.

Key Points:

- Requisition lines from external catalogs can be intermixed with other requisition lines.
- When returning to buyWays, it is recommended that you do not go back out to the same external catalog to modify the purchase. If you do, be sure to review details and check to see that you do not have duplicate products purchased in error.

Scenario: Select a Sulfuric Acid for Babcock Milk Test from Fisher Scientific.

1. Click "Fisher" logo in "External Catalog" area (Screen indicates "Connecting to Punch out. Please wait.")
2. Click "Browse by Product"
3. Click " Filtration under "Consumables and Supplies"
4. Click "Fisher brand Fluted Qualitative Circles"
5. Add quantity and Click "Add to Cart"
6. Click "View Shopping Cart"
7. Click "**Check out Shopping Cart**" (you are automatically returned to buyWays)

3.2.3 Search External Suppliers - MRO/Facilities (Grainger)

Objective: To select items from an external catalog where you connect to the vendor's external site from buyWays and automatically return to buyWays to complete your order.

Key Points:

- Requisition lines from external catalogs can be intermixed with other requisition lines.
- When returning to buyWays, it is recommended that you do not go back out to the same external catalog to modify the purchase. If you do, be sure to review details and check to see that you do not have duplicate products purchased in error.

Scenario: Select floodlights from Grainger.

1. Click "**Grainger**" logo in "External Catalog" area (screen indicates "Connecting to Punch out. Please wait.")
2. Enter "**floodlight**" in the Search field on the Grainger home page
3. Select a category of floodlights to display list of products
4. Enter quantity in line of item you desire
5. Click "**Add to Requisition**" button
6. Click on the cart logo in the upper right hand corner of the punch out page.
7. Click " **Continue**" button
8. Click " **Submit Requisition**" button (you are automatically returned to buyWays)

3.2.4 Search External Suppliers - Office Supplies (OfficeMax)

Objective: To select items from an external catalog where you connect to the vendor's external site from buyWays and automatically return to buyWays to complete your order.

Key Points:

- Requisition lines from external catalogs can be intermixed with other requisition lines.
- When returning to buyWays, it is recommended that you do not go back out to the same external catalog to modify the purchase. If you do, be sure to review details and check to see that you do not have duplicate products purchased in error.

Scenario: Select a case of recycled copy paper from OfficeMax.

1. Click "**OfficeMax**" logo in "External Catalog" area (screen indicates "Connecting to Punch out. Please wait.")
2. Click on "Create New Office Product Order"

3. Type in "recycled paper" in the search field, click "GO".
4. Click on Copy and Multi-Use Paper to narrow your results by category.
5. Click on "**multi-use copy paper"** to narrow results further.
6. Add the quantity of paper and click "Add to Cart".
7. Click "Check Out" (automatically returns you to buyWays where you will complete the ordering process).

4 ORDER BASICS

4.1 Hosted and Catalog Orders

Objective: To illustrate the full requisition process, from searching for a product, to placing an order.

Key Points:

- Changes can be made at each step if needed.
- When you have located the products that you wish to purchase, you can add the products to your cart by clicking on shopping cart rather than select "Add to Current Cart" and click "Go".
- Notice how your "Active Cart" updates with item total and dollar amount total.
- In the scenario below, items are added using the product search results which is just one of several methods of adding an item to a Cart. Other methods include product details pop-up, product comparison, Favorites, Fast Order, Non-Catalog Order form and completed requisitions.

Scenario: Search for and purchase a lamp ballast. Before you have completed the order, change the quantity from 1 to 5 ballasts and then place your order.

1. Enter "**99538350**" in the shop all space. You already know the part number.
2. Enter (or) click "**Go**" button
3. Quantity of 1 is pre-populated.
4. Click "**Add to Cart**"
5. Click Cart icon in the upper right hand corner of the screen.
6. Enter "**5**" in quantity on "**lamp ballasts"** line
7. Click "**Save Updates**" icon (optional – displays updated cost)
8. Click "**Step 2**- **Review Address/Accounting Info**" step. Review profile defaults for accuracy.
9. Click "**Req Approvals (VIEW ONLY)**"
10. Click "**Submit Req for Approvals" or "Assign Cart to Requisitioner"**

4.1.1 Remove Items from Cart

Objective: To remove an unneeded line in your cart.

Key Points:

- Remove as many lines as necessary.
- After a line is removed, it cannot be restored. You can select other items to add to the cart by clicking 'Add Products.'

- Removing all lines will result in an empty cart but the cart remains active.
- Note that the entire cart can be deleted where all lines are removed and the cart itself is deleted. This is covered in the 'Delete Cart' module.

Scenario: Remove a line from your cart.

1. Click "**Active Cart**"
2. Click open box to the right of the price (on the first line)
3. From the drop down menu of **"For Selected Line Items"** to the right, Select "**Remove Selected Items**"
4. Click "**Go**"
5. Click **"PO Preview"** step to continue requisition process

4.1.2 Change Product Quantity

Objective: To change the quantity of a product ordered after it is in your current cart.

Key Points:

- Purchase Flow icons at the top of the screen depict full requisition process moving from "Add Products" to "Place Order".
- You can click "Save Update" button or icon on the Purchase Flow.
- Hosted catalog items are changed directly through your Cart. However, External Catalog (punch-out) items are updated by returning to the supplier's site.

Scenario: Change an order of 5 lamp ballasts to 10 lamp ballasts

1 Click "**Active Cart**" (review the summary screen)
2. Enter "**10**" in Quantity (changing from 5 to 10)
3. Click "**Save**" (quantity and amount in active cart updated)

4.1.3 Change Address

Objective: To override your default ship-to address with a new address for all lines in your requisition.

Key Points:

- If your ship-to profile is current and complete, this is normally all that is needed to change a ship-to address.
- Deliver-to department, building, room, attention and contact phone can be changed on your requisition if needed. For example, you may place an order for delivery to a different person in a different location.
- Changes can be made to all lines or only on individual lines by using the "Edit" button on the line.
- Use View/Edit by line item to change the Ship To for individual lines.

Scenario: Change address in your requisition on all lines to a new address.

1. Click **Cart** icon to open an active cart
2. Click "**Review Address/Accounting Info" step in process flow.**
3. Click "**Edit**" button next to Ship To
4. Select an address **from Clemson addresses or select profile value**

5. Modify **Attn:** and add **Fl/Rm/Ste:**
7. Click "**Save**" button

4.1.4 Change Chartfield Information (Account, Fund, Dept, Program, Class, Project)

Objective: When reviewing details of a requisition you are creating, you can override your default Accounting Codes for any of the lines in your requisition.

Key Points:

- Changes can be made to all lines or to individual lines.
- There is a note beneath each line item that indicates whether the charging instructions are the same or differ from the purchase requisition header's charging instructions.

Scenario: Change default Account Code on all lines of a requisition.*

1. Click on **"Cart"** icon to open an active cart
2. Click on "**Review Address/Accounting Info**" (step #2 at the top)
3. Click "**Edit**" button in Accounting Codes area
4. Beneath the Account, Fund, Dept, Program, Class and Project field, click on "**Select a CU value"** to locate a number not already in your profile.
5. Click on **Select** button next to Account Code result to enter number
6. Click **Save** button

*****To edit account codes for an individual line, begin by clicking on "**View/edit by line item"** at the bottom of the Accounting Codes area, then click **Edit** button on line beneath item description. Continue with Step 4 above.

4.1.5 Split Accounting Codes

Objective: To allocate the costs of an item(s) between two or more accounts.

Key Points:

- Confirm the split when you return to Review Details.

Scenario: Split the charge of a purchase by applying 25%of the purchase to one account and 75% to another account for all line items on a requisition

1. Click "**Cart**" icon to open an active cart
2. Click "**ReviewAddress/Accounting Info**" (step #2 at the top)
3. Click "**Edit**" button in Accounting Codes area
4. Click "**add split**" link
5. Select **"% of Qty**" or **"% of Price**" split option from drop-down menu
6. Click "**Select from profile values"** or **"Select a CU value**" link to select Accounting codes.
7. Enter account number value or description and click "**Search**"
8. Click "**Select**" next to desired account number.
9. Enter "**25"** in split amount field
10. Repeat search for next accounting code
11. Enter "**75"** in split amount field
12. Click "**Save**" button
13. Confirm that the changes are applied as desired by reviewing the accounting codes on the line items below.

4.1.6 Add Internal Notes

Objective: To attach internal notes, attach documents, link to documents and provide URL links from your desktop to provide additional information to an approver.

Key Points:

- You can attach internal notes, attach documents, link to documents and provide URL links from your desktop. For example, use this feature to attach Single/Sole Source Justification or competitive quotes for Clemson record retention purposes. Also, use to send notes to your Approver stating the business purpose of your order, etc.
- Internal Notes are not sent to the supplier. If you intend to send notes or attachments to the supplier, use the External Notes and Attachments area at either the line or header level.

Scenario: Add an internal note saying "special request for Dr Smith." Notes are added once a Cart is created.

1. Click on a **Cart** containing items to be purchased.
2. Click "**Review Address/Accounting Info**" workflow step #2 at the top.
3. Click "**Edit**" button link under "**Internal Notes and Attachments**"
4. In Internal Note dialog box, type "**Special request for Dr Smith**"
5. Click "**Save**" button

4.1.7 Add Notes to Supplier (External Notes)

Objective: To attach notes to provide additional information to the supplier.

Key Points:

- You can attach notes to supplier in the Notes to Supplier field in the "External Notes and Attachments" area viewable from the Review Address/Accounting Info step.
- If you do not want a note to be seen by the supplier, use an Internal Note, to limit access to Clemson employees only.

Scenario: Add a note saying "Customer number 123456789." Notes are added once a Cart is created.

1. Click on a **Cart** containing items to be purchased.
2. Click "**Review Address/Accounting Info**" (workflow step # 2 at the top).
3. In the External Notes and Attachments dialog box, click "**Edit**" button.
4. Type "**customer number 123456789**"
5. Click "**Save**" button

4.2 Non-Catalog Orders

Objective: Use the Non-Catalog form to purchase an item that cannot be located in a catalog (either hosted or punch- out).

Key Points:

- With non-catalog purchases, always provide as much information as possible to explicitly describe your need to the supplier, including accurate pricing and product numbers.
- Attach quotes when available and include the quote number in the description.
- Required fields are in bold.
- Note: Non-catalog requests <$2500 will go straight to the supplier after all departmental approvals are completed. They will not stop in Procurement Services for approval. (See Appendix 4.)
- For best results in quickly approving requisitions, it is good to use separate requisitions from your catalog requests for your non-catalog requests.

Scenario: In this scenario, purchase a reagent for $210 from Invitrogen.

1. Click "**Non-Catalog Form**" from Clemson Forms tab of home page
2. Click "**Supplier Search**" link in Supplier Info dialog box
3. In **Supplier Name** field, enter '**Invit"** and click **"Search"** button
4. Click "**Select"** radio button next to Fulfillment Address #2"
5. Enter **product name and description** (for this example you can create one)
6. Enter quantity – "**1**"
7. Enter price estimate - "**210**"
8. Select "**Add and go to Cart" NOTE**: Use **"Add to Cart and Return"** if you plan to order another line item from the same supplier, or "Add to Cart" to add this item to cart and leave all field filled in to allow for easily adding another similar item (i.e. good for adding multiple items with slightly different part numbers or descriptions).

11. Click "**Go**" button
12. Click "**Review Address/Accounting Info**" icon to continue through steps to process requisition

5 APPROVING ORDERS

5.1 Approve a Requisition

Objective: To review and approve requisitions that others submit to you verifying the accounting codes and the shipping address. (See Appendix 5.)

Key Points:

- As you review a requisition, you may edit any data that requires correction, such as accounting codes or shipping information.
- You can approve one or more line items and reject others as necessary.

Scenario: Review and determine that no changes are needed to a requisition that is pending your approval. Approve the requisition.

1. From **home/shop page**, in **My Dashboard**, click "**View my approvals**", or click "**My Approvals**" tab at top of page
2. In list of requisitions pending your review and approval, click the **Requisition Number** link
3. Review the items, ship to address, Accounting Codes, Internal and External Notes, etc. – **Edit** as necessary
4. Select "**Approve/Complete Step**" in the Available Actions drop-down menu, to the right
5. Click "**Go**" – approval step complete

5.2 Reject a Requisition

Objective: To reject requisitions that others submit to you that you deem not appropriate.

Key Points:

- As you review a requisition, you may edit any data that requires correction, such as accounting codes or shipping information. You can reject any or all lines on the requisition. Lines that you don't reject will be approved and included on a purchase order that will be transmitted to the supplier.
- If there are different reasons for rejecting items, you can reject lines in different groups and enter different reasons for rejection
- You can un-reject lines that you have previously rejected prior to selecting "**Approve/Complete Step**".
- Departments may want to adopt conventions for rejection reasons.

Scenario: Review and reject a requisition that is pending your approval.

1. From **home/shop page**, in **My Dashboard**, click "**View my approvals**", or click "**My Approvals**" tab at top of page
2. In list of requisitions pending your review and approval, click the **Requisition Number** link
3. Click "**Summary**" tab
4. Click check-box on line items to be rejected
5. Select "**Reject Selected Items**" in the action drop-down menu

6. Click "**Go**"
7. "**Reject Line Reason**" box appears
8. Type in your reason for rejecting the item(s)
9. Click "**Reject Line Items**" button
10. Click "**Go**"
11. Select "**Approve/Complete Step**" in the "**Available Actions**" drop-down menu (upper right)
12. Click "**Go**" – approval step complete

5.3 Change a Requisition

Objective: To edit requisitions that others submit to you to improve order accuracy.

Key Points:

- As you review a requisition, you may edit any data that requires correction, such as accounting codes or shipping information.
- You can reject any or all lines on a submitted requisition.
- Lines that you don't reject will be approved and included on a purchase order that will be transmitted to the supplier.

Scenario: Review and edit a requisition that is pending your approval.

1. From **home/shop page**, in **My Dashboard**, click "**View my approvals**", or click "**My Approvals**" tab at top of page
2. In list of requisitions pending your review and approval, click the **Requisition Number**
3. Click "**Edit**" button next to Ship To in Shipping dialog box
4. Review and edit address and/or contact information as needed (Click "**Save**" when complete.)
5. Click "**Edit**" button in Accounting Codes dialog box
6. Review and edit **Internal and External Notes and Attachments** as needed. (Click "Save" when complete).
7. Click "**History**" tab (note that your name, the action you took and the original and new accounting codes are displayed)
8. Select "**Approve/Complete Step**" in the "**Available Actions**" drop-down menu (upper right)
9. Click "**Go**"

5.4 Forward a Requisition

Objective: To forward a requisition on to another individual for their review and/or approval or rejection.

Key Points:

- Approvers can approve one or more of the line items remaining and reject others as needed.

Scenario: Forward a requisition that is pending your approval to another individual.

1. From **home/shop page**, in **My Dashboard**, click "**View my approvals**", or click "**My Approvals**" tab at top of page
2. In list of requisitions pending your review and approval, click the **Requisition Number**
3. Click "**Summary**" tab
4. Select "**Assign to Myself**" in the "**Available Actions**" drop-down menu (upper right)
5. Select "**Forward to**" in the "**Available Actions**" drop-down menu (upper right) (note that when you forward any rejected items will be permanently removed and cannot be "**un-rejected**" by you or the person the requisition is being forwarded to)
6. Click "**Go**"
7. Enter the first two letters of the persons last name that you are forwarding to in "**Last Name**"
8. Click "**Search**"
9. Click radio button next to person desired
10. Click "**Choose Selected User**" button
11. Type in an explanation message for the person you are forwarding requisition to
12. Click "**Forward**" button

5.5 Assign a Substitute Approver for Planned Absence

Objective: To temporarily delegate your requisition approval responsibilities to another individual.

Key Points:

- Requisitions requiring approval after assigning your substitute will go directly to your substitute's folder instead of yours.

Scenario: Assign your approval privileges to a designee to approve requisitions in your absence.

1. From **home/shop page**, in **My Dashboard**, click "**View my approvals**", or click "**My Approvals**" tab at top of page
2. Click on '**Assign Substitute'** link in brackets above dialog box (generates a search box)
3. Enter search criteria and click **Search** button to locate the individual you wish to approve on your behalf.
4. Click on radio button to select substitute approver and then click on '**Choose Selected User**.' (your substitute's name now shows on your PR approval folder screen)

Note: To end substitution, click on 'End Substitute' when you return.

6 TRACKING ORDERS

6.1 Find an Order

Objective: To find a previously created requisition or purchase order by a number of criteria. Depending on permissions granted by your business officer, you may view requisitions you created, those created by others in your department, or others throughout the University.

Key Points:

- You can search across requisitions or only orders that have reached purchase order status.
- You can search by requisition name, requisition number, supplier name or catalog SKU number.
- You can search within any date range.
- You can search by requisitioner, shopper, approver, or department entering the requisition.
- You can search by account code, department, project, or fund.
- You can screen by organizations within your department where applicable.
- You can screen by requisition status criteria such as "completed", pending" etc.

Scenario: Locate a requisition by date.

1. Click "**search history**" tab on home page
2. Click "**requisition history**" menu tab in upper-left corner of screen
3. Click "**by Requisition**"
4. Click "**Filter**" checkbox
5. Click "**My Orders**" radio button Click "**Start Date**" calendar icon
6. Go back one month and click on the first day of that month
7. Click "**Search**" button
8. Click on **Requisition Number**
9. View the summary, detail, approval status or history and add notes to history, if needed

Note, using the searches available on the "**search history**" tab, users are able to search by endless combinations of search criteria for both requisitions and POs. Become familiar with the various sub tabs (i.e. "**PO history**", "**invoice history**", "**by supplier / SKU**", etc).

Also note the difference between searching by "**Originating Department**" and "**dept**" number. The "**Originating Department**" will search by the department of the shopper originating the order. Searching by "**dept**" number will search by the department an order is being charged to. Using a combination of all "**Originating Departments**" but your own and then your own "**dept**" number will give you results of orders placed by other departments but being charged to your own department.

6.2 Withdraw a Line

Objective: To withdraw a requisition line that was submitted in error.

Key Points:

- Once an item is withdrawn, it cannot be reinstated.
- Withdrawing a line does not delete the requisition.
- You cannot withdraw a requisition line after it's been approved and becomes part of a purchase order. If you recognize an error after it's been sent to the vendor, contact the vendor to cancel the line. Also, submit a Change Order Request form in buyWays so the order can be cancelled in both buyWays and PeopleSoft. (See 'Change Order Request' form.)
- See the drop-down menu in the upper right hand corner – you can add notes to the history of the requisition if needed.

Scenario: To withdraw one or more items on a requisition previously submitted for approval.

1. Click "**My Requisitions**" link on home page, or under "**search history**" click the "**my requisitions**" tab
2. Click on **Requisition Number** (Requisition Summary appears.)
3. Select one or more items to withdraw by clicking checkbox beside the price of item
4. Select "**Withdraw Selected Items**" in the action drop-down menu (above line items)
5. Click "**Go**" button to withdraw the item
6. The message appears that once a line is withdrawn it cannot be reinstated
7. Click "**OK**"
8. "**Withdraw Message**" box appears
9. Type in your reason for withdrawing the item
10. Click "**Withdraw Line Items**" button

6.3 Withdraw a Requisition

Objective: To withdraw entire requisition from an approver when items ordered are no longer needed or your designated approver is out of the office.

Key Points:

- Once a requisition is withdrawn, it cannot be reinstated. However, once withdrawn, you can use the 'Copy to Cart' action and click Go. This creates a new cart containing all items and characteristics (e.g., quantity, charging instructions, etc.) of the previously withdrawn requisition. You can then modify the requisition and resubmit it to the same or different approver.
- See the upper left-hand action drop-down menu – you can add notes to the history of this requisition if needed.

Scenario: Locate and withdraw a requisition that has been submitted to an approver.

1. Click "**My Requisitions**" link on home page "**Review**" box
2. Click "**Requisition Number**"

3. Click “**Req Approvals (VIEW ONLY)**” tab to view the requisition’s current status in the approval workflow
4. Select “**Withdraw Entire Requisition**” in the “**Available Actions**” drop-down menu
5. Click “**Go**” button to withdraw the requisition
6. The message appears that once a requisition is withdrawn it cannot be reinstated
7. Click “**OK**”
8. “**Withdraw Entire Requisition Message**” box appears - type in your reason for withdrawing the requisition
9. Click “**Withdraw Entire Requisition**” button

6.4 View Requisition Approvals and History

Objective: To obtain order status/history information on your requisitions and their subsequent purchase orders. (See Appendix 6 for workflow stop points.)

Key Points:

- Viewing History will include modifications made by the approver to the original requisition.
- Use this feature to also determine history of Purchase Order.

Scenario: Locate a requisition and note its approval status.

1. Click “**My Requisition**” link on home page
2. Click **Requisition Number** (reveals ability to query details and approval status of requisition) .

3. Click “**Req Approvals (VIEW ONLY)**”, “**Comments**”, as well as “**History**.” (view action taken on order)

6.5 Cancel an Order

Call supplier directly to cancel your order, then

Submit a **'Change Order Request'** form to Procurement Services via buyWays:

1. On the **buyWays home page**, click on the **“Clemson forms”** tab.
2. Under **'Clemson Shared Folders**’ and ‘**Clemson Forms**’, open the **'Change Order Request**' form.
3. Follow detailed directions on the form for processing and submission and be sure to select “**Cancel PO**” from the **Type of Change** dropdown menu on the form.
4. Then, after submittal and approval of the form, the cancelation will be processed by Procurement Services in both buyWays and PeopleSoft.

Note, if you do not utilize this form to cancel an order, the order will not be canceled in both buyWays and PeopleSoft and may result in budget failure issues at a later date.

6.6 Who to Contact

For help with buyWays, please contact the buyWays Help Desk at cubuyways@clemson.edu phone: 656-5581.

For more information regarding buyWays, please go to http://www.clemson.edu/cfo/procurement/buyways.html

7 ORDERING EFFECTIVELY

7.1 Comparison Shopping

Objective: Explore the comparison feature that will help you in the product selection process.

Key Points:

- While using the comparison feature, you can sort by characteristics shown on the left such as supplier, category, and packaging UOM.
- While using the comparison feature, you can also sort results by using the sort by dropdown at the top of the search results to sort by price, best match, supplier, description, etc.
- After selecting products, you can go back to your search results or directly continue along the requisition process.
- 'More Info' provides additional details vendors have provided to the buyWays catalog. This often includes photos, detailed specifications and links to the vendor site.

Scenario: Compare several hybridization ovens.

1. Enter "**hybridization oven**" in the **Shop bar**
2. Click "**Go**"
3. Click "**Hybridization Ovens**" link under "**Refine and Filter Search**" and "**By Category**"
4. Click the "**compare"** link next to several ovens you wish to compare (note, a check mark will appear to the right of these items
5. Select "**Compare Selected**" bar at the top right of the search results
6. Click "**Price**" (Lowest price item appears in left-hand column. You can select any of the criteria that are comparable to sort by those specific criteria).
7. Click "**More Info**" at the bottom of product columns for details of items including photos when made available by supplier

7.2 Managing Favorites

7.2.1 Add/Delete Favorites

Objective: To eliminate the need to repeatedly search in hosted catalogs for a frequently purchased item, add item to a Favorites folder.

Key Points:

- Alias names can be given to products in your Favorites list. Your "order products from your Favorites list" will display the actual product name even though you have them identified with an alias.
- Favorites can be organized in folders and sub folders.
- Product prices are updated dynamically when ordered from Favorites.
- Periodically search for favorite items to see comparable new products across suppliers.
- Note that buyWays will not allow you to add a product to Favorites more than once in the same sub-folder with the same name.
- Note that items found in external catalogs will not be maintained in Favorites. See external supplier shopping features for this capability. (e.g. OfficeMax refers to this feature as 'Shopping Lists'.)

Scenario: Add a slide plate that is frequently purchased for Dr. Smith to your Favorites.

Add to Favorites

1. Enter "**slide plate**" in Shop bar
2. Click "**Go**"
3. For the item you wish to add as a favorite, select "**add favorite**"
4. A new screen pops up
5. Overwrite item nickname by typing "**Slide Plates** (Dr. Smith)"
6. Click "**Add Description**" if you wish to added details or more description
7. Click "**New"** to add a new favorite folder (if necessary)
8. Click on the appropriate favorite folder you wish to save this item under
9. Click "**Submit**" button
10. Click "**Close**" button

Note, you can also add forms to your Favorites by selecting a completed form and choosing "**Add to Favorites**" from the **Available Actions** drop-down menu for that form and then simply follow instructions above.

Delete from Favorites

1. Click "**Favorites**" tab on home page
2. Select appropriate folder and item
3. Click "**delete**" icon and "**OK**" in the confirming pop-up

7.2.2 Order from Favorites

Objective: To save time and effort by eliminating the need for repeat hosted catalog searches for items that you purchase frequently.

Key Points:

- Product prices are updated dynamically when ordered from Favorites.
- Periodically search for favorite items to see comparable new products across suppliers.
- Favorites can be organized in sub-folders.
- Note that buyWays will not allow you to add a product to Favorites more than once in the same sub-folder with the same name.

Scenario: Purchase a specific slide plate frequently ordered for Dr. Smith.

1. Click "**Favorites**" tab in search window
2. Click on "**Slide Plate (Dr. Smith)"** line
3. Click "**Add to Cart**" button
4. Click **Active Cart** to continue processing the order (Note that the alias "**Slide Plate (Dr. Smith)**" has been replaced with the actual product description.)

7.2.3 Using Sub-Folders in Favorites

Objective: To group your Favorites as you desire to help you to locate them more quickly when ordering.

Key Points:

- Alias names can be given to products in your Favorites list.
- In your order, products from your Favorites list will display the actual product name even though you have identified them with an alias.
- Product prices are updated dynamically when ordered from Favorites.
- Periodically search for Favorite items across suppliers to see comparable new products.
- Note that buyWays will not allow you to add a product to Favorites more than once in the same sub-folder with the same name.

Scenario: Set up a new folder called "**Lab Set-Up**" and see how existing favorites can be copied to and moved to the new sub-folder.

1. Click "**Favorites**" on home page
2. Click "**New**" button at upper left hand corner
3. Click on "**SubFolder of selected folder**"
4. Enter sub-folder name - "**Lab Set-Up**"
5. Click "**Save**" button
6. Select "**move / copy**" link on the item you want to copy or move
7. Select "**Lab Set-Up**" sub-folder
8. Click either "**move" or "copy"** button

7.3 Managing Carts

Objective: To improve order efficiency by setting up orders that are similar or that might be used later such as standing orders.

Key Points:

- You may create new carts whenever necessary. Additionally, you are able to create draft carts for future use.
- You may store as many draft carts as you need.
- Change default cart names to include your user id and date to ensure that the cart name is more meaningful and searchable for you in the future.
- You can rename carts along the way as you desire.

Scenario: Create a new cart and navigate through draft carts.

1. Go to the **My Carts** tab and click on **Create Cart** button (upper left).
2. Give the cart a meaningful cart name. Click **Save** button.
3. Search for and add a product to the cart.
4. Return to the **Carts** tab and create a second new cart. Give this cart a different cart name.
5. Click on **Draft Carts** to view each of the carts created. To make a different cart active, do one of the following:
    - • To change the current cart from one to another but remain in the drafts page, click on the **Cart** icon to select one cart as your Active Cart.
    - • To change the current cart from one to another and go to that cart, click on the **Shopping Cart** Name.

7.3.2 Copy to New Cart

Objective: To save time in locating previously ordered items, search for a previously created requisition and copy items to your current cart.

Key Points:

- When creating a new order from history, consider adding the product to your favorites for future reference.
- You can add a product to the in process requisition or automatically create a new requisition from history as shown here.
- This is also a useful feature when you wish to resubmit a requisition that was rejected by an approver to save time in reconstructing and revising your order. (See Appendix 7b.)

Scenario: Copy a requisition that is not pending approval to a New Cart.

1. Click "**search history**" link on home page
2. Click "**requisition history**" tab
3. Click "**by Requisition**"
4. Click "**Filter**" check-box
5. Click "**My Orders**"
6. Click "**Start Date**" calendar icon
7. Go back one month and click on the first day of that month

8. Click "**Search**" button
9. Click **Requisition Number** of a **Requisition** that is not still pending approval.
10. Review the requisition's "**Summary**" tab that lists items and quantity.
11. On the **Available Actions** menu, '**Copy to New Cart'** appears. Click **Go** to copy all requisition items to a new cart.
12. The copied items retain all characteristics (e.g., quantity, charging and shipping information) from the prior requisition. Edit the item details, including deleting those items not needed from the original.

**Note: You may not be able to copy a cart or items from a cart that were selected from a punch out. Those will have to be selected directly from the punch out itself, possibly by using the vendors "favorites" functionality if they have one.

7.3.3 Delete Cart

Objective: To discard an entire requisition before placing an order.

Key Points:

- When a cart has been deleted, it cannot be restored.
- Note that individual cart lines can be removed if you don't want to delete the entire draft requisition. This is covered in the 'Remove Items from Cart' module.

Scenario: Delete a cart.

1. Click "**My Carts**" on Menu Bar
2. Click "**Draft Carts**" on lower Menu Bar
3. Click "**Delete**" button to the right of the cart you wish to delete

APPENDICES

APPENDIX 1 Internet Explorer Browser Requirements

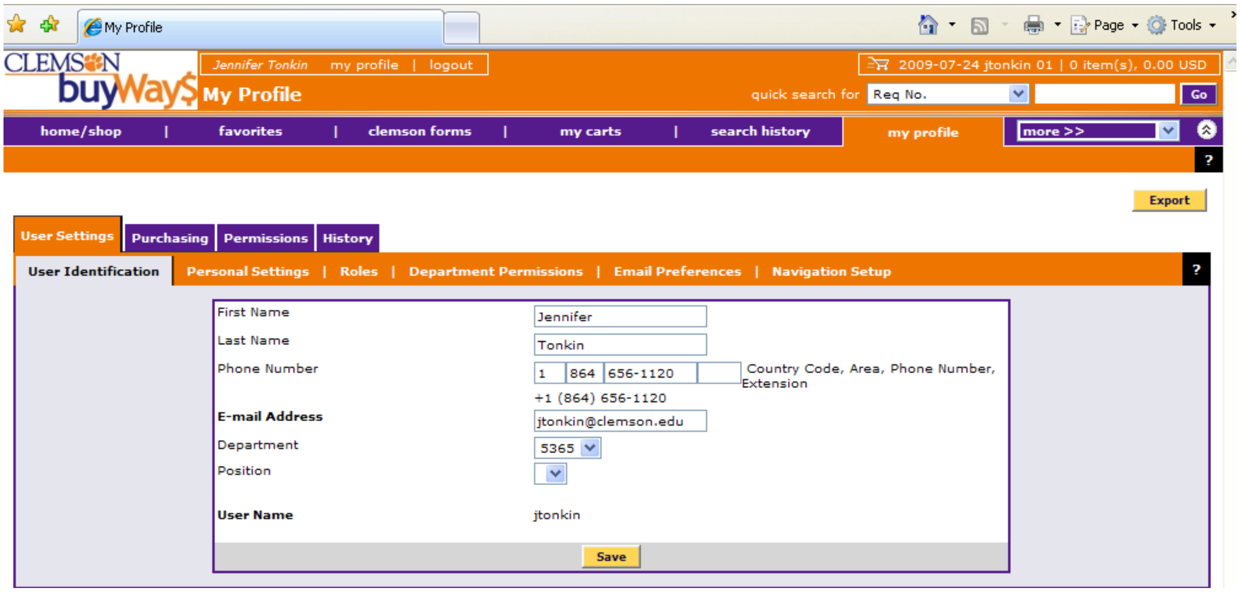
- Must be at Internet Explorer 5.5 or higher (6.0 or higher is preferred.) Mozilla/Firefox 3.0 or higher, Safari 3.2 or higher.
- Set Tools/Internet Options/Temporary Internet Files/Settings to 'Every visit to the page.'
- For Internet Explorer 6.0 and above, set Tools/Pop-up Blocker Settings to allow pop-ups from solutions.sciquest.com/org/clemson (If you have other pop-up blockers from plug-ins such as Google, those should be set as well.)
- Although Safari 3.0 and higher is supported by SciQuest, not all Supplier punchout sites support this browser.

APPENDIX 2a Role Options

All Clemson employees are defaulted as a shopper in buyWays. Some users are assigned as a Requisitioner, Approver, and/or Invoice Handler, per their budget center. Certain functionality within buyWays is set based on the role. Approval limits for purchasing is determined based on each department's preferences, and these limit preferences are reflected in the workflow for that department.

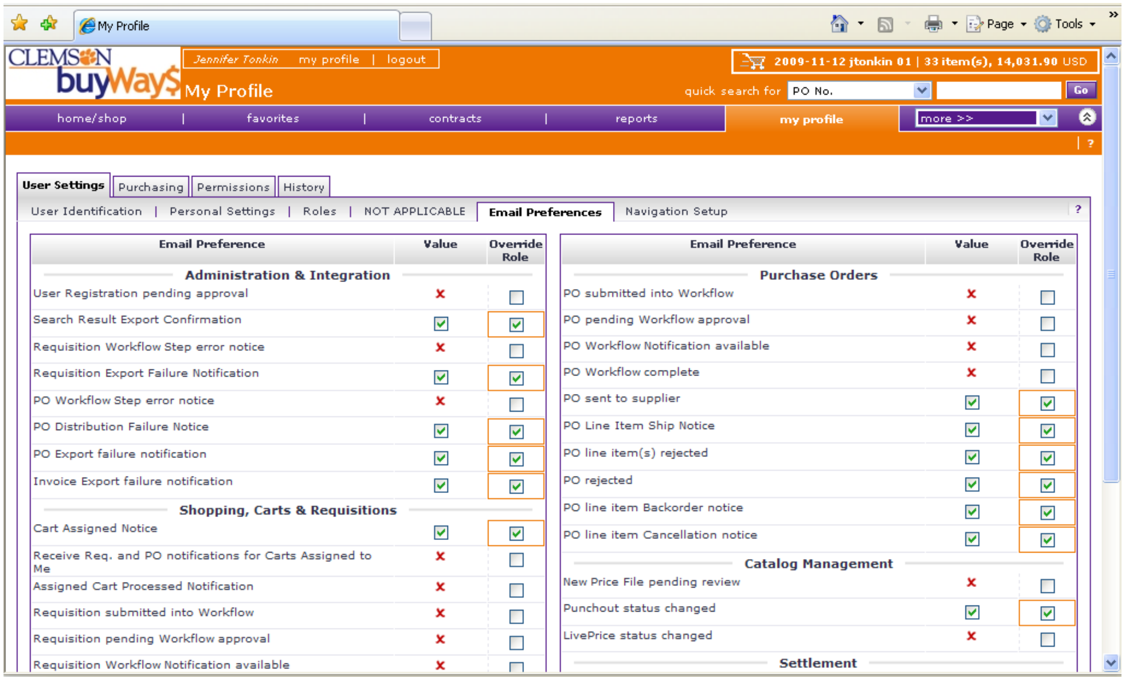
If a requisition is more than $2,500 and it is not on contract, an exempt purchase, or a Procurement Certification, it will be routed to Procurement for review and bidding as required by law. It will come to purchasing after a departmental approver, PI, and/or grants coordinator provides the financial approval.

APPENDIX 2b Profile Settings



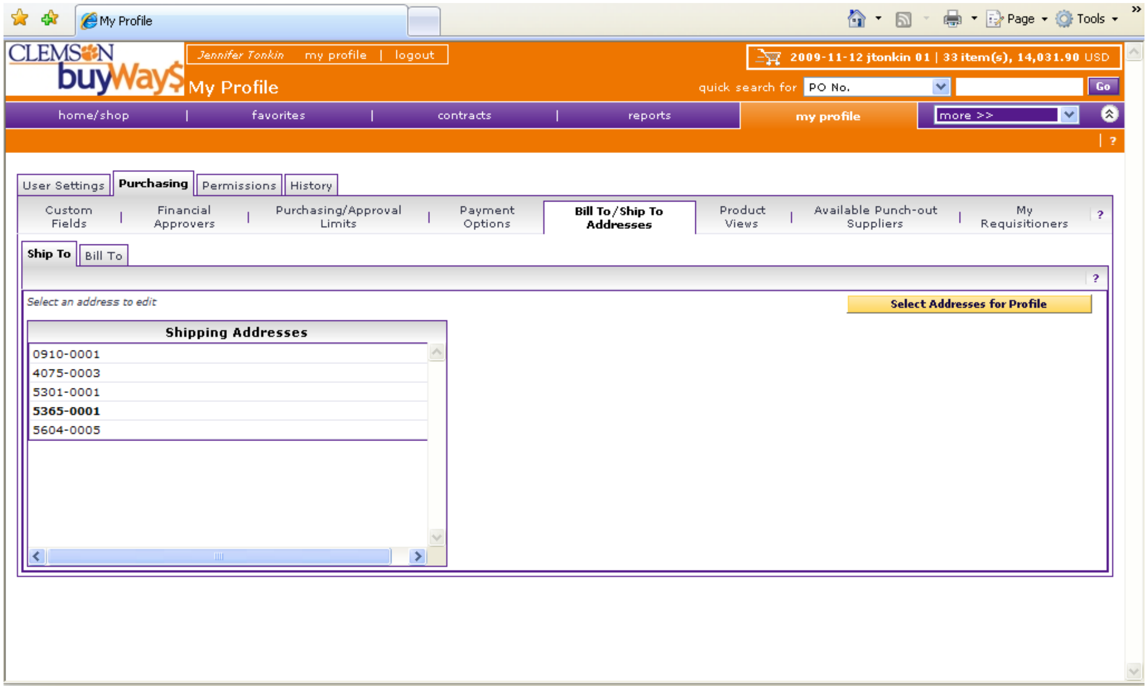
'My Profile' controls data and defaults available to you while creating buyWays requisitions. The various profile options are labeled 'May Edit' and 'View Only' to distinguish what you may change. Key items you may change under the *User Settings* tab are:

- ***User Identification***: Identifies your name, phone number and e-mail address as stored in PeopleSoft HR. You may want to change your name here if you're known by a first or last name different from what's shown.
- ***Color Settings***: Default color settings are blue and gray. You may want to experiment with other settings available to determine whether another color combination is easier for you to read.
- ***Email Preferences***: Enables you to identify at what points you receive e-mails in the workflow process. Recommended preferences are shown on the next page. Those with Approver roles will see more preferences available than those with Requestor roles. Unless you set your Email Preferences, you will not receive e-mails from buyWays. Email preferences are set by default based on role.



Recommended Email Preferences are:

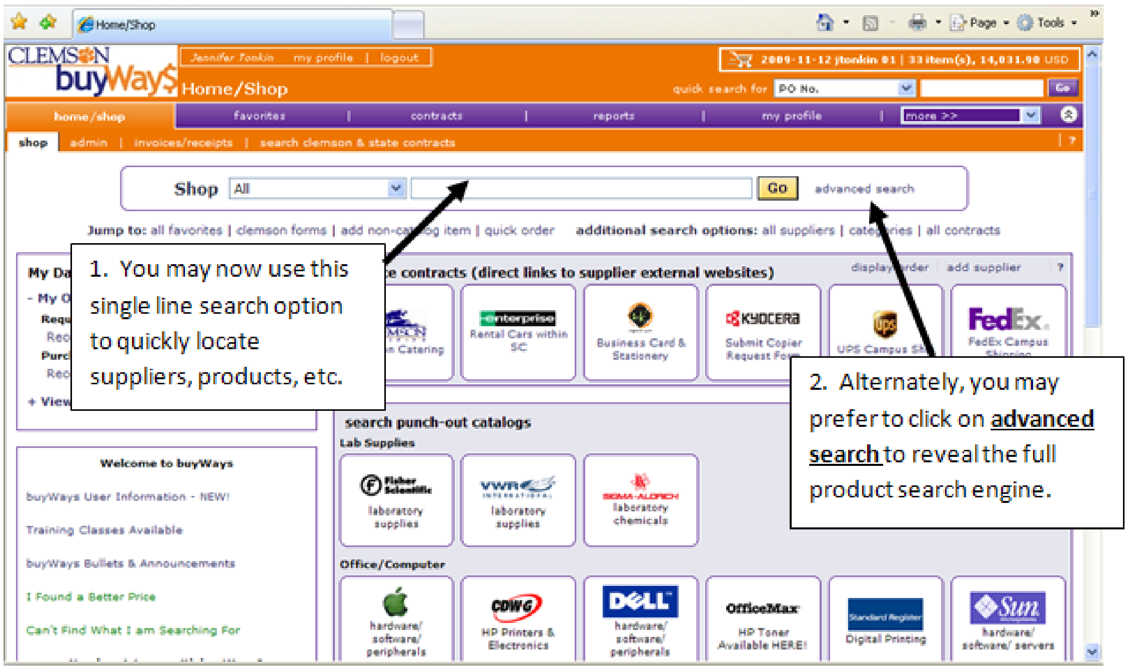
- ***PR pending Workflow approval***: For *Approvers only*, notifies approver that a Purchase Requisition (PR) is awaiting their approval.
- ***PR line item(s) rejected***: Informs *Requisitioner* that one or more line items on a requisition has been rejected (e.g., by Approver or Purchasing).
- ***PR workflow complete/PO created***: Informs *Requisitioner* that the requisition has been approved and a Purchase Order (PO) has been created. If over $10,000, the PO may require further review and approval by Purchasing before it is sent to the supplier.
- ***PO line item(s) rejected***: Informs *Requisitioner* that one or more line items have been rejected by Purchasing (e.g., though requisition was approved, Purchasing rejected a line due to an opportunity for negotiated pricing or alternate vendor).
- ***PO sent to supplier***: Informs *Requisitioner* that approved Purchase Order (PO) has been transmitted electronically to vendor.
- ***PO Line Item Backorder notice***: For a very few vendors, informs *Requisitioner* that an ordered item is temporarily unavailable.



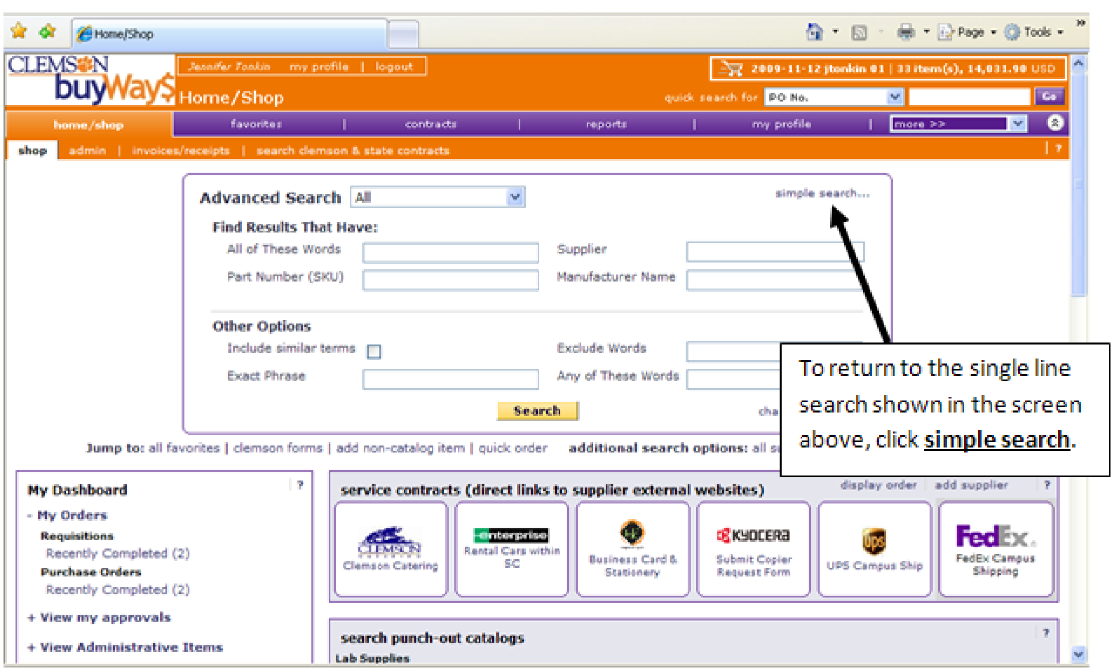
Under My Profile's Purchasing tab, the items you may change are:

- ***Bill To/Ship To Addresses***: One default Shipping Address is provided per your business manager's direction. It is recommended that you add others to accommodate delivery to your primary receiving location, and direct delivery. Also, packages over 400 pounds must be sent to Central Receiving.

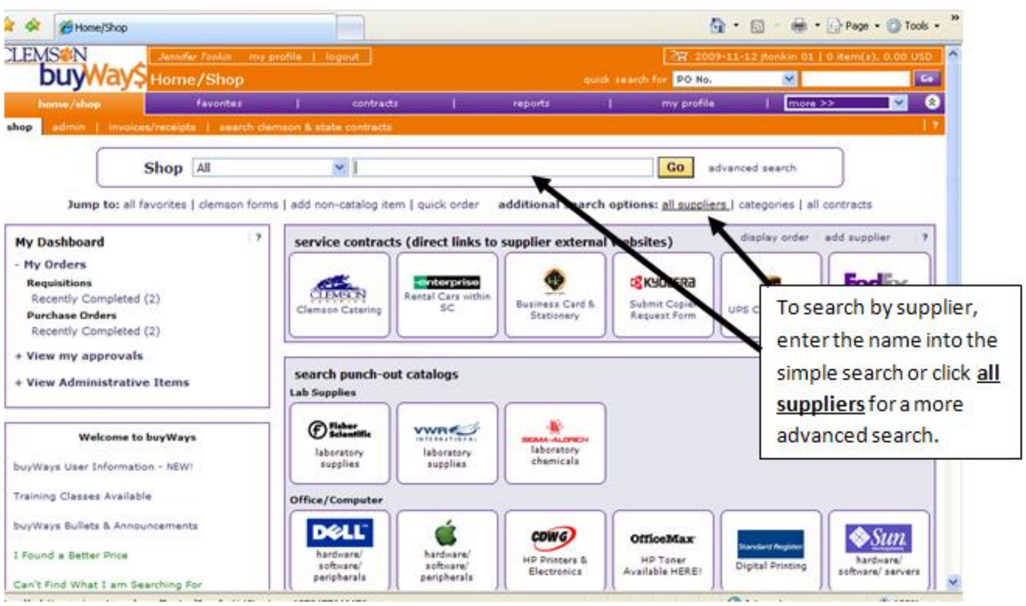
APPENDIX 3a Single Product Search Box Added to buyWays



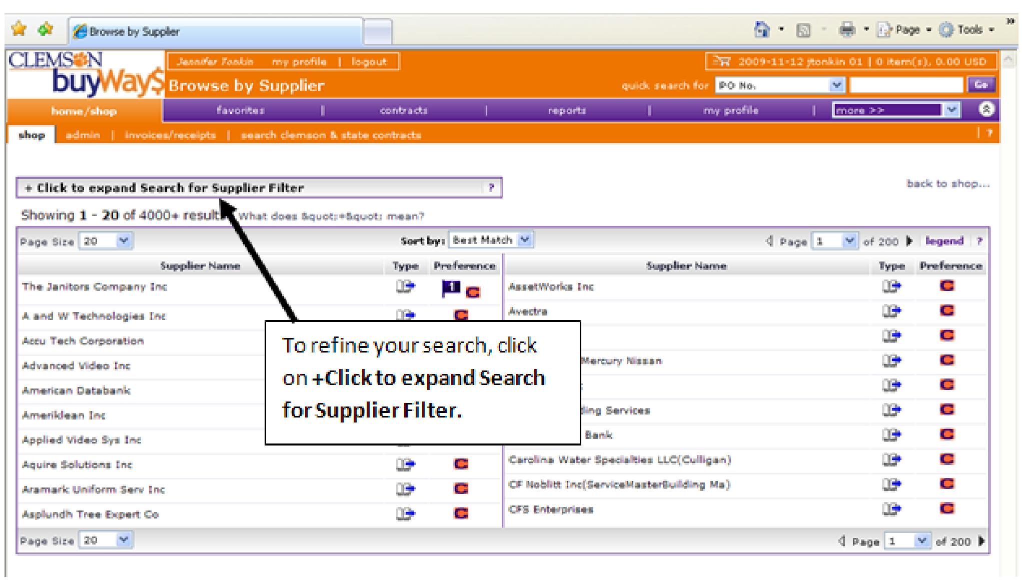
Clicking on the 'advanced search options…' brings you to this screen



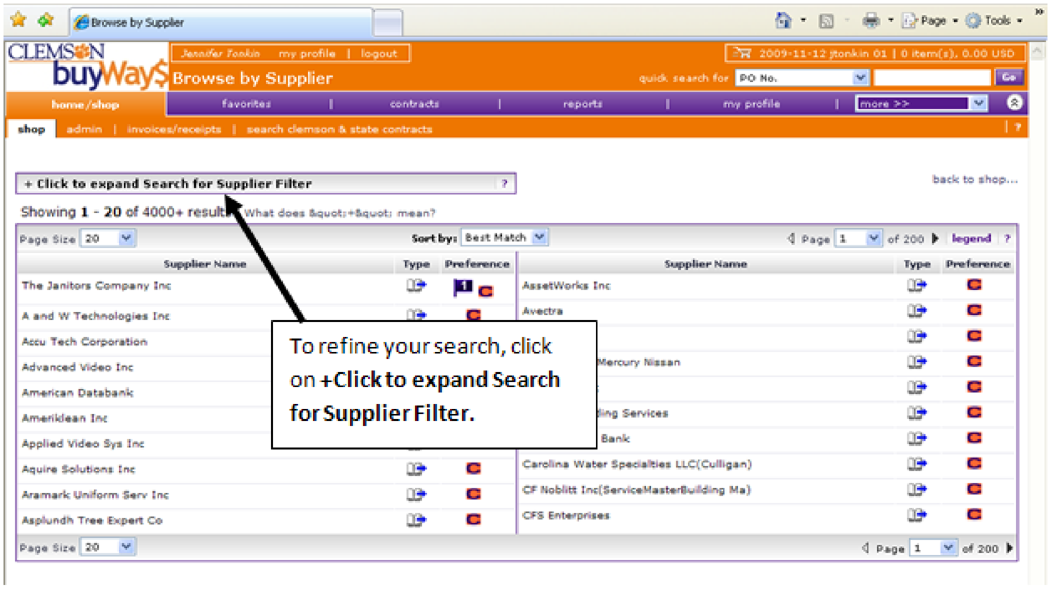
APPENDIX 3b Browse by Supplier Added to buyWays



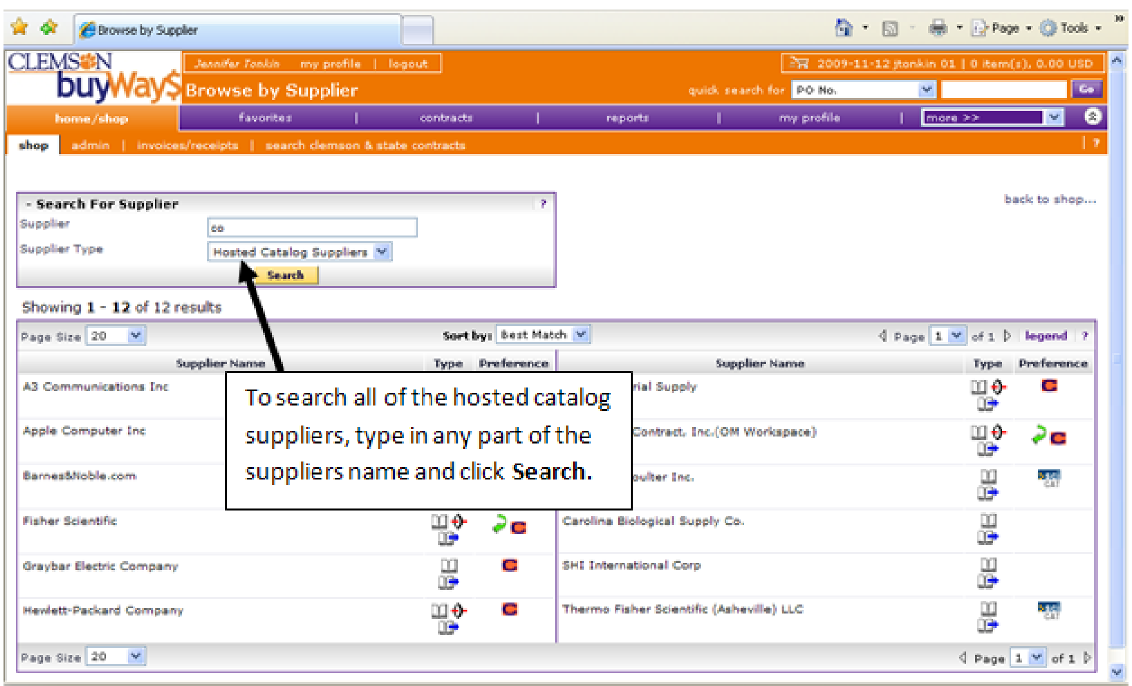
All suppliers with hosted catalogs appear as shown below



The “Search For Supplier” window below appears:

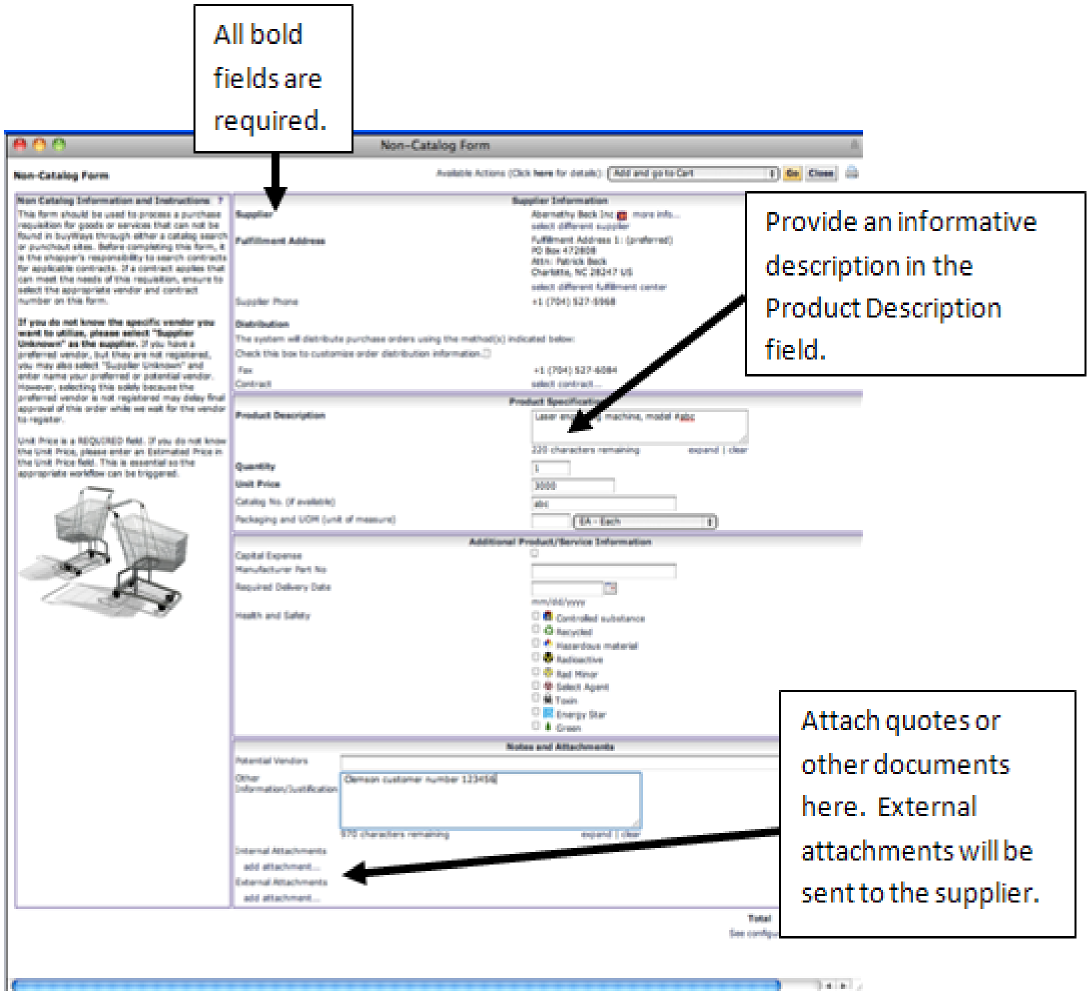


Limited list appears:



APPENDIX 4 Non-Catalog Requests <$2500

These requests go straight to the supplier after all departmental approvals are completed. They will not stop in Procurement Services for approval. As a best business practice, please use separate requisitions for your non-catalog requests. (Avoid mixing with catalog requests.) As demonstrated below, properly completing the form will help ensure that your order is processed quickly and accurately by the supplier:



APPENDIX 5 Requisition Waiting for Your Review (Approval)

Below is the email received when a requisition has been completed and is waiting for your review. Immediately upon submission of the requisition, this email is sent by the system to the appropriate approvers as designated by Department chair or PI. This email preference is one of the default email preferences for all approvers. It can be turned off by editing your Personal Profile Email Preferences.

```
Re: YOUR APPROVAL IS PENDING FOR REQUISITION#: 13511213 Approval Folder:
Department Approval

Dear Sherry Williams,

The requisition listed above has been submitted for your approval in buyWays
and is available in the approval folder referenced above. If the folder is a
shared folder, the requisition must first be assigned to your personal folder
before you can approve it. The requisition can be accessed for review online
by logging into buyWays and accessing "My Approvals" or by selecting the URL
below.

https://solutions.sciquest.com/apps/Router/ReqApprovalFolders?AuthUser=681252&
tmstmp=1258468122863



If you have any questions with regard to reviewing/approving this requisition,
please contact the individual who submitted the requisition or the buyWays
support team. An approval instruction guide is available on the buyWays
homepage in the Training & Reference Guides section.

Clemson buyWays Support Team:
+1 (864) 656-5581
cubuyways@clemson.edu

Thank You,
Clemson University
```

APPENDIX 6 buyWays Workflow 'Stop Points'

- ***Financial/High Dollar Approval***: If total order exceeds $100,000, the requisition will be completed; however, the PO will not be issued until the appropriate VP and the CFO approve the PO in buyWays. You can review the PO workflow for a specific order to see where a PO is pending approval.