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Steps to Create a New Folder

Manage Favorites
Access UCIBuy

Step 1: Access the Portal

A. Go to https://portal.uci.edu, login and navigate to Finances/KFS.
B. In the Purchasing portlet, navigate to KFS Purchasing and select UCIBuy – Shop Catalog.
UCIBuy Dashboard Overview

Top Navigation Bar

- **User’s Name**: Auto-populates based on the login information.
- The arrow next to the user’s name is used to view a drop-down menu that displays **My Recently Completed Carts**. Information on completed carts is addressed on Step 4.

Selecting the Shopping Cart icon allows user to View My Cart or Checkout

Fly Out Menu

- The **Home** icon takes users back to the home page.
- The **Shop** icon allows users to view **Carts and Orders** as well as perform searches by **Keyword** and **Catalog Number**. (Shortcut = Alt + P).
- The **Documents** icon allows user to view and print completed Purchase Orders.
General Search Bar
- Described in detail in Product Search

Shopping Tips & Links
- Displays helpful definitions, tips and reference guides

**ADDITIONAL INFO LINKS:**

- Shopping & Searching Tips
- Search Results & Filters
- Creating & Using Favorites

Shop All Catalogs by Commodity
- Features available supplier catalogs, organized within shopping showcase
- The supplier’s commodity offering is denoted directly below each supplier logo/icon.
- The plus sign (+) denotes a Punchout supplier.
Supplier Updates & Promos

● Posts the latest campus indicatives and supplier promotions

Sustainable Corner, Events and Procurement Help

● Learn about current sustainability initiatives and products, upcoming events and links to various procurement topics

In collaboration with Environmental Health & Safety (EH&S) and Procurement Services, UCI Buy is now offering a streamlined solution for ordering recommended and approved ergonomic furniture and products from our contracted supplier.
Product Search

General Search Bar
A. Type in the product or descriptors in the search field and select Go.
   o For best results, use the default setting ‘Everything’ in the Shop field drop down menu.
B. System generates broad search results from all hosted catalog content, allowing for comparison shopping.

Dedicated Supplier Search or Punchout Supplier
A. Click on the Supplier tile containing the logo to bring up a dedicated search bar that can be used to search for items from that specific supplier only.
B. For Punchout suppliers (denoted with the + sign), select Punchout to access the contracted catalog.
   a. Each Supplier’s Punchout site differs slightly, in appearance and functionality, but typically resembles the supplier’s public website.
   b. The UCIBuy Punchout in the upper left corner of the page indicates that the user is still within UCIBuy.
   c. The Cancel Punchout button in the upper right corner of the page cancels the Punchout session and returns the user to the UCIBuy Homepage.
   d. Search for products and add items to the Punchout cart.
   e. Proceed to checkout within the Punchout (this process may vary by Supplier) and transfer the shopping cart back to UCIBuy.
C. When returning from a Punchout supplier, the user lands on the Cart Review page. Select Continue Shopping to shop for additional items within UCIBuy.

Note: Some suppliers offer a dual enablement. Clicking on the tile will open up a dedicated supplier search bar for Hosted content (A) as well as a Punchout link (B).
Filters and Favorites

A. Add keywords to the result set to further refine your search.
B. Filter by supplier, product flag, and more.
   ○ Click the icon to apply multiple filters.
C. Sort by any of the options listed.
   ○ Sorting should be the last step after entering search criteria and filters.
D. The **Add Favorite button** saves your commonly purchased items to your favorite’s folder.
   ○ See Favorites Chapter for more details.
E. Select **Add to Cart** to place the item in your cart.
Comparison Shopping

A. On the search results page, users can **Sort by** selective criteria or change the number of **Results per page**.

B. To compare items, select the **compare** link located under **Add to Cart**.
   - Users can compare like products from different suppliers or similar products from the same supplier. The example to the right displays like products (Kimwipes) from different suppliers (i.e. Sigma-Aldrich and Office Solutions).
   - After selecting on **compare**, the text changes to **remove**, providing the option to remove the product from comparison.
   - It’s recommended to pick no more than five items to compare at a time for ease of viewing.
   - Select the blue **Compare Selected** button to view the product comparison screen. **Note:** **Compare Selected** button is grayed out when no items are selected to compare.
C. The **Product Comparison Shopping** page displays information about each product. The following criteria may be useful when comparing products:

- **Price per UOM**
- **Packaging UOM**

**Note:** Additional Supplier flags that denote Small Business (SB), California based (CA), price includes shipping, etc.

D. Product(s) can be added to the shopping cart in two ways from the comparison screen. In the **Add to Cart** row, change or verify quantity and select **Add to Cart**. Or, check the box for the selected item in the **Select** row and select **Go**. *This updates the shopping cart subtotal in the upper right corner.*

E. Select **<<Back to Search Results** (located at the top and bottom of the page) to continue shopping.
Note: Also compare similar products from the same supplier, e.g. gel pen versus a bic pen.
Add to Cart

Another way to add items to the cart (aside from the Product Comparison Shopping screen) is to use the main shopping page.

A. Ensure quantity is correct.
B. Select Add to Cart. The shopping cart in the upper right corner reflects the new subtotal and the following confirmation message appears below the item:

C. Users can select the drop-down arrow to Add to Draft Cart. If the user has multiple draft carts, this feature is useful for items that should be ordered at a later date or in a separate cart.
**Review Cart**

A. Select the shopping cart [0.00 USD] icon and select **View My Cart**.

B. The **Name this cart** field defaults to the user’s UCNetID and date. The user can change this description (30 characters max) to identify the purchase. This description auto-populates in the KFS Requisition.
   ○ Select **Update** to save changes

C. Review cart—check that the quantity and the product are correct. A few things to note when viewing the cart:
   ○ Suppliers appear in alphabetical order.
   ○ Quantity *cannot* be changed for products ordered from Punchouts.
     ■ Additional quantities/items can be added by returning to the Punchout catalog and repeating the Punchout checkout process.
     ■ To edit a Punchout item to a lesser quantity, delete the product in the UCIbuy cart, return to the Punchout, and select the appropriate quantity for the item.
   ○ Quantity *can* be changed for products ordered from a hosted catalog.

D. Select the **Add to Favorites** button to add items to use for future orders ([more information about Favorites](#)).
   ○ Do not add items from Punchouts to favorites because pricing and availability fluctuate.

E. **Remove** deletes the item from the shopping cart.

F. Select **Update** if any changes were made otherwise changes won’t be reflected.
   ○ Punchout note: *Quantity cannot be updated from Punchouts when viewing the cart; users must either delete the quantity and Punchout to order, or Punchout to order additional quantity.*

G. Select **Proceed to Checkout** after reviewing the order and/or all changes have been made.
Create a KFS Requisition

- After selecting on **Proceed the Checkout**, the message to the right appears.
- Select **Create KFS Requisition**.

**Note:** If the UCIBuy cart contained items from multiple suppliers, a separate Rapid Requisition is generated for each supplier. The system displays or “lands” on one Requisition, and additional Requisitions are saved in the user’s Action List.

### Review Document Header

A. Write down the document number (**Doc Nbr**) for future reference.
   - Used to look up the document and appears on the General Ledger.
   - **KFS Rapid Requisition #** populates; however, it is not the same number as a Purchase Order #.

### Review Document Overview Tab

A. Validate **Description** text from UCIBuy.
   - If multiple suppliers were in the UCIBuy cart, the description text will be identical for each Requisition and can be changed as needed, e.g. version 1, version 2, etc.
   - **Note:** The 30 character limit from UCIBuy is extended by 10 characters (40 characters maximum) to allow users to add additional information to better identify a specific Requisition.
   - It is recommended to enter text that will best identify the order for future reference.
Information in the description field populates in the **Action List** under the **Title** column.

**B. Year** defaults to the current fiscal year.

**C. Chart/Org** defaults to the initiator’s home Organization (department) code.

**D. Use 🗿 within the Chart/Org field to change the code. For example, user is purchasing for a different organization. This ensures that the Requisition routes correctly.**

**Review Delivery Tab**

**A. Delivery Campus** defaults to the initiator’s home campus.

- Use to change the campus delivery location. IR (UC Irvine), MC (Medical Center) or SW (Systemwide)

**B. Use 🗼 in the Building field to search for the desired building or off-campus address.**

**C. In the Address 2 field, as a best practice enter Organization (department) name or free form text, as needed, up to 30 characters.**

**D. In the Room field, enter the room number or “NOROOM.”**

- If the selected building contains room numbers, 🗼 appears to assist in locating a room number.

**E. The Delivery To field auto-populates with the initiator’s information, but can be changed using the steps below:**

- Use 🗼 to search for an employee.
- **Phone Number** and **Email** field’s auto-populate with the employee’s information.

**Validate Vendor Tab**

- The **Vendor** tab auto-populates with information from UCIBuy. These fields do not require editing.

**Complete Items Tab**

- All fields in the **Items** tab populate from UCIBuy except the **Accounting Lines**.

**Add Account Information:** There are two different methods to add account information.

- **Method 1:** Use **show** when there is only one line item with one or more account numbers.
- **Method 2:** Use **setup distribution** when there are two or more line items with the same account number.

- This method can also be used if the majority of the items are distributed to one account number and only a few will have a different account number. For
example, account number GF12745 applies to line items 1 – 8, and account number GF12741 applies to line items 9 – 10.

**Review Additional Institutional Info Tab**

- This tab is optional and can be used for department tracking and reporting. It is not transmitted to the vendor.
- Required fields in this section auto-populate with the initiator's default information; however, if the information was changed in the **Delivery Tab** (step 10) then users may need to change the fields within this tab.
- Use or manually type over the fields to enter new information.
- If changes were made, select **save**.

**Complete Notes and Attachments Tab (if applicable)**

A. In the **Note Text** field, type “upload” to indicate an attachment.
   - As a reminder, be sure to make note of an attachment in the **Document Overview** tab Explanation field as well. Attachments uploaded to KFS are not auto-transmitted to the Supplier.
B. In the **Attached File** field, select to upload an attachment to the Rapid Requisition.
   - Examples of attached files include quotes, emails, etc.
   - Never attach documents that contain sensitive information, ex. social security numbers, home addresses, proprietary, copyrighted, health records (HIPAA), etc.
   - Attachments cannot be deleted from the system. If sensitive information was mistakenly attached, contact **KFS@uci.edu** for assistance.
   - If an attachment was mistakenly uploaded and did not contain confidential information, type “disregard attachment” in the **Note Text** field.
   - File must be a PDF and smaller than 5 MB.
C. Select to complete the file upload.

**Calculate and Submit the Rapid Requisition**

A. After all the information is entered, scroll to the end of the Rapid Requisition and select **calculate**.
B. Next, scroll down and select **submit**.
C. A confirmation message appears under the Rapid Requisition header and then routes to the next user in the Rapid Requisition workflow. 

**Note:** Don't forget to complete additional Rapid Requisitions if ordered from multiple suppliers.
Additional Information for APO

A. APO (automatic purchase order) is only available through orders initiated in UCIBuy.
B. All Requisitions exceeding the maximum $5000 APO threshold or containing any restricted item(s) will automatically route to Central Procurement for review and PO approval.
C. The Rapid Requisition document becomes an approved Purchase Order after Fiscal Officer approval, and is then sent automatically to the supplier.
D. Order documentation (if available) is emailed to the Primary Departmental Buyer within the organization.
Favorites

Adding items to Favorites is a convenient feature to easily reorder frequently purchased items.

- **Note**: Use this feature for hosted catalogs only. Punchout items cannot be added to Favorites in UCIBuy—that option may be available in the Supplier’s Punchout site. This ensures that the integrity of the product information is maintained (pricing, availability etc.).

On the Search Results page, add favorite appears beneath the Add to Cart button. After selecting the link, a new window appears.

**Step 1: Edit Item Details**

A. **Item Nickname**: This defaults to the product description but can be changed or renamed. For example, a specific pen for Jane Doe could be nicknamed: Jane’s Pen.

B. **Quantity**: The selected item will default to a quantity of 1, but can be saved to a specific quantity if frequently reordering in that amount. (e.g. always purchase 5 boxes of tissues)

**Step 2: Select Destination Folder**

A. **Personal Favorites**: Users can also create Favorites subfolders. For example, for a specific Lab or Project.

B. **Shared Favorites**: Shared Favorites Folders are helpful because they allow visibility to be shared amongst users in the same department. These folders require setup by an UCIBuy system administrator. Download the Share Favorites Request form. Shared Favorites are managed at the department level via roles and permissions granted at set up.

**Step 3: To add the product to Favorites, either select an existing folder, or create a new folder and select Submit.**
Steps to Create a New Folder

1. Select **New** and select **Top level personal folder**.
2. **Name** the folder and select **save**.
3. A confirmation message appears and select **Close** to return back to the main shopping page.
Manage Favorites

A. Under the general search bar, select **favorites**.
B. From the left menu, select the folder to edit.
   o New folders can be created or deleted.
C. Check individual boxes to modify or select the top check box to highlight all items.
   Options to modify include: **edit, move/copy, delete, add to cart**.
D. **Results per page** can also be adjusted.