Buyer's Guide

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

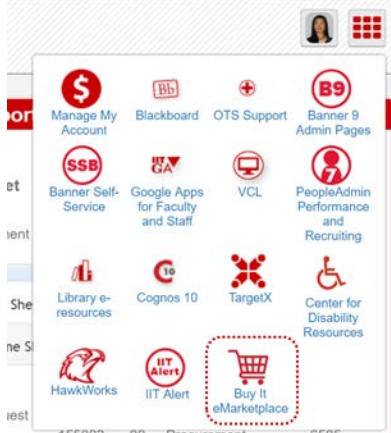## Contents

Logging In

1. Open your web browser.
2. Log into **MyIIT Portal** and find the link to **Buy It** on the Tools tab

   OR
3. In the address field, type https://iit.unimarket.com.
4. The Illinois Tech **Buy It** login page will appear.
5. Enter your Illinois Tech username and password and login.
6. Your **Buy It** home page will appear.

If you experience any issues logging in, please contact purchasing@iit.edu.

The Buyer Role in **Buy It**

The Buyer role in **Buy It** is assigned to those users who have the authority to make purchases using the Universities funds based on the FOAP. Buyers in the **Buy It** eProcurement system have the permissions for the following:

- Access suppliers in the online marketplace created specifically for Illinois Tech
- Search and browse the contracted pricing catalogs from the Illinois Tech suppliers
- Request and receive quotes from preferred suppliers
- Fill an individual shopping cart for checkout
- Accept and process requests from other users (Browsers) in the department that do not have FOAP authority
- Create requisitions for purchases against the Illinois Tech FOAP
- 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

My Account Settings

When you initially log into **Buy It,** 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 accounts. Setting your default account codes will make the checkout process more efficient if you use the same accounts repeatedly. It is NOT recommended that you set all parts of the account 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 in the Help page under the My Account menu.
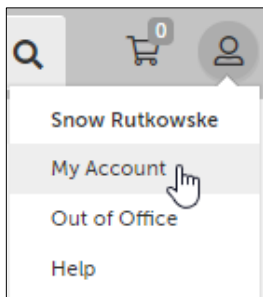
Key Concepts

- There is currently one type of supplier found in **Buy It**:
  - **Premium Supplier** – supplier who has a catalog in the **Buy It** marketplace or provides roundtrip/punchout access to their ecommerce site from **Buy It**
- Products to be ordered from a supplier can be accessed in one of two methods:

  - 📁 **Hosted Catalog** – supplier products are "hosted" on the **Buy It** website, meaning you do not leave the **Buy It** 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 **Buy It**. Roundtrip/Punchout functionality will be identified with the globe icon. A new window or tab will open in your internet browser and you will be signed into the Illinois Tech account on the supplier's ecommerce site.

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 **Buy It**. 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.

All ▾ glove	x	🔍

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.
  - ***** will replace multiple characters; i.e. "Test*" could be Tester or Testing.

Advanced product searching allows the search to be narrowed by Product Tag, Supplier Tag, Supplier Category, Supplier, or Product Category.

1. After you have entered your search in the search bar and hit "enter" or clicked on the magnifying glass; your search results will populate and you will have the ability to filter those results based on the advanced search filters.
2. If desired, select a **Product Tag, Supplier Tag, Category** or **Supplier** from the drop down list.
3. Click **Search**.
4. 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 **Buy It**.   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.
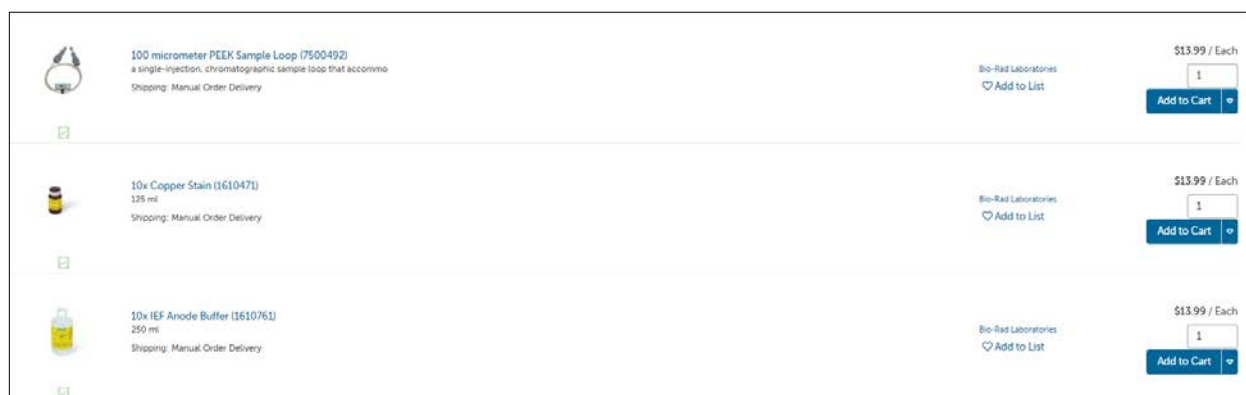
3. Browse items individually or use the search bar to search within the selected catalog.
4. The sort by option defaults to relevant search term Name but can be changed to Code, Lowest Price, or Highest Price.
5. Clicking on the product title or product image will give you more information about the 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.
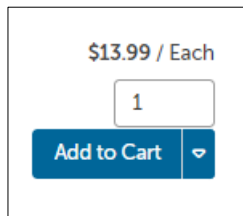
7. Click the **Add to cart** button.
8. A confirmation message will appear and the shopping cart will update to reflect the total number of products.

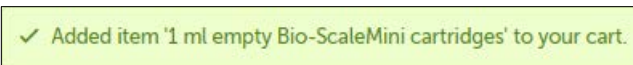9. Repeat steps #3 – 9 for as many products as you need to order from this supplier.

Shopping by Roundtrip (Punchout)

If a globe icon appears ( ) after clicking on the supplier name or icon, you will be sent to the supplier's website and logged into the Illinois Tech 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 **Buy It**.
   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 **Buy It** 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 browsers settings.
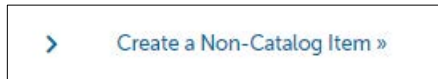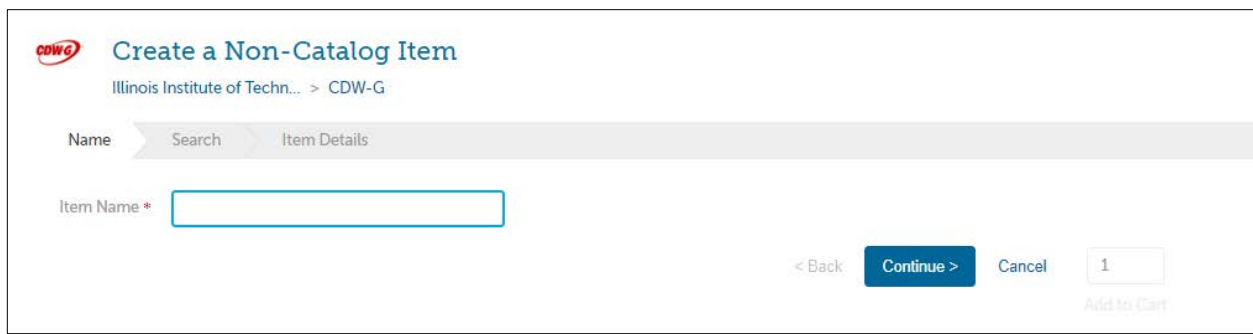
Shopping with Non-Catalog Items

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.

> Create a Non-Catalog Item »

3. From the Item Name field, type in the name of the product to be ordered.
4. Click the **Next button**.

CDW-G **Create a Non-Catalog Item**
Illinois Institute of Techn... > CDW-G

Name | Search | Item Details

Item Name *

< Back | Continue > | Cancel | 1
Add to Cart

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 Price** – type in the single unit price of the product.
   c. ***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.
   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 manufactures 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.

✓ Added item 'Toner' 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.
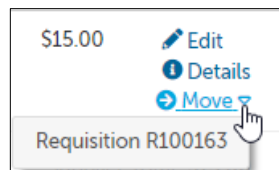

2. All products in the cart will appear by supplier with an individual supplier total.

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. You are able to edit any of the Non-Catalog or Manual products that you have entered if you notice any incorrect information. Use the **Edit** button to the right of the Subtotal.
7. 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**.
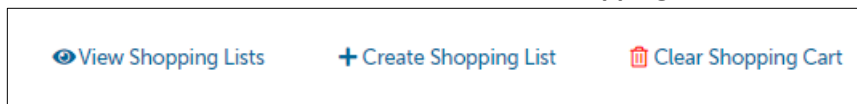
2. The Create Shopping List screen will appear.
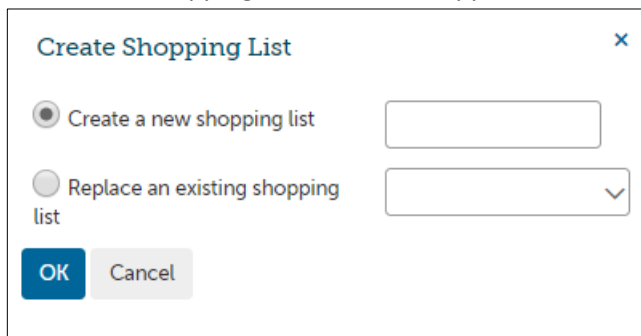
3. The radio button for Create a new shopping list will be selected. Type a name for the shopping list in the field to the right.
4. If a shopping list has already been created and needs to be changed, select **Replace an existing shopping list** and select the shopping list from the available options.
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 add to any current products that you have in your shopping cart.

Incomplete Requisitions from Browsers

The users in your department that do not have FOAP authority 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 purchasing@iit.edu when an incomplete requisition has been assigned to you. See example email alert below.
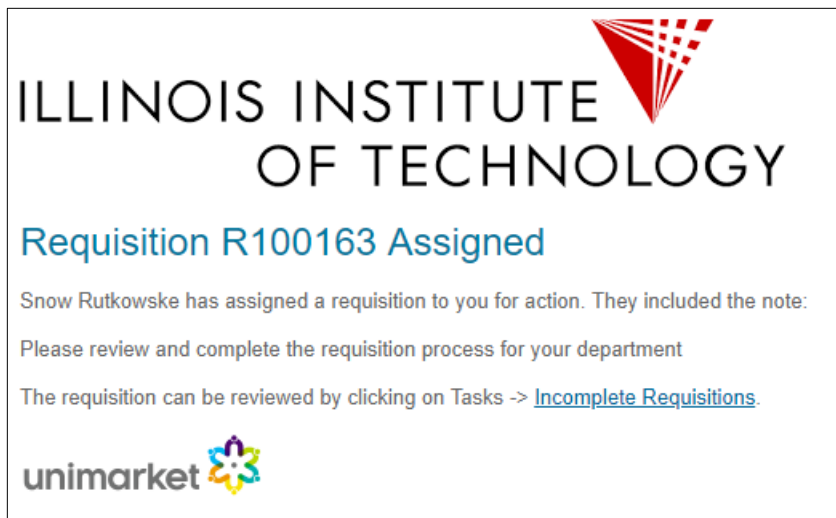
To find and process this incomplete requisition, go to the Tasks menu and Incomplete Requisitions.
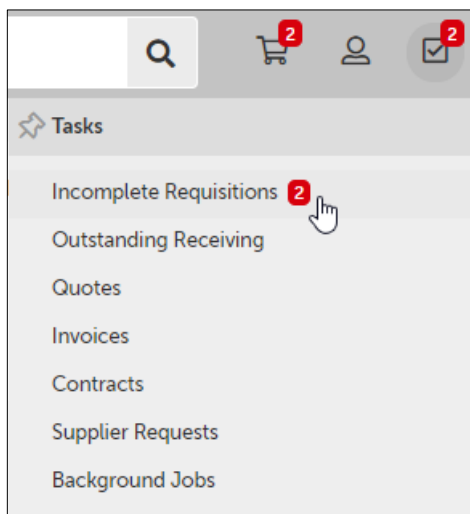
In the Incomplete Requisitions page, you will see all requisitions that have been assigned to you for completion. Click the requisition number to open and review the details or click Checkout to begin the checkout for completion of the requisition and routing for approval.

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.

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 **Buy It**. 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:

Organization Selection

Below the Bill To and Ship To 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. Illinois Tech identifies your Organization Unit based on your Home Organization in the HR database.

> Organization 6205 Procurement Services
>
> ┌─ Organisation Unit ─────────────────────────────┐
> │ 6205 Procurement Services   ∨ │
> └──┘
> This is the organization unit you are making the purchase for. It is used to group transactions by organization unit.

3. Select the Organization that is appropriate for your purchase. This will most likely match the FOAP 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 or you may have many depending on your organizations structure.

Checkout Items

The items 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.

4. Use the Account fields to enter the value of the required FOAP fields.
   a. If you have set your default accounts 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 FOAP 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 FOAP 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.

   [≡]

5. 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.

Notes and Attachments

6. 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 Purchasing 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.

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.
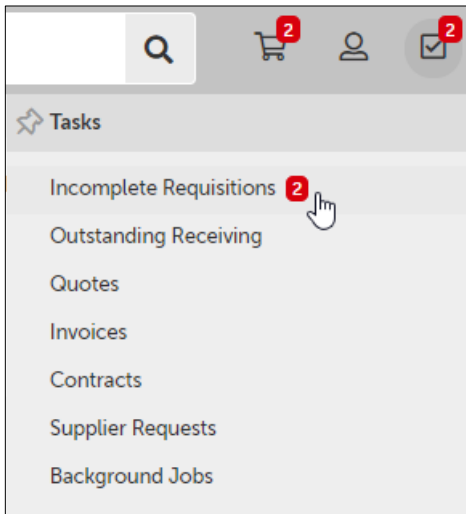
1. Once your checkout screen is complete with all of the needed information, click Checkout.
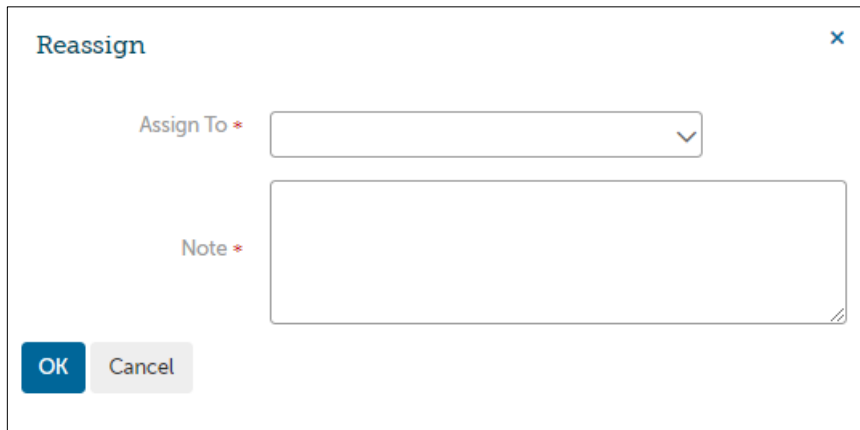
Reassigning your cart

1. If you need to send this requisition to another buyer for more information or to complete the requisition and process for approval routing, click **Reassign.**

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.

FOMPROF Security Check

If you do not have access to purchase using the FOAP you will receive the below error and will not be able to continue.

If you do not have Banner access to purchase with the selected FOAP, you will see the below error. You will not be able to continue and must contact your administrator.

Note: you will not lose the products that you have added to your cart, they will be available in your shopping cart. It is recommended to Save your checkout to preserve the information entered on the checkout screen.

Tracking Requisitions

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

1. Click the Home button or the **Buy It** logo.

    or

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

Requisitions in Progress			
Grainger	R100160	3/14/2019 11:58 AM	$50.00
Grainger	R100148	3/14/2019 11:20 AM	$599.00
Grainger	R100146	3/14/2019 11:20 AM	$599.99
Grainger	R100147	3/14/2019 11:20 AM	$599.99
			View requisitions

3. Click on the **requisition** from the list.
4. You may also click **View all requisitions** to see all of 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.

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 the next level
    d. **Skipped** – skipped an individual to advance to the next level
    e. **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.

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 of 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**
      ix. **Order Status**
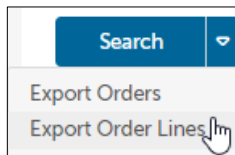   c. To select an order, click on the **Order number** from the list.

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.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	OrderNumber	OrderType	PaymentMethod	RetrofitOrder	CreatedDate	OrderDate	OrderState	ReceivingState	HasAcceptedInvoice	RequisitionNumber	BlanketOrder	Organisation	OrgUnit	Buyer
2	PE100136	Standard	On Account	FALSE	3/14/2019 14:50	3/14/2019 14:50	Open	Open	FALSE	R100162		IIT	6205 Procurement Services	Snow Rutkowske
3	PE100135	Standard	On Account	FALSE	3/14/2019 14:44	3/14/2019 14:44	Open	Open	FALSE	R100161		IIT	6205 Procurement Services	Snow Rutkowske
4	PE100134	Standard	On Account	TRUE	3/14/2019 11:58	3/14/2019 11:53	Open	Closed	TRUE	R100157		IIT	6205 Procurement Services	Adrienne Wassell
5	PE100133	Standard	On Account	TRUE	3/14/2019 11:58	3/14/2019 11:54	Open	Closed	FALSE	R100158		IIT	6205 Procurement Services	Michael Wheaton
6	PE100132	Standard	On Account	TRUE	3/14/2019 11:58	3/12/2019 11:56	Open	Closed	FALSE	R100159		IIT	6205 Procurement Services	Snow Rutkowske
7	PE100131	Standard	On Account	FALSE	3/14/2019 11:52	3/14/2019 11:52	Open	Open	FALSE	R100156		IIT	6205 Procurement Services	Michael Wheaton
8	PE100130	Standard	On Account	FALSE	3/14/2019 11:52	3/14/2019 11:52	Open	Open	FALSE	R100155		IIT	6205 Procurement Services	Adrienne Wassell
9	PE100129	Standard	On Account	FALSE	3/14/2019 11:38	3/14/2019 11:38	Open	Closed	TRUE	R100154		IIT	6530 Controllers Office	Luzmarie Arellano
10	PE100128	Standard	On Account	FALSE	3/14/2019 11:36	3/14/2019 11:36	Open	Closed	TRUE	R100153		IIT	6205 Procurement Services	Michael Wheaton
11	PE100127	Standard	On Account	FALSE	3/14/2019 11:32	3/14/2019 11:32	Closed	Closed	FALSE	R100151		IIT	6530 Controllers Office	Luzmarie Arellano
12	PE100126	Standard	On Account	FALSE	3/14/2019 11:31	3/14/2019 11:31	Open	Closed	TRUE	R100152		IIT	6530 Controllers Office	Elena Mancari
13	PE100125	Standard	On Account	FALSE	3/14/2019 11:31	3/14/2019 11:31	Open	Closed	TRUE	R100150		IIT	6205 Procurement Services	Snow Rutkowske

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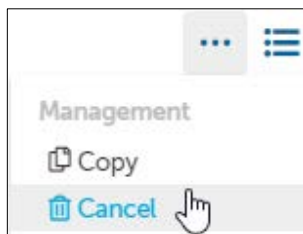
To cancel an order that has not been received against or invoiced:

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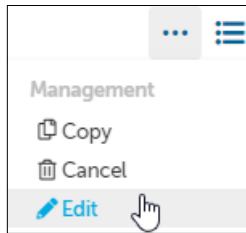
To change an existing order that has not been received against or invoiced:

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, FOAP, billing and shipping addresses as well as other related information like notes and attachments.
4. Non-Catalog items can also be changed by selecting the "Edit product" option on the line item that you wish to edit the details on.

Unit price	Qty.	Subtotal	Tax	
$15.00 / Each	1	$15.00	$0.00	🗑 Remove ✏ Edit product

5. You can add items from your shopping cart to this change (incomplete Requisition) by using the Move feature as well.
6. Once you have the desired changes made, click Checkout.

The modified order will be routed for approval again IF the FOAP codes changed or the total value of the order is higher than the original. If the modifications to the order do not change the FOAP 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.