

WRIGHTBUY E-PROCUREMENT PROGRAM

REQUESTOR TRAINING MANUAL



WrightBuy is the e-procurement site that took the place of the Self Service Requisitions utilized in Banner. The new system is much more efficient in that many items may be ordered from electronic catalogs that have our contract pricing shown for all items.

When items are ordered from the catalogs, the descriptions will no longer have to be manually keyed on a requisition, as they will automatically populate to the order that will be electronically sent to the vendor when under the bid limit. Also, users are no longer limited to 5 line items as in the Banner requisition system.

By using the catalogs, users will be assured of receiving the best possible pricing based on negotiated contracts that were based on annual spend. Thus whether you are buying one or one hundred of an item, you will receive the most favorable pricing. As a result of using the WrightBuy portal, it will not only provide us the best pricing, but be capable of providing much better contract usage reporting than in the past.

Requirement for items or services that do not have catalogs from which to buy, have an electronic requisition or "Form" to allow the creation of a non-catalog requisition from which a purchase order can be created by the Purchasing department. All the orders will continue to have electronic approval with the added benefit of having the ability to scan back-up information to be sent with the requisition prior to its review.

WrightBuy Requestor Training

WrightBuy is Wright State's new procurement system that will be used to initiate purchase requisitions by one of the following methods:

Punchout catalogs

You may order using Punchout catalogs from Office Depot, Apple, Pomeroy, Fisher Scientific, Sigma-Aldrich, Invitrogen, Grainger, and VWR Scientific. Items ordered through the Punchout catalogs have contracted prices negotiated by the WSU Purchasing Department to offer the best pricing.

Non-Catalog vendors

You can create requisitions for other vendor orders greater than \$1,000 which requires various levels of departmental and special approvals.

Procard orders

The system can accommodate using a University Procard for Punchout vendors up to the card transaction limit for orders which do not require departmental or university approvals. ***You are responsible for ensuring you do not enter orders over the credit card limit.*** The system will not prevent you from entering an order over the procard limit, but the vendor will have the transaction rejected when sending through the credit card payment.

Other forms

Standing/Blanket Order

Used for creation of standing orders and blanket orders. The requisition will pass to Banner as a requisition, not a purchase order. Purchasing creates the purchase order using the existing number sequence for blanket and standing orders. Use only when multiple payments are to be made throughout the term of the purchase order.

Change Order Request

Used when a change is needed to an existing purchase order. User will submit the Change order via WrightBuy which will pass to the Banner system as a requisition. Purchasing will make the change to the purchase order in Banner and submit it to the vendor. Purchasing will also make the change to the original purchase order in WrightBuy to match Banner.

Check request

"Check only" form is used to request payment for an invoice over \$1,000 which does not require a purchase order. (Wright Way policy #5401.10)

The screenshot displays the WrightBuy Requestor Training interface. At the top, there are navigation tabs: Favorites, Quick Order, Product Search, and Forms. The Forms tab is highlighted with a red circle and a callout box that reads "Other Forms: Change order, Check request, Standing order". Below the navigation tabs, there is a section for "All Category Search" with a search bar and a "Search" button. To the left of the search bar, there are links for "Browse by Supplier", "Browse by Category", and "Browse Contracts". Below the search bar, there is a section for "Forms" with a link for "Non-Catalog Form". A red callout box points to this link with the text "Non-catalog Vendor Order Forms". To the right of the search bar, there is a section for "Punchout" with a link for "Lab Supplies". A red callout box points to this link with the text "Punchout catalogs". Below the "Punchout" section, there are logos for Fisher Scientific, Office/Computer, Apple, Office DEPOT, and GRAINGER.

WrightBuy Login

There is a link in WINGS Express under the Finance tab:
“Create and Approve WrightBuy Requisitions”

Figure 1 shows the WrightBuy Login screen that you will see when you enter the system.
Simply enter your Novell User Name and Password.

WSU Services
WrightBuy Logon

User Name:
Password:

Note,

- o Your Campus User Name is ... For example: w001wh
- o If you have questions, contact the CaTS Help Desk at (937)775-4827 or stop by 025 Library Annex.

For technical support, contact the [Help Desk](#). [Copyright Information](#) © 2000

Figure 1

Once you login, this is the home page requestors will see.

Online help is available throughout the system where ever you see a ? Click on the ? to see the help text.



HOME PAGE

On the Home page there is a **Message Box** which will keep you updated on any changes to the system.

You can access any requisition you have created or need to approve in the **Review Box**.

There are links to useful **Resources**.

The screenshot shows the WrightBuy Home - Product Search page. At the top, there is a navigation bar with links: home, my favorites, product search, carts, approvals, history, settlement, and more. Below the navigation bar, the page is divided into several sections. On the left, there is a 'Welcome Chris Watson' message. Below this is a 'WRIGHTBUY Message' box. To the right of the message box is a 'Review' box. Below the review box is a 'My Resources' section. On the right side of the page, there is a 'Favorites' tab, a 'Quick Order' tab, a 'Product Search' tab, and a 'Forms' tab. The 'Product Search' tab is active, showing a search bar and a list of search results. A red callout box points to the 'Review' box, stating: 'The Review box has links to requisitions you have created.' A blue callout box points to the 'My Resources' section, stating: 'You can access any requisition you need to approve at any level.'

The Home Page desktop has a tab for **Favorites** where you can save frequently ordered items, the **Product Search** tab for the links to the Vendor Punchouts and the Non-Catalog ordering form, and the **Forms** tab to access the Standing/Blanket Order, Check Request, and Change Order Request forms.

The screenshot shows the WrightBuy Home - Product Search page. At the top, there is a navigation bar with links: home, my favorites, product search, carts, approvals, history, settlement, and more. Below the navigation bar, the page is divided into several sections. On the left, there is a 'Welcome Chris Watson' message. Below this is a 'WRIGHTBUY Message' box. To the right of the message box is a 'Review' box. Below the review box is a 'My Resources' section. On the right side of the page, there is a 'Favorites' tab, a 'Quick Order' tab, a 'Product Search' tab, and a 'Forms' tab. The 'Product Search' tab is active, showing a search bar and a list of search results. A red callout box points to the 'Favorites' tab, stating: 'You can save frequently ordered items under Favorites.' A blue callout box points to the 'Product Search' tab, stating: 'Product Search has links to the punchout vendors.' A green callout box points to the 'Forms' tab, stating: 'Forms has links to the 3 other order forms.'

PUNCHOUT ORDER

To order from one of the Punchout Vendors click on the Vendor link.

WRIGHTBUY e-procurement

Chris Watson profile | logout

Home - Product Search

Search for PR No. [] Go

home | my favorites | product search | carts | approvals | history | settlement | more >>

desktop

Welcome Chris Watson

WRIGHTBUY Message

Welcome to the Wright State University
WrightBuy e-procurement System
User Acceptance Testing
Email purchasing@wright.edu

Quick Links: s

Review

- My Requisitions
 - Total Requisitions: 16
- History
- Draft Carts
 - My Draft Carts: 1
- My PR Approvals
 - Active: 0
 - Pending: 0
- Level 2: ULIB (Library Administration):
(3,000.00 - 99,999,999.00) USD
 - Not Assigned: 1
 - Pending: 1
- Level 3: ULIB (University Libraries): (All Values)
 - Not Assigned: 1
 - Pending: 2

Product Search

Enter search terms, e.g., supplier name, catalog no., product name, CAS#, etc.

☐ Include similar terms

Search

Punchout

Lab Supplies

Office/Computer

MRO/Facilities

GRAINGER

Office DEPOT

Punchout Vendor Links

This will take you to the vendor site where you will select all the items to be ordered. When you have finished, you will be returned to the WrightBuy site to complete the order. All the items ordered will be placed in the active cart. See the example of an Office Depot order below. You can change the cart name and description to make it easier to identify then click on **Save**.

WRIGHTBUY e-procurement

Chris Watson profile | logout

2007-04-17 w002caw 01 | 5 Item(s), 333.19 USD

Cart - Draft Requisition

Search for PR No. [] Go

home | my favorites | product search | carts | approvals | history | settlement | more >>

active cart | draft carts | my favorites | my requisitions

Create Cart

Add Products → Edit Cart → Review → PR Approvals → PO Preview → Place Order

Required field: Account

Save

Cart Name: 2007-04-17 w002caw 01

Description: []

Priority: Normal

Supplier / Line Item Details

Show line details

For selected line items: Add To Favorites

Office Depot more info...

Business 1

Po Box 633211, Cincinnati, OH 45263-3211 US

Contract: 54321 more info...

Quote number: []

PO Number: To Be Assigned

The items were retrieved from an external supplier site, therefore your ability to edit or view the items in this application may be limited. Click this message for more details.

The following lines cannot be accessed on the supplier's website. Click this message for more details. Line(s): 1, 2, 3

	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1	JWOD Desktop Calculator, 12ndashDigit	660171	EA	41.25	1 EA	41.25	
				Contract: 54321 more info...			
				Select price or contract...			
2	MicroMICR Model TJN-38A (HP Q1338A) Black Toner Cartridge	437256	EA	141.75	2 EA	283.50	
				Contract: 54321 more info...			
				Select price or contract...			
3	BIC(R) Atlantis(TM) Retractable Ballpoint Pens, Medium Point, 10 mm, Clear Barrel, Blue Ink, Pack Of 12 323004		DZ	4.22	2 DZ	8.44	
				Contract: 54321 more info...			
				Select price or contract...			
				Supplier subtotal		333.19 USD	

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal 333.19
Total 333.19 USD

Save

To continue, click on **Review**.

WrightBuy e-procurement | Chris Watson | profile | logout | 2007-04-17 w002caw 01 | 5 item(s), 333.19 USD

Cart - Draft Requisition

home | my favorites | product search | carts | approvals | history | settlement | more >>

active cart | draft carts | my favorites | my requisitions

Create Cart | Add Products | Edit Cart | **Review** | Place Order

PR Approvals | PO Preview

Required field: Account

Save

To complete the order you need to click on Review

You will need to click on **Edit** for each section that needs to be completed or changed including the credit card information and the FOAPAL information (if there are no default values).

If a Procard is used, the FOAPAL will be determined by the card and vendor codes.

You can use the **Look up – Accounting Codes** to search on WSU Index. Click on **Edit** and enter the WSU Index. Then click on **recalculate/validate values** which will return the appropriate fund, organization, and program. **You will need to enter these values in the Accounting Codes fields.** Newly created funds or orgs will be available the next day.

WrightBuy e-procurement | Chris Watson | profile | logout | Admin supplies | 5 item(s), 333.19 USD

Summary - Draft Requisition

home | my favorites | product search | carts | approvals | history | settlement | more >>

active cart | draft carts | my favorites | my requisitions

Create Cart | Add Products | Edit Cart | Review | Place Order

PR Approvals | PO Preview

Required field: Account

Requisition | PR Approvals | PO Preview

Summary | Shipping | Billing | Accounting Codes | Supplier Info

Hide header

Cart Name: Admin supplies | Description: Jones order | Priority: Normal | Prepared by: Chris Watson

Ship To: Attn: Lisa Bleake, Building: Dunbar Library, Floor: 120, WSU Dept Direct, 3640 Colonel Glenn Hwy, Dayton, OH 45435, United States

Delivery Options: Expedite, Ship Via, Reg Delivery

Best Carrier-Best Way

View/edit by line item...

Billing To: Wright State University, Attn: Accounts Payable, 3640 Colonel Glenn Highway, 303 University Hall, Dayton, OH 45435-0001, United States

Credit Card Info: No credit card has been assigned.

Billing Options: Accounting Date

View/edit by line item...

Look up - Accounting Codes

WSU_Index | WSU_Fund | WSU_Organization | WSU_Account | WSU_Program | WSU_Activity | WSU_Location

Accounting Codes

Chart	Fund	Organization	Account	Program	Activity	Location
W	190000	290000		40010	no value	no value
W	Unallocated Current General Funds	University Libraries-Administration		Libraries		

Required field

Internal Notes and Attachments

External Notes and Attachments

Supplier / Line Item Details

Office Depot | Business 1 | Po Box 633211, Cincinnati, OH 45263-3211 US

Contract: 54321 | Quote number: To Be Assigned

The items were retrieved from an external supplier site, therefore your ability to edit or view the items in this application may be limited. Click this message for more details. The following lines cannot be accessed on the supplier's website. Click this message for more details. Line(s): 1, 2, 3

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 JWDD Desktop Calculator, 12ndashDigit	660171	EA	41.25	1 EA	41.25
2 MicroMICR Model T3N-38A (HP Q1338A) Black Toner Cartridge	437256	EA	141.75	2 EA	283.50
3 BIC(R) Atlantis(TM) Retractable Ballpoint Pens, Medium Point, 10 mm, Clear Barrel, Blue Ink, Pack of 12	323004	DZ	4.22	2 DZ	8.44

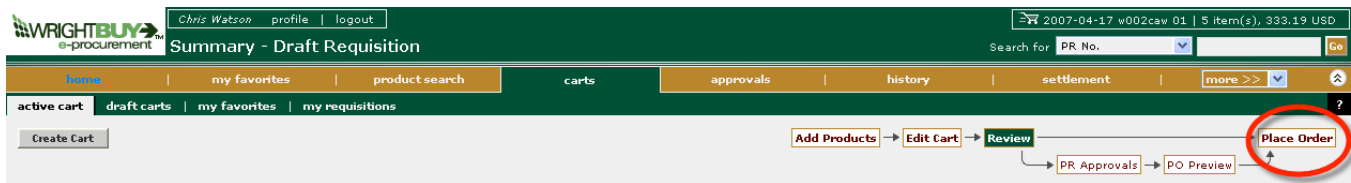
Supplier subtotal: 333.19 USD

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

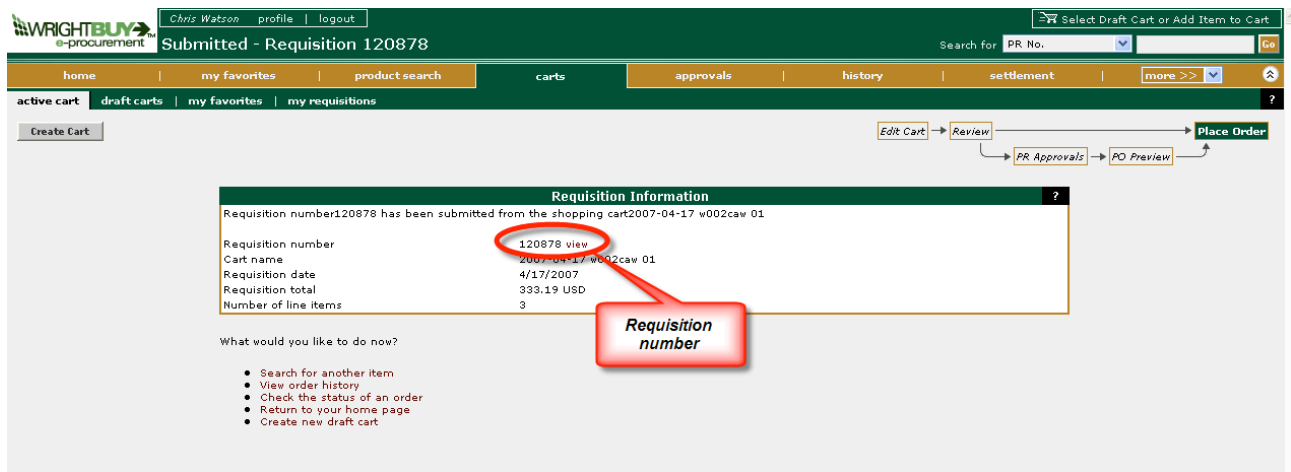
Subtotal: 333.19 | Total: 333.19 USD

NOTE: You can **not** change the price of an item when ordering from a punchout. If you received special pricing, you must use the Non-Catalog Item form to place the order.

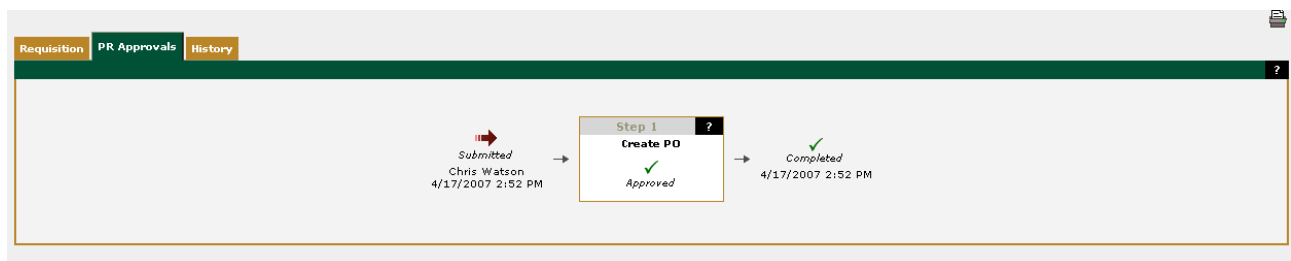
Once all the fields have been completed, click on **Place Order**.



A requisition will be completed and a PO number will be assigned. The order will be sent to the vendor. Click on **View** to see the details of the order.



Note: Since this order was a Procard order, no approvals are required and no Banner purchase order is created. A purchase order starting with an H is issued for procard orders. You can see the Approval process under the **PR Approval** tab.



You can see the entire history of the order under the **History** tab.

Requisition PR Approvals History									
+ Click to filter history									
History									
Results per page: 20		Records found: 3			Page 1 of 1				
Line No	Date/Time	User	Step(s)	Action	Field Name	From	To	Note	
	4/17/2007 2:52 PM	System		Requisition approval process completed					
	4/17/2007 2:52 PM	System	Create PO	PO Created					
	4/17/2007 2:52 PM	Chris Watson		Requisition submitted					

NOTE: You can **not** make changes to the Supplier/Line Items section on an order from a Punchout since that is an external site. You will need to delete the draft cart and start over.

FAVORITES

You can create a list of frequently ordered items to make re-ordering easier using **Favorites**. Select item to be added to Favorites by clicking on the box next to it, then click on **Go** next to **Add to Favorites**.

Select item to be added to Favorites by clicking on the box next to it, then click on Go next to Add to

Supplier / Line Item

Hide line details

For selected line item(s) Add To Favorites Go

Office Depot more info...

Business 1
Po Box 633211, Cincinnati, OH 45263-3211 US

Contract 54321 more info...
Quote number no info...
PO Number H0000026
View/edit by line item...

The items were retrieved from an external supplier site, therefore your ability to edit or view the items in this application may be limited. Click this message for more details.
The following lines cannot be accessed on the supplier's website. Click this message for more details. Line(s): 1, 2, 3

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1 ✓ JWOD Desktop Calculator, 12ndashDigit more info...	660171	EA	41.25	1 EA	41.25	<input checked="" type="checkbox"/>
Manufacturer Part Number NIB742014844560 Supplier Part Auxiliary ID 660171 more info...		Taxable X Commodity Code OFFEQP		Internal Note no note Internal attachments no note External Note no note Attachments for supplier		
2 ✓ MicroMICR Model TJN-38A (HP Q1338A) Black Toner Cartridge more info...	437256	EA	141.75	2 EA	283.50	<input type="checkbox"/>
Manufacturer Part Number MCMMICRTJN38A Supplier Part Auxiliary ID 437256 more info...		Taxable X Commodity Code OFFEQP		Internal Note no note Internal attachments no note External Note no note Attachments for supplier		
3 ✓ BIC(R) Atlantis(TM) Retractable Ballpoint Pens, Medium Point, 10 mm, Clear Barrel, Blue Ink, Pack Of 12 more info...	323004	DZ	4.22	2 DZ	8.44	<input type="checkbox"/>
Manufacturer Part Number VCGV11-BLU Supplier Part Auxiliary ID 323004 more info...		Taxable X Commodity Code OFFEQP		Internal Note no note Internal attachments no note External Note no note Attachments for supplier		
Supplier subtotal					333.19 USD	
Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.					Subtotal	333.19
					Total	333.19 USD

Add To Favorites

Select the destination folder for this item.

My Favorites

Enter a nickname and default Add to Cart quantity for the item(s).

Edit Selected Names

Supplier	Quantity	Catalog No.	
MicroMICR Model TJN-38A (HP Q1338A) Black Toner Ca	Office Depot	2	437256

Submit Cancel

When the Add to Favorites window pops up, click on **Submit**.

To place an order using the favorites, go to the **Favorites** tab, select the item, and click on **Add to Active Cart**. Review the order and complete fields as needed, then place the order.

Favorites Quick Order Product Search Forms

folder My Favorites

Hold CTRL (Win) or Apple (Mac) key to select multiple products.

Nickname	Qty	Catalog No.
MicroMICR Model TJN-38A (HP Q1338A) Black Toner Ca	1	#437256
Pilot (R) G-2(TM) Pro Retractable Gel Ink Pen, 07 m	3	#704142
Tops (R) Docket (R) Wirebound Writing Pad, 8 1/2quot	3	#346270

Add to Active Cart

NON-CATALOG ORDER

To place an order that is over \$1,000 to any vendor that is not on the Punchout list, use the **Non-Catalog Form** from the Product Search or Forms tab.

First click on **choose supplier** to pick the vendor.

Enter part of the supplier name and click on **Search**. The search is not case sensitive.

Once you have found the supplier, click on **Select**.

*If the supplier is not listed in the system, search for **New Supplier**, and select that as the vendor. Once you are in Review cart, then add the vendor name, address, phone number and fax number to the External Notes when you complete the order.*

After the supplier is selected, enter the items to be ordered. Enter the description, the catalog number if you have one (the catalog number is not required), quantity, unit price and unit of measure (packaging). Select the appropriate commodity code by clicking on the drop down arrow and highlighting the code. If the item has any special characteristics, check the appropriate box.

Non-Catalog Item

Business Furniture Outlet change...

+ Show distribution methods

Enter the description, quantity, unit price, unit, and catalog no if known.

Product Description	Catalog No.	Quantity	Price Per Unit	Packaging
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	EA

255 characters remaining expand | clear

- Hide product details

Commodity Code

Click on the drop down arrow to select the commodity code.

- ☐ Controlled substance
- ☐ Green
- ☐ Hazardous material
- ☐ Radioactive
- ☐ Rad Minor
- ☐ Select Agent
- ☐ Toxin

If the item has any of these characteristics, check the appropriate boxes.

If you have more than one item, click on Save and Add Another. If you are done adding items, click on Save.

Save and Close Save and Add Another Close

If you have more items to order, after each item's information is entered, click on **Save and Add Another** and the completed items will be listed at the top of the box.

Non-Catalog Item

Recently added items:

Supplier Name	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity
Business Furniture Outlet	30 X 60 Table, Finish WSRT		EA	1,000.00	1 EA
Business Furniture Outlet	Office chairs, Nickel fabric		EA	500.00	4 EA

Business Furniture Outlet change...

+ Show distribution methods

Product Description	Catalog No.	Quantity	Price Per Unit	Packaging
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	EA

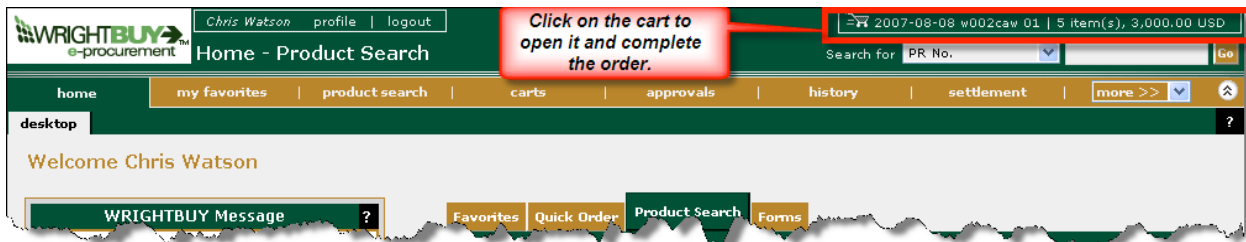
255 characters remaining expand | clear

- Hide product details

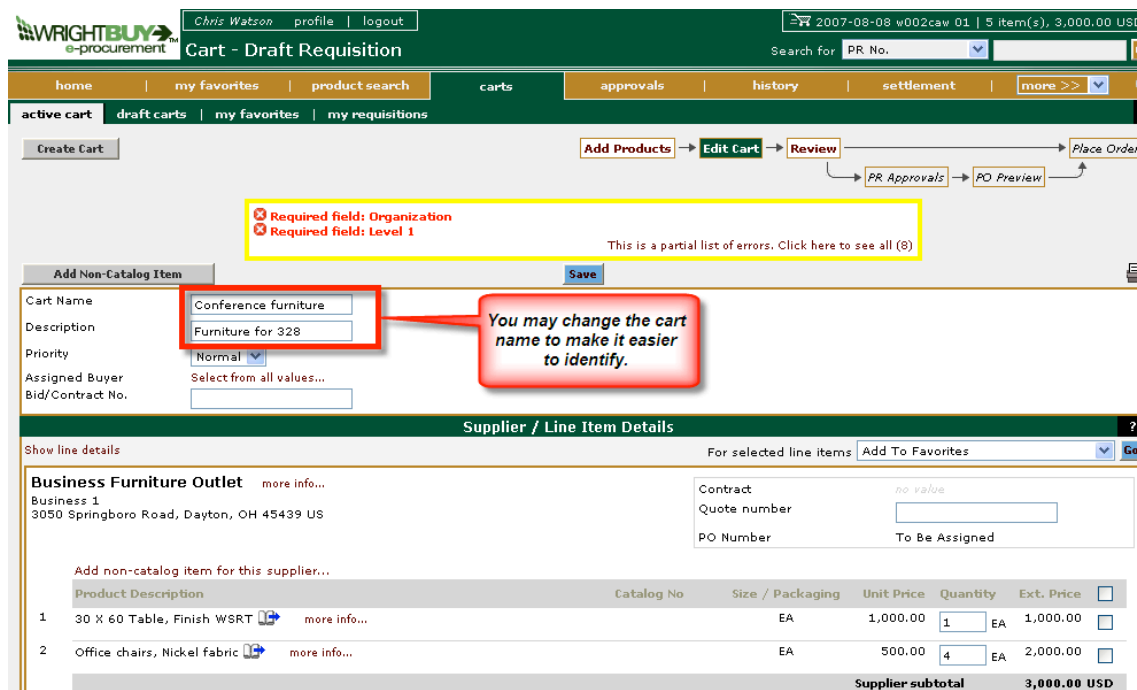
Click on **Save and Close** when all the items have been entered.

Save and Close Save and Add Another Close

After the window closes, you are returned to the WrightBuy desktop and the items have been added to your cart. To complete the order, open the cart by clicking on it in the top right corner.



If you wish, you may now change the Cart Name and Description, then click on **Save**.



Next, click on **Review** to complete the order. Complete the areas that are highlighted and make any changes as necessary by clicking on **Edit** for each section and then clicking on **Save**.

You can add **internal** or **external** notes and attachments.

Internal notes or attachments are only able to be viewed on the requisition within the WrightBuy system. *Note: Accounts Payable does not have access to WrightBuy.*

External notes will be transferred to the purchase order in Banner. This would include notes to the Buyer, Supplier, and Accounting. Attachments will fax with the purchase order to the vendor.

If you selected New Supplier, this is where you would enter the vendor information.

WRIGHTBUY e-procurement Chris Watson profile | logout Conference furniture | 5 item(s), 3,000.00 USD

Summary - Draft Requisition Search for PR No. [] Go

home | my favorites | product search | carts | approvals | history | settlement | more >>

active cart | draft carts | my favorites | my requisitions

Create Cart Add Products Edit Cart Review PR Approvals PO Preview Place Order

Required field: Organization
Required field: Level 1 This is a partial list of errors. Click here to see all (8)

Add Non-Catalog Item

Requisition PR Approvals PO Preview

Summary Shipping Billing Accounting Codes Supplier Info

Hide header

General				Shipping				Bill To			
Cart Name	Conference furniture	edit		Ship To	edit			Wright State University			
Description	Furniture for 328			Attn: Lisa Bleeke				Attn: Accounts Payable			
Priority	Normal			Building: Dunbar Library				3640 Colonel Glenn Highway			
Prepared by	Chris Watson			Room: Room 120				301 University Hall			
Prepared for	Chris Watson			WSU Central Receiving				Dayton, OH 45435-0001			
Assigned Buyer	no value			3640 Colonel Glenn Hwy				United States			
Bid/Contract No.	no value			Dayton, OH 45435-0001							
				United States							

Delivery Options Expedite X Best Carrier-Best Way Ship Via no value Req Delivery no value View/edit by line item...

Credit Card Info No credit card has been assigned. edit

Billing Options Accounting Date no value edit

Look up - Accounting Codes

WSU_Index	WSU_Fund	WSU_Organization	WSU_Account	WSU_Program	WSU_Activity	WSU_Location
no value	no value	no value	no value	no value	no value	no value

Accounting Codes

Chart	Fund	Organization	Account	Program	Activity	Location
W	190000	no value	no value	40010	no value	no value
W	Unallocated Current General Funds	Required field	Required field	Libraries		

View/edit by line item... edit

Internal Notes and Attachments External Notes and Attachments

Internal Note no value edit

Internal attachments no value

add attachment...

You can add an internal note or attachment, which is only available to be seen in WrightBuy.

Note to all Suppliers no value

Attachments for all suppliers no value

add attachment...

You can add an external note or attachment which will be transferred to the purchase order in Banner.

Supplier / Line Item Details

Hide line details For selected line items Add

Business Furniture Outlet more info...

Business 1

3050 Springboro Road, Dayton, OH 45439 US

Contract no value

Quote number no value

PO Number To Be Assigned

View/edit by line item...

Add non-catalog item for this supplier...

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 30 X 60 Table, Finish WSRT more info...		EA	1,000.00	1 EA	1,000.00
Taxable					
Commodity Code FURNGEN					
Internal Note no note					
Internal attachments no note					
add attachment...					
External Note no note					
Attachments for supplier no note					
add attachment...					
2 Office chairs, Nickel fabric more info...		EA	500.00	4 EA	2,000.00
Taxable					
Commodity Code FURNGEN					
Internal Note no note					
Internal attachments no note					
add attachment...					
External Note no note					
Attachments for supplier no note					
add attachment...					

Supplier subtotal 3,000.00 USD

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal 3,000.00
Total 3,000.00 USD

Review the entire requisition and make any changes as needed. The entire order may be charged to one FOAPAL or you can split the entire order among multiple FOAPALs (by % of price or % of quantity). You can also charge individual items to different FOAPALs by using the **Accounting Codes** tab (which also has the added options of by amount of price or amount of quantity).

WrightBuy e-procurement Summary - Draft Requisition

Classroom Tables | 14 item(s), 11,018.00 US

home | my favorites | product search | carts | approvals | history | settlement | more >>

active cart | draft carts | my favorites | my requisitions

Create Cart

Add Products → Edit Cart → Review → PR Approvals → PO Preview → Place Order

Requisition | PR Approvals | PO Preview

Summary | Shipping | Billing | **Accounting Codes** | Supplier Info

Hide header

General		Shipping	Billing
Cart Name	Classroom Tables	Ship To	Bill To
Description	Instruction Room	Attn: Lisa Bleeke	Wright State University
Priority	Normal	Building: Dunbar Library	Attn: Accounts Payable
Prepared by	Chris Watson	Floor: 120	3640 Colonel Glenn Highway
Prepared for	Chris Watson	WSU Dept Direct	301 University Hall
		3640 Colonel Glenn Hwy	Dayton, OH 45435-0001
		Dayton, OH 45435	United States
		United States	
		Delivery Options	Credit Card Info
		Expedite	No credit card has been assigned.
		Ship Via	Billing Options
		Req Delivery	Accounting Date
			no value

View/edit by line item...

Look up - Accounting Codes

WSU_Index	WSU_Fund	WSU_Organization	WSU_Account	WSU_Program	WSU_Activity	WSU_Location
no value	no value	no value	no value	no value	no value	no value

Accounting Code

You can search values for any FOAPAL field by clicking on **Select from all values**. This will bring up a search box where you can enter part of a FOAPAL number or a description to get search results. You can then select the one you need and it is automatically filled in on the order. *This way is highly suggested in order to prevent typing errors or using invalid account codes.*

Accounting Codes

Chart	Fund	Organization	Account	Program	Activity	Location	add split
Select from profile values... Select from all values...	100000 Select from profile values... Select from all values...	290000 Select from profile values... Select from all values...	Select from all values...	40010 Select from profile values... Select from all values...	Select from all values...	Select from all values...	

Save Cancel

You may search a list of valid values for any field.

Complete the fields and Click on Save.

You can use the WSU Index by using the **Look up – Accounting Code** to find valid combinations of fund, org, and program which is especially helpfully with grant and foundation funds. Click on **Edit** next to **Look up**. Enter the WSU Index. Then click on **recalculate/validate values** which will return the appropriate fund, organization, and program, then click **Save**. *You will need to enter these values in the Accounting Codes fields.*

Look up - Accounting Codes

WSU_Index	WSU_Fund	WSU_Organization	WSU_Account	WSU_Program	WSU_Activity	WSU_Location	add split
666272 Select from all values...					Select from all values...	Select from all values...	

recalculate / validate values

Save Cancel

Enter the WSU Index and click on recalculate/validate values.

You may also make changes to a Non-Catalog cart such as changing quantity of items or removing items from the cart. This can not be done on Punchouts.

Supplier / Line Item Details

Hide line details For selected line item: **Remove Selected Items** **Go**

Business Furniture Outlet [more info...](#)
Business 1
3050 Springboro Road, Dayton, OH 45439 US

To edit the item, click on the product description.

Add non-catalog item for this supplier...

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1 Vela Series Table, 24 X 72Form Modesty Panel, 1 Henri Power module, Wire mesh legway covers, Laminate - 4669-60 Natural TigrisPaint & PVC EB Ebony more info...	VELA2472	EA	799.00	12 EA	9,588.00	<input type="checkbox"/> edit
Taxable X Commodity Code FURNGEN		Internal Note <i>no note</i> Internal attachments add attachment...				
		External Note <i>no note</i> Attachments for supplier add attachment...				
2 Vela Series Table, 24 X 36Form Vela Modesty Panel, 1 Henri Power moduleWire mesh legway coversLaminate - 4669-60 Natural TigrisPaint & PVC - EB Ebony more info...	VELA2436	EA	715.00	2 EA	1,430.00	<input type="checkbox"/> edit
Taxable X Commodity Code FURNGEN		Internal Note <i>no note</i> Internal attachments add attachment...				
		External Note <i>no note</i> Attachments for supplier add attachment...				

Supplier subtotal 11,018.00 USD

You can remove line items by selecting the box next to the item and clicking on Go (next to Remove Selected Items).

You can change the quantity of an item by clicking on Edit.

Once the order is complete, click on **Place Order**.

Requisition Information

Requisition number121237 has been submitted from the shopping cartClassroom Tables

Requisition number	121237 view
Cart name	Classroom Tables
Requisition date	4/19/2007
Requisition total	11,018.00 USD
Number of line items	2

A box will appear with the requisition number and a link to View it.

Click on **View** to check the status of the order. Then click on **PR Approvals** to check the approval process for the order.

Requisition **PR Approvals** **PO Preview** **History**

Submitted Chris Watson 4/19/2007 12:47 PM

Step 1 **Banner System Validation** **Approved** **System**

Step 2 **Level 2 Review** **Active**

Step 3 **Level 3 Review** **Future**

Step 4 **General Accounting Review** **Future**

Step 5 **Buyer Review** **Future**

Step 6 **Create PO** **Future**

Completed

This shows the order is awaiting approval by the Level 2 Reviewer.

There will be multiple Review Levels and each must be approved before it is active on to the next level. Once the form has been approved by that level, the approvers name will appear in the box.

- Banner System Validation just checks that *valid* FOAPAL elements have been used. It does not check for an *appropriate* FOAPAL being used for the commodities.
- The Organization and Level 1, 2, and 3 Reviewers were established by the department's Business Manager.
- Workflow Reviewers will appear if the order is using Foundation or Grant funds.
- IT Review will appear if the order is for computer equipment not purchased through Pomeroy or Apple.
- Buyer Review will appear for Non-Catalog Form orders and Punchout orders over \$25,000.
- General Account Review (Controller's Office) will appear on all orders.
- Printing Services will review orders for copiers. (These should only be purchased through Printing Services.)
- Environmental Health & Safety will review forms if they include hazardous chemicals.
- Lab Animal Resources (LAR) will review orders involving live animals. (These should only be purchased through LAR.)

Any approver may make necessary changes or corrections to the order as it moves through the review process.

Once all of the Reviews have been approved, a Banner purchase order will be created and the Banner purchase order number will be added to the form in WrightBuy under the Supplier section.

Supplier / Line Item Details

Hide line details

Business Furniture Outlet more info...
Business 1
3050 Springboro Road, Dayton, OH 45439 US

The Banner purchase order number is added to the requisition when the order has been completely approved.

For selected line items Add To Favorites Go

Contract
PO Number P0003063 View/edit by line item...

OTHER FORMS

Three other forms are used for special purposes, but they are similar to the Non-Catalog Form.

Standing/Blanket Order

Used for creation of standing orders and blanket orders. The requisition will pass to Banner as a requisition, not a purchase order. Purchasing creates the purchase order using the existing number sequence for standing and blanket orders.

Include the dates covered for the standing/blanket order in the External notes.

WrightBuy e-procurement

Chris Watson profile logout

2007-05-01 w002caw 01 | 0 item(s), 0.00 USD

Search for PR No.

home my favorites product search carts approvals history settlement more >>

desktop

Accessed from Favorites

Available Actions: Add To Active Cart Go

Standing/Blanket

Supplier Info

Search

Supplier Name

Supplier Phone

General

Cart Name Maintenance

Description Maintenance

Priority Normal

Prepared by Chris Watson

Prepared for Chris Watson

Shipping

Ship To

Attn: Lisa Bleake

Building: Dunbar Library

Room: Room 120

WSU Central Receiving

3640 Colonel Glenn Hwy

Dayton, OH 45435-0001

United States

Delivery Options

Expedite

Ship Via

Req Delivery

Billing

Bill To

Wright State University

Attn: Accounts Payable

3640 Colonel Glenn Highway

301 University Hall

Dayton, OH 45435-0001

United States

Credit Card Info

No credit card has been assigned.

Billing Options

Accounting Date

Look up - Accounting Codes

WSU_Index WSU_Fund WSU_Organization WSU_Account WSU_Program WSU_Activity WSU_Location

Accounting Codes

Chart Fund Organization Account Program Activity Location

Internal Notes and Attachments

Internal Note

Internal attachments

add attachment...

External Info

Note to all Suppliers

Standing order

Covers 7/1/07 - 6/30/08

Replaces 73809999

expand | clear

Save Cancel

Hide line details

View/edit by line item...

In May or June, if you need to change the order date for a standing/blanket order to move it to the next fiscal year, you can change the date by editing it under Billing Options. The date you enter must be an open fiscal period. Click on **Edit** next to **Billing Options**.

Requisition

PR Approvals PO Preview

Summary Shipping Billing Accounting Codes Supplier Info

Hide header

General

Cart Name 2007-04-20 w002caw 02

Description Instruction Room

Priority Normal

Prepared by Chris Watson

Prepared for Chris Watson

Shipping

Ship To

Attn: Lisa Bleake

Building: Dunbar Library

Floor: 120

WSU Dept Direct

3640 Colonel Glenn Hwy

Dayton, OH 45435

United States

Delivery Options

Expedite

Ship Via

Req Delivery

Billing

Bill To

Wright State University

Attn: Accounts Payable

3640 Colonel Glenn Highway

301 University Hall

Dayton, OH 45435-0001

United States

Credit Card Info

No credit card has been assigned.

Billing Options

Accounting Date

View/edit by line item...

View/edit by line item...

Change Order Request

Used when a change is needed to an existing purchase order.

The price would be the dollar value of the change to the order. User will submit the Change order via WrightBuy which will pass to the Banner system as a requisition. Purchasing will make the change to the purchase order in Banner and submit it to the vendor. Purchasing will also make the change to the original purchase order in WrightBuy to match Banner.

Be sure to include the original purchase order number in the External notes and the revised purchase order total.

Check Request

“Check only” form is used to request payment for an invoice over \$1,000 which does not require a purchase order. (Wright Way policy #5401.10)

Send the original invoice noting the requisition number to Purchasing. Scan the invoice and attach to external attachments also so that the approvers may view the invoice.

Include the reason no initial order was created in the External notes.

HISTORY

To look for orders in the WrightBuy system, use the **History** tab.

WRIGHTBUY e-procurement

Chris Watson profile | logout

Purchase Requisition Search

Search for PR No. [] Go

home | my favorites | product search | carts | approvals | **history** | settlement | more >>

PR History | my requisitions | receipt history | search exports

by PO No. | **by Requisition** | by Contract

If you are searching for a specific purchase document, include as many of the items below to narrow your results.

Requisition Name []

Requisition No. []

Banner Req Number []

Supplier Name [] Select Supplier

Catalog No. (SKU) []

Filter ☐ Check filter if you want to use the filters below

Results per page 100

Search

Filters

To find your purchase documents quickly and easily, choose a date range to search for purchase documents placed during a specified time frame.

My Orders ☐ My Submitted Orders ☐ Department Orders ☒

Start Date 04/01/2007 (mm/dd/yyyy)

End Date 04/19/2007 (mm/dd/yyyy)

Prepared for Select User

Prepared by Select User

PR Departments

LPS55 Library Public Services

SCAS5 Special Collections and Archives

ULC55 Library Computing Services

ULBA Library Administration

ULT55 Library Collection Services

Only Include PR's From These Departments

-----Show All-----

PR Status

-----Workflow-----

Completed

Pending

Partially Rejected

Rejected

Withdrawn

Include PR's with Any of These Statuses

-----Show All-----

PR Status

With Rejected Lines

With Withdrawn Lines

Only Include PR's with These Statuses

-----Show All-----

Search

You can search by a requisition name or number or a Supplier name in the top box.

If you wish to use the search options in the Filter box, you must click on the **Filter** checkbox in the top section. You can use the Filters to search by date range, by user, or by organization.

COPY TO NEW CART

If you need to reorder or resubmit any Non-Catalog order, you can view the order and then select **Copy to New Cart**. At that point, you can make any editing changes and place a new order.

WRIGHTBUY e-procurement

Chris Watson profile | logout

2007-04-20 v002cav 02 | 14 Item(s), 11,018.00 USD

Summary - Requisition 121218

Search for PR No. [] Go

home | my favorites | product search | carts | approvals | **history** | settlement | more >>

PR History | PR History | **my requisitions** | receipt history | search exports

Available Actions: Copy to New Cart [] Go

You can resubmit any order by selecting Copy to New Cart and completing the order.

Requisition | PR Approvals | **History**

Summary | Shipping | Billing | Accounting Codes | Supplier Info

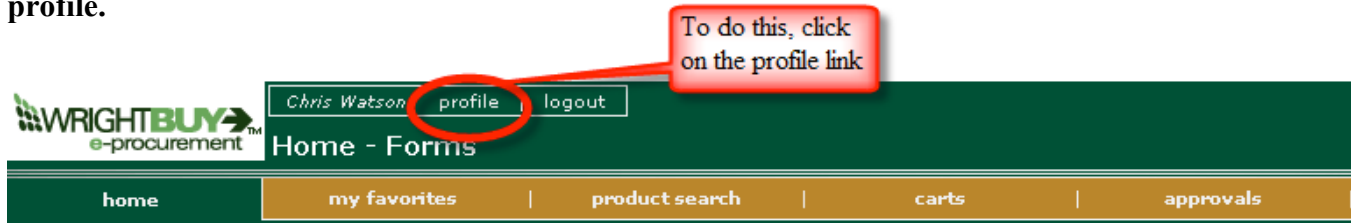
Hide header

General		Shipping		Billing	
Status	✓ Completed (4/19/2007 10:18 AM)	Ship To	Attn: Lisa Bleeke Building: Dunbar Library Floor: 120 WSU Dept Direct 3640 Colonel Glenn Hwy Dayton, OH 45435 United States	Bill To	Wright State University Attn: Accounts Payable 3640 Colonel Glenn Highway 301 University Hall Dayton, OH 45435-0001 United States
Submitted	4/19/2007 10:18 AM	Delivery Options	Expedite X Ship Via Best Carrier-Best Way Req Delivery no value	Credit Card Info	Cardholder Name Test User Card Number XXXXXXXXXXXXXXX1111 Card Security Code XXX Expiration Date 12/2007
Card Name	Admin supplies			Billing Options	Accounting Date no value
Description	Jones order				
Priority	Normal				
Prepared by	Chris Watson				

View/edit by line item...

PROFILE

The first time you login in, you may want to set some of your preferences and default values in your **profile**.



The User profile options include choices to:

Set preferences on receiving e-mail notices under **E-mail Preferences**.

Event	Enabled
PR submitted into Workflow	<input type="checkbox"/>
PR pending Workflow approval	<input checked="" type="checkbox"/>
PR Workflow Notification available	<input type="checkbox"/>
PR line item(s) rejected	<input type="checkbox"/>
PR rejected	<input checked="" type="checkbox"/>
PR Workflow complete / PO created	<input type="checkbox"/>
PO submitted into Workflow	<input type="checkbox"/>
PO line item(s) rejected	<input type="checkbox"/>
PO rejected	<input type="checkbox"/>
PO Workflow complete	<input type="checkbox"/>
PO Requires Receipt notice	<input type="checkbox"/>
PO sent to supplier	<input type="checkbox"/>
PO line item Backorder notice	<input type="checkbox"/>
PO line item Cancellation notice	<input type="checkbox"/>
Search Result Export Confirmation	<input type="checkbox"/>
Contract Tier Exceeded	<input type="checkbox"/>
Contract Effective / Renewal / Expiration Event	<input type="checkbox"/>
Stock Order line item Replenishment Notice	<input type="checkbox"/>
Stock Order line item Backorder Notice	<input type="checkbox"/>
PO Line Item Ship Notice	<input type="checkbox"/>
Cart Assigned Notice	<input type="checkbox"/>

Save

The **Purchasing** profile allows you to set default FOAPAL information under **Custom Fields**.

You can also set up *Ship to* address defaults under **Addresses**.

Chris Watson profile logout

My Profile

home my favorites product search carts approvals history settlement profile

User Settings Purchasing Permissions History

Custom Fields Purchasing/Approval Limits Payment Options **Addresses** Product Views Punchout Access

Custom Field Name	Default Value	Description	Edit Values
Account		No Default Value	Edit
Activity		No Default Value	Edit
Chart	W	W	Edit
Commodity Code		No Default Value	Edit
Fund	190000	Unallocated Current General Funds	Edit
Location		No Default Value	Edit
Organization	290000	University Libraries-Administration	Edit
Program	40010	Libraries	Edit
WSU_Activity		No Default Value	Edit
WSU_Index		No Default Value	Edit
L WSU_Account		No Default Value	Edit
L WSU_Fund		No Default Value	Edit
L WSU_Organization		No Default Value	Edit
L WSU_Program		No Default Value	Edit
WSU_Location		No Default Value	Edit

CAPITAL EQUIPMENT

Capital equipment includes all movable items that have a probable useful life of two or more years, have an original cost or value of \$5,000 or more, and are neither permanently attached to a building or its utility systems nor incorporated into the building at the time of initial construction or during later modifications. The total cost includes all expenditures incurred in acquiring the equipment and preparing it for use. This would include the purchase price, freight and handling charges, insurance on the equipment while in transit, the cost of special foundations required, assembly and installation costs, and the cost of conducting trial runs. Capital equipment also includes computer software if it is the computer's main operating system. The software is not tagged but is included in the cost of the computer system at the time it is ordered.

For all orders with capital equipment:

- The *account* code must be 794500. This can be entered in the document FOAPAL or for the FOAPAL for the item under Accounting Codes.
- The *location* code must be entered. This can be entered in the document FOAPAL or for the FOAPAL for the item under Accounting Codes. If the room and building are not part of the location code list already in Banner, please have your Business Manager request the location be added using a **Financial Account, Program, Activity or Location Request** form that can be found on the Office of the Controller's webpage.
- In the description include:
Description of capital asset – This is what will identify this equipment purchase on your capital equipment inventory.
Tag Information – List how many tags are needed, which line items make up each tag, etc. The more information you provide will help facilitate the capital equipment process.
Final Location for this product.

PO NUMBERS

WrightBuy and Banner will both generate PO and Requisition numbers. Listed below is a chart on how to identify the numbers and action in each system.

	WrightBuy	Banner
Requisition	Number begins 6xxxxxx	Converted to Banner Requisition Rxxxxxxx for standing/blanket orders and change orders
Purchase Order	Number begins 3xxxxxx	Converted to Banner PO Pxxxxxxx for regular non-procard and check request orders
Procard Order	Purchase Order begins Hxxxxxxx	Not posted to Banner at all, monthly PNC feed will include charges

ERROR MESSAGES

If you receive any type of error message, please take a screen shot of the message using the keys ALT and PRT SCR, then paste the screen shot into an e-mail and send to purchasing@wright.edu or contact Purchasing at 775- 2411.

DESTOP RECEIVING

NOTE - WILL ADD LATER