



Getting Started

1. **Claim a CNetID** (<http://cnet.uchicago.edu>). Your CNetID and password are your BuySite login.
2. If you are using an email account other than your CNetID@uchicago.edu, set up email forwarding (<http://cnet.uchicago.edu>). Some BuySite notices are sent to your CNetID@uchicago.edu email account, regardless of what you set up as your email address in the BuySite preferences. You must set up this forwarding to receive these notices.
3. Request a BuySite account by asking your Department administration to provide the following information to buysite@uchicago.edu:
 - CNetID
 - Department (or Department and SubDepartment/Section for the larger Departments that make active use of the SubDepartments/Sections)
 - Default approver
 - Are you an approver or requester
4. Arrange for NSIT sponsored or other training. Contact your department Administration for details.

The Fundamentals

1. The URL for BuySite is <http://buy.uchicago.edu>.
2. Log in with your CNetID and password.
3. Set up your user profile ("defaults") from the [Profile] tab. The minimum recommended setup is:
 - **Profile /User Settings/User Identification**
 - Enter your e-mail address
 - **Profile/User Settings/Email Preferences** — activate the following:
 - PR pending Workflow approval (approvers only)
 - PR Workflow Notification available (approvers only)
 - PR line item(s) rejected (requesters and approvers)
 - PR rejected (requesters and approvers)
 - PR Workflow complete / PO created (requesters and approvers)
 - PO sent to supplier (requesters and approvers)
 - PO line item Backorder notice (requesters and approvers)
 - PO line item Cancellation notice (requesters and approvers)
 - **Profile/Purchasing/Custom Fields/Codes**
 - FAS Acct - need at least one, set one as default
 - FAS SubAcct - need at least one, set one as default
 - **Profile/Purchasing/Financial Approvers**
 - If using Financial Approvers, need at least one, set one as default
 - **Profile/Purchasing/Addresses**
 - Ship To - need at least one, set as default
 - Bill To - need at least one, set as default

The Fundamentals (Cont)

4. To create a punch-out requisition:
 - On the [Product Search] tab of the [product search] (or [home]) tab, click the icon for the Desired punch-out supplier
 - Navigate the supplier's web site to select items and add them to the supplier's cart
 - Go to the supplier's "checkout" to return the items to your cart
 - Go to the supplier's "checkout" to return the items to your BuySite cart
 - Complete the Header info, click "Save Updates"
 - Navigate to the "Review" screen (use the buttons at the top right of the screen)
 - Pick appropriate Ship To, Bill To, and (FAS Account) Codes, if different than your defaults, using the corresponding buttons under the Header section
 - Navigate to the "View Workflow" screen (use the buttons at top right of the screen), and fix any errors that are indicated
 - Click "Submit" to send the requisition to your approver
5. To create a requisition for any other supplier:
 - On the [Product Search] tab of the [product search] (or [home]) tab, click "Browse by Supplier"
 - Use the search screen to locate your supplier. (Search hint: entering "bio" will return all suppliers whose name starts with "bio". Enter "*bio*" to find suppliers with "bio" anywhere in their name)
 - Click the icon in the "Type" column to create an item entry form for the supplier
 - Fill in the catalog number (3-character minimum), product description, quantity, unit of measure (use drop-down list only) and price
 - If adding more items, select "Add to Cart and Return" in the Available Actions list (at both the top and bottom of the screen; each list does the same thing, use whichever is more convenient). Click "Go". The item is added to your cart and you are returned to the item entry form to continue adding items
 - If this is your last (or only) item, select "Add to Current Cart" in the Available Actions list. Click "Go". The item is added to your cart and you are taken to the cart screen as described above
 - Complete the Header info, adjust Ship To, Bill To, and FAS Account codes if required, review the workflow, and submit for approval as described above
6. The order is automatically placed with the supplier when it is approved.
7. Log out.