Buyer / Browser Guide

This guide will review how to shop, create requisitions and track your requisitions, orders and invoices.

Contents

Buyer / Browser Guide ........................................................................................................................................... 1
Logging In .............................................................................................................................................................. 2
The Buyer / Browser Role in XavierBuy .................................................................................................................. 2
My Account Settings ............................................................................................................................................... 3
Key Concepts ....................................................................................................................................................... 4
Searching ............................................................................................................................................................... 4
  Product Searching ............................................................................................................................................... 4
  Supplier Searching .............................................................................................................................................. 5
Filling your Shopping Cart .................................................................................................................................... 5
  Shopping by Catalog ........................................................................................................................................... 5
  Shopping by Roundtrip (Punchout) .................................................................................................................... 6
  Shopping with Non-Catalog Items ..................................................................................................................... 7
Shopping Cart ..................................................................................................................................................... 9
  Reviewing the Shopping Cart ............................................................................................................................ 9
  Creating a Shopping List of Frequently Ordered Products ............................................................................... 10
Incomplete Requisitions from Browsers ............................................................................................................... 11
Creating a Requisition ....................................................................................................................................... 12
  Locations .......................................................................................................................................................... 12
Checkout Items .................................................................................................................................................... 13
  Notes and Attachments ..................................................................................................................................... 14
Organization Selection ....................................................................................................................................... 15
Saving a Checkout ............................................................................................................................................... 15
Logging In

1. Open your web browser. Chrome, Firefox, Safari, and Edge are recommended. Internet Explorer is also fine as long as it’s the most recent, updated version.
2. Log into Xavier’s Web Intranet and find the link to XavierBuy on the Employee Hub, under Systems. 
   https://www.xavier.edu/employees/systems
   OR
1. In the address field, type https://xavier.unimarket.com.
2. The Xavier University login page will appear.
3. Enter your single sign-on username and password and login.

If you experience any issues logging in, please contact procurement@xavier.edu.

The Buyer / Browser Role in XavierBuy

The Buyer / Browser role in XavierBuy is assigned to those users who have the authority to make purchases using the University’s funds. Buyers in the XavierBuy eProcurement system have the permissions for the following:

- Access suppliers in the online marketplace created specifically for Xavier
- Search and browse the contracted pricing catalogs from the Xavier suppliers
- Request and receive quotes from preferred suppliers
- Fill an individual shopping cart for checkout
- Accept and process requests from other users (Buyers or Browsers) in the Department
- Create requisitions for purchases
- View the status and approval path of requisitions
- View and export reports on purchase orders
- Indicate that the goods or services were received and are approved to pay
- View and track invoices against the purchase orders

The only difference between the Buyer and Browser roles is that Browsers are not able to submit requisitions for approval.
My Account Settings

When you initially log into XavierBuy it is recommended that you check your account details. You can find the My Account page under the silhouette at the top right of the screen. Within the My Account page you can update your preferred first and last name, phone number and email address as well as set your default FOAPAL**. Setting segments of your default FOAPAL will make the checkout process more efficient if you use the same FOAPAL segments repeatedly. It is NOT recommended that you set all parts of the FOAPAL as a default as you may forget to change the Account for different types of purchases. You can also access the online Help provided by Unimarket (the e-Procurement software provider behind XavierBuy) in the Help page under the My Account menu.

** FOAPAL is an acronym for FUND – ORGANIZATION – ACCOUNT – PROGRAM – ACCOUNT – LOCATION. These are the numbers that provide the accounting department the ability to trace all transactions of university funds. As of June 2020, Account (A) is not used by the University and Location (L) is only used by the Physical Plant Department.
Key Concepts

- There are two types of suppliers found in XavierBuy:
  - **Catalog (Premium) Supplier** – supplier who has a catalog in the XavierBuy marketplace or provides roundtrip/punchout access to their ecommerce site from XavierBuy.
  - **Non-Catalog Supplier** – supplier who does not have a hosted catalog on XavierBuy or provides roundtrip/punchout access to their site and instead requires products to be manually created in XavierBuy.

- Products to be ordered from a supplier can be accessed in one of two methods:
  - **Hosted Catalog** – supplier products are “hosted” on the XavierBuy website, meaning you do not leave the XavierBuy website to search and order these products. Hosted Catalogs are identified with the folder icon.
  - **Roundtrip/Punchout** – supplier products are found on the suppliers’ ecommerce website with a direct link to and from XavierBuy. Roundtrip/Punchout functionality will be identified with the circling arrow icon. A new window or tab will open in your internet browser and you will be signed into the Xavier account on the supplier’s ecommerce site.
  - **Non-Catalog Items** – products requiring information to be entered manually. Even Premium Suppliers could have products that can be entered manually if a product is not found in any of their catalogs.

Searching

Products or Suppliers can be located by searching the loaded catalogs of suppliers using the search options detailed below.

**Product Searching**

Product searches can be completed using the search function in the title section of XavierBuy. The loaded catalogs, index catalogs (products pointing to a punchout site) or supplier key words can be searched. This search field will also search for supplier names. To search in this method, complete the steps listed below:

1. From the title section, type the product name or key word search term in the search field.

   ![Search marketplace...](image)

2. Click Search.
3. Any products, supplier names or key words that match the criteria will appear in the search results.

**Searching Tips**

- Search terms can be combined using the words **AND** and **OR**.
  - **AND** will search for both words/phrases.
  - **OR** will search for one word/phrase or the other.
- Wildcard searches can be performed if the exact search word/phrase is unknown.
  - **?** will replace a single character; i.e. “Te?t” could be Test or Text.
Advanced product searching allows the search to be narrowed by Supplier Category, Supplier, or Product Category.

1. Click the magnify glass at the right side of the search bar in the search area.
2. From the Advanced Product Search window, type the name of the product you are searching for in the Search field.
   
   **NOTE: Any field marked with a red asterisk is a required field.**

Any time you see a blue question mark, a help bubble will appear when resting your cursor over it.

3. If desired, select a Tag or Supplier from the drop-down list and/or type in or select a Product Category to narrow your search results.
4. Click Search.
5. Any products that match the criteria will appear in the search results.
   
   **NOTE: Results will not return products from roundtrip suppliers unless they have additional search functionality enabled such as an “Index Catalog”.

### Supplier Searching

If you are searching for a specific supplier, there are multiple ways to locate the supplier and the product.

- From the Dashboard tab on the menu bar, click on the **Supplier icon** in the Recently Used Suppliers list of the Information Section.
- From the Dashboard, click **View all suppliers** at the bottom of the Recently Used Suppliers list of the Information Section.
- Click on the Marketplace drop-down on the menu bar, click **View Suppliers**.

Once you are on the Marketplace page you can search for the supplier by name.

### Filling your Shopping Cart

#### Shopping by Catalog

If a hosted catalog folder icon, appears ( ) after clicking on the supplier name or icon, you will be selecting products from the supplier’s hosted catalog on XavierBuy. The supplier may have multiple catalogs that appear.

1. Click on the **supplier catalog** that you wish to shop.
2. The products available within the catalog will appear.

3. Browse items individually or use the search bar to search within the selected catalog.
4. The sort by option defaults to relevant search term Name but can be changed to Code, Lowest Price, or Highest Price.
5. Clicking on the product title or product image will give you more information about the product.
6. When you have decided on a product to order, type the quantity in the Quantity field to the left of the Add to cart button.
7. Click the **Add to cart** button.
8. A confirmation message will appear, and the shopping cart will update to reflect the total number of products.

![Checkmark] Added item ‘Travel Mouse’ to your cart.

9. Repeat steps #3 – 9 for as many products as you need to order from this supplier.

**Shopping by Roundtrip (Punchout)**

If a circling arrow icon appears (🔗) after clicking on the supplier name or logo, you will be sent to the supplier’s website and logged into Xavier’s pricing catalog.

1. Click the **supplier** that you wish to shop from the marketplace.
2. Click the roundtrip icon or supplier name to go to the supplier’s website.

3. Each supplier’s website will be different. Browse and search for products as if you had come to the supplier’s website directly.

4. Add products that you wish to order on the supplier’s website by clicking the Add button.
   
   NOTE: The terminology of the button to click will vary based on the supplier’s website.

5. When finished shopping, click the Checkout or Submit Requisition button to return to XavierBuy.
   
   NOTE: The terminology of the button to click will vary based on the supplier’s website.

6. You will be returned to your shopping cart in XavierBuy with the products you had selected. The additional tab or browser window that opened for the supplier’s punchout site should close automatically. If this does not happen, consult your admin or IT support to look at your browser settings.

Shopping with Non-Catalog Items

If a supplier does not provide a catalog, you will need to create a Non-Catalog Item. You will need to enter the product’s information in the Non-Catalog form.

1. Click the supplier that you wish to shop.

2. Click the Create a Non-Catalog Item link to enter the products details.

3. From the Item Name field, type in the name of the product to be ordered.

4. Click the Next button.

5. Any products similar to what you entered that are in a contract pricing catalog will appear on the screen. If one of these products could be ordered instead, type in the quantity and click Add to Cart. If the products displayed are not what you need, click Next at the bottom of the screen to continue defining the product details.

6. Type in the product information.
   
   NOTE: Fields marked with a red asterisk are required fields

   a. *Name - will be filled in from your previous entry
   
   b. *Unit of Measure - type in the Unit of Measure or select from the drop-down list. Each (EA) is the most common unit of measure.
   
   c. *Unit Price – type in the single unit price of the product.
d. **Description** – description of product to ensure the supplier knows what you are ordering. The more detail, the better to ensure order accuracy.

e. **Product Code** - supplier’s product number or SKU.

f. **Category** – These are the UNSPSC international standard commodity codes. Type in the category code or select it by starting to type a commodity and selecting from the dynamic list that will appear.

g. **Manufacturers Part ID** – If the supplier is a reseller, you may enter the additional product ID number that refers to the manufacture’s product.

7. Next to the Add to cart button, type in the quantity to be ordered.

8. Click the **Add to cart button**.

9. You will be returned to the product screen to enter the next product line and a notification on screen will let you know that the product was added to your cart.

10. Repeat steps # 3 – 9 for each product line that you wish to order.
Shopping Cart
The shopping cart appears in header bar at the top of the page. The number of products will appear in the cart.

Reviewing the Shopping Cart
1. Click the shopping cart icon to view the products that have been added and be taken to your shopping cart.

2. All products in the cart will appear by supplier with an individual supplier total.
3. To adjust the quantity of any product, type the new quantity into the Quantity field of the product. The line item subtotal will update as you go.
4. To remove any product from the cart, click the red X icon next to the Quantity field.
5. To remove all products from the cart, click Clear Shopping Cart in the upper right-hand portion of the screen.
6. The Move button will allow you to move the product from your cart to a saved or incomplete requisition. From the requisition view, the Move button will allow you to move the item to a different requisition or back to your cart.
Creating a Shopping List of Frequently Ordered Products

If you have products that you regularly order, you can create a shopping list that can be reused every time you need to order those products. The products to be added to the shopping list need to be in the cart before proceeding. This is a great way to save time when you enter the product(s) manually on a frequent basis.

1. From the cart screen, click the **Create Shopping List**.

2. The Create Shopping List screen will appear.

3. The radio button for Create a new shopping list will be selected. Type a name for the shopping list in the field to the right.

4. If a shopping list has already been created and needs to be changed, select **Replace an existing shopping list** and select the shopping list from the available options.

5. Click OK.

6. Once a shopping list has been created, it can be accessed by clicking on **Marketplace** in the menu bar and selecting **Shopping Lists**. The following options are available:
   a. **Add selected to Cart** – select the products you want from the shopping list and click **Add selected to Cart** to add the products to your cart.

   
   **NOTE:** Doing so will replace anything that is currently in the cart.

   b. **Share Shopping List** – allows the user to share the shopping list they created with other organization units.

   c. **Delete Shopping List** – click **Delete Shopping List** to permanently delete the template. A confirmation message will appear prior to deletion to confirm your selection.

   **NOTE:** When you use a Shopping List, the products will replace any current products that you have in your shopping cart.
Incomplete Requisitions from Browsers
The Browsers in your department will be able to shop and reassign their incomplete requisitions to you as the Buyer. As the Buyer, you will be alerted by email from procurement@xavier.edu when an incomplete requisition has been assigned to you. See example email alert below.

Requisition R0000028 Assigned
Monica Human has assigned a requisition to you for action. They included the note:

Hi Mary - Will you please review this requisition and complete the FOAP information that should be used for this order. Thanks Monica

The requisition can be reviewed by clicking on Tasks -> Incomplete Requisitions.

To find and process this incomplete requisition, go to the Tasks menu and Incomplete Requisitions.

In the Incomplete Requisitions page, you will see all requisitions that have been assigned to you for completion. Click the requisition number to open and review the details or click Checkout to begin the checkout for completion of the requisition and routing for approval.
Creating a Requisition

1. Any products appearing in the shopping cart with a check in front of the product will be forwarded on to the checkout screen. If you do not wish to order a product yet but don’t want to delete it from the shopping cart, click the checkbox to remove the check.

<table>
<thead>
<tr>
<th>Product</th>
<th>Quantity</th>
<th>Price</th>
<th>Subtotal</th>
</tr>
</thead>
<tbody>
<tr>
<td>GRAINGER TK998999T Multi-Air Extension Tube</td>
<td>1</td>
<td>$52.92</td>
<td>$52.92</td>
</tr>
<tr>
<td>13 ft. Long For Use With Norton</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GRAINGER TK9989910T Replacement Grinding</td>
<td>1</td>
<td>$18.80</td>
<td>$18.80</td>
</tr>
<tr>
<td>Wheel For Use With Grainger</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GRAINGER APPROVED</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. Click Checkout to start the checkout and requisition process for the items being purchased for this supplier.

Locations
The shipping and billing addresses will be selected in the Locations section of the checkout screen. These addresses are preloaded in XavierBuy. If you select another location and complete the checkout, your selection will be your new default for your next checkout process. You can type the first letter of the location to navigate the dropdown list easily.
Attn Field

The Attention To field (Attn) is very important in your checkout process to ensure the accuracy of the delivery by the supplier. The most pertinent information for delivery should be first (left to right) in the "Attention To" field - i.e. lab or room # / Recipient last name / phone extension.

Example:

![Attn Field Example]

Checkout Items

The products or services that you selected from the shopping cart will be listed as separate lines in your checkout items. Each line item will show the product name, Unit Price/Unit of Measure, Quantity and Subtotal. You may remove the line items from the checkout screen using the buttons to the right of the products.

3. Use the Account fields to enter the value of the required FOAPAL fields.
   a. If you have set any segment of your FOAPAL string in your “My Profile Settings” page, these fields will auto populate in every checkout instance. It is not recommended that you default the Account field as that should change for each type of purchase that you are processing.
   b. You can begin typing the number or description of the FOAPAL element value and a dynamic list will appear to be chosen from.
   c. Use the magnifying glass to open a search window if you have trouble finding the FOAPAL element that you are trying to allocate for the line item.
   d. You can use the Copy Down button to repeat your selected accounts to each line below.
4. Delivery Date
   a. Delivery Date is an optional field on the line item that can be filled in as a suggested or preferred delivery date to the vendor. For critical deliveries, please follow up with the supplier directly to confirm the delivery date.

<table>
<thead>
<tr>
<th>Product</th>
<th>Delivery date</th>
</tr>
</thead>
<tbody>
<tr>
<td>GRAINGER TK39989910T Replacement Grinding Wheel ...</td>
<td>[Pick a date] 12:00 PM</td>
</tr>
<tr>
<td>COAS 1 - FUND - ORGN - ACCT - PROG - LOCN</td>
<td></td>
</tr>
</tbody>
</table>

Notes and Attachments
5. Enter any notes or attach any related documents to your order in the Justification or Notes and Attachments section of the checkout screen.
   a. The Justification Notes and Attachment are for internal justification use and will not be sent to the supplier. The Justification Notes will always be on the requisition and not carried over to the Purchase Order.
   b. The Delivery Notes and Order Attachments are for sending information to the supplier and will be sent to the supplier with the final PO.
   
   NOTE: If a different address is needed for delivery, alert the system administrators in Central Procurement so they can add the new location to the prepopulated list. Adding a different address in the delivery notes will not guarantee that the order is delivered to that address.
   c. You can attach as many documents as needed with a single file size limit of 50 megabytes
   d. You can also attach a file in the Order Attachments and chose not to send it to the supplier.
Organization Selection
Under the Justification Notes section of the checkout screen will be an Organization section. This section is for visibility and receiving capabilities across your organization to the supervisors and other users.

6. Select the Organization that is appropriate for your purchase. This will most likely match the FOAPAL selected for your line items. Selecting the correct Organization unit will allow others in your organization to view and perform any necessary receiving actions for this purchase order. You may only have one selection available to you, or you may have many depending on your organizations structure.

Saving a Checkout
7. If you need to enter more information and must come back to the checkout screen, you can Save your checkout progress.

This will create an Incomplete Requisition that can be seen in the Task Menu.
1. Once your checkout screen is complete with all the needed information, click Checkout.

Reassigning your cart
1. If you need to send this requisition to a Buyer for more information or to complete the requisition and process for approval routing, click Reassign.

2. A popup will prompt you to reassign your requisition to a Buyer. You can also include any important notes to the Buyer here.

A confirmation message will appear stating that the items have been forwarded to the designated individual. The Buyer will receive an email notification and the Incomplete Requisition will appear in the Tasks Menu for the Buyer to complete the requisition and route for approval. You can see the incomplete requisition status if you look at the View Requisitions page.

Budget Checking
Once you have selected “Checkout” the system will be doing a real-time budget check with Banner to confirm that the FOAPL(s) you entered on your Requisition/Expense. If there is enough budget for the FOAPL(s) you identified, then the Requisition/Expense will route directly to the Approval Workflow process. If there is not enough budget for your FOAPL(s) then the system will generate a “Soft Stop” yellow warning message letting you know that there is insufficient budget and for which line item.
If you receive this warning message you can still proceed with the Checkout process by simply selecting Checkout to submit your Requisition/Expense to the Approval Workflow process.

The system will also keep a record of the user who continued the checkout process by recording their user information as part of the “History” for the requisition.

**Tracking Requisitions**

After you successfully create a requisition you will be able to monitor the progress from your Dashboard on XavierBuy or from the Requisitions page under the Orders menu.

1. Click the Home button.

2. Requisitions that have been submitted can be viewed in the Requisitions in Progress area of the information section of the Dashboard.

3. Click on the requisition from the list.

4. You may also click View all requisitions to see all your requisition.
   a. The View Requisitions screen will appear.
   b. You can see the header level requisition information as well as the current approver(s).
   c. The top portion of the screen will allow you to search for a requisition. Select from one or more of the following search options and then click the Search button.
      i. Requisition Number
      ii. Supplier
      iii. Created Date
      iv. State
      v. Buyer
      vi. Organization Unit
   d. To select a requisition, click on the Requisition number from the list.
5. To view the approval status of the requisition, click on the Approvals tab. You will see the approvals that have happened, who the requisition is with now for approval and the next approval steps needed before the order is created.

<table>
<thead>
<tr>
<th>Items</th>
<th>Justification</th>
<th>Approvals</th>
<th>Comments</th>
<th>History</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>1. Current</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

On Behalf Of User Approval

- Approver: Monica Human
- Created Date: 4/2/2020 3:52 PM
- Completed Date: 1/1/2020 1:00 PM
- Level: Type
- Departmental Approval: President's Office [1/10000-10001-701002-6000-1]

6. The various approval statuses include:
   a. **Approved** - approved and advanced to the next level to an order
   b. **Declined** – was not approved and sent back to Buyer
      i. Declined requisitions can be copied and edited for resubmittal by the Buyer who originally created the requisition
   c. **Escalated** – skipped an individual to advance to next level
   d. **In Progress** - current level of approval

7. Once a requisition has been completely approved, a purchase order will be generated and sent to the supplier. An email with the purchase order number and details of the purchase order will be sent to the Buyer and the originator of the requisition confirming that the order was sent to the supplier.

**Reprocessing a Declined Requisition**

If your requisition is declined for any reason you will receive an email notification with the requisition number and details along with any notes that the declining approver provided. Reprocessing a declined requisition is easy. Follow the below steps to Copy and resubmit the requisition with changes.

1. Click the link to view the declined requisition from declined email notification or go to View Requisitions and search by Declined in the state search filter.
2. At the top right of the requisition view page, under the Actions menu, you will see the option to Copy the requisition.

3. When you copy the requisition, all information including the notes and attachments will be copied into a new Incomplete Requisition for you to edit and resubmit.
4. When you Copy, you will be taken directly to the Incomplete Requisition. Make any needed edits to the copied requisition and click Checkout to create the new requisition and route it for approval.
5. The new requisition will have a new number but will have a link and reference to the old requisition for historical information.

Viewing Order

1. Orders that have been created can be viewed in the Orders area of the information section of the Dashboard or from the Order menu and View Orders page.

<table>
<thead>
<tr>
<th>Orders</th>
<th>Supplier</th>
<th>Created Date</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grainger</td>
<td>XU000042</td>
<td>4/2/2020 3:51 PM</td>
<td>$71.72</td>
</tr>
<tr>
<td>Grainger</td>
<td>XU000041</td>
<td>4/2/2020 3:50 PM</td>
<td>$5,965.60</td>
</tr>
<tr>
<td>Grainger</td>
<td>XU000040</td>
<td>4/2/2020 3:48 PM</td>
<td>$2.50</td>
</tr>
<tr>
<td>Bio-Rad Laborat...</td>
<td>XU000039</td>
<td>4/2/2020 9:47 AM</td>
<td>$836.00</td>
</tr>
</tbody>
</table>

2. If the order is visible, click on the order from the list.
3. If the order is not visible, click View all orders to see all your orders.
   a. The View Orders screen will appear.
   b. The top portion of the screen will allow you to search for an order. Select from one or more of the following search options and the click the Search button.
      i. Order Number
      ii. Supplier
      iii. Created Date
      iv. Order Type
      v. Buyer
      vi. Receiving Status
      vii. If the Order has been invoiced or not
      viii. Organization Unit
   c. To select an order, click on the Order number from the list.
Exporting Order Reports

1. From the View Orders page, you can use the down arrow on the search button to Export the current search results into an excel spread sheet with the header level report or an export of the line item detail.
Canceling an Order
An order can only be canceled if the order has not been invoiced or marked as having any receiving history. Some suppliers with Order Integration can disable the ability to have a canceled order since they are processing the orders as quickly as possible. If an order needs to be canceled, contact the supplier to cancel the order or return the order once received. This would be the supplier’s preferred process if they have disabled the ability to cancel an order in XavierBuy.

To cancel an order that has not been received against or invoiced:

1. Locate and view the order from the View Orders screen
2. Select Cancel from the Action options in the top right
3. Confirm that you want to cancel the order

The supplier will be notified via email that the order has been cancelled and you as the Buyer will be CC’d for any added discussion through a reply all email. The order will also be canceled in Banner and the encumbered funds released.

Changing an Order
An order can only be changed if the order has not been invoiced or marked as having any receiving history. Some suppliers with Order Integration can disable the ability to have change orders done since they are processing the orders as quickly as they can. If an order needs to be changed, contact the supplier to cancel the order and/or create a new order and return the initial order once received. This would be the supplier’s preferred process if they have disabled the ability to change an order in XavierBuy.

To change an existing order that has not been received against or invoiced:

1. Locate and view the order from the View Orders page and select Edit in the Action items at the top right of the page.
2. A new incomplete requisition will be created with the original order details and will be placed into the checkout.

3. The original order details will be copied and can be modified as required from within the checkout screen. This includes Quantity, FOAPAL, Billing and Shipping addresses as well as other related information like notes and attachments.

4. Once you have the desired changes made, click Checkout.

The modified order will be routed for approval again IF the FOAPAL codes changed or the total value of the order is higher than the original. If the modifications to the order do not change the FOAPAL or increase the value, the changed order will be created with a new order number referencing the original order as a Change Of Order.

Once approved, a new order will be generated and sent to the supplier with a reference to the changed order. The Change Of Order link will provide an audit trail for the previous order. The original order will be canceled with a notification to the supplier and cancelation in Banner to release the funds.