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Access UCIBuy

Step 1: Access the Portal

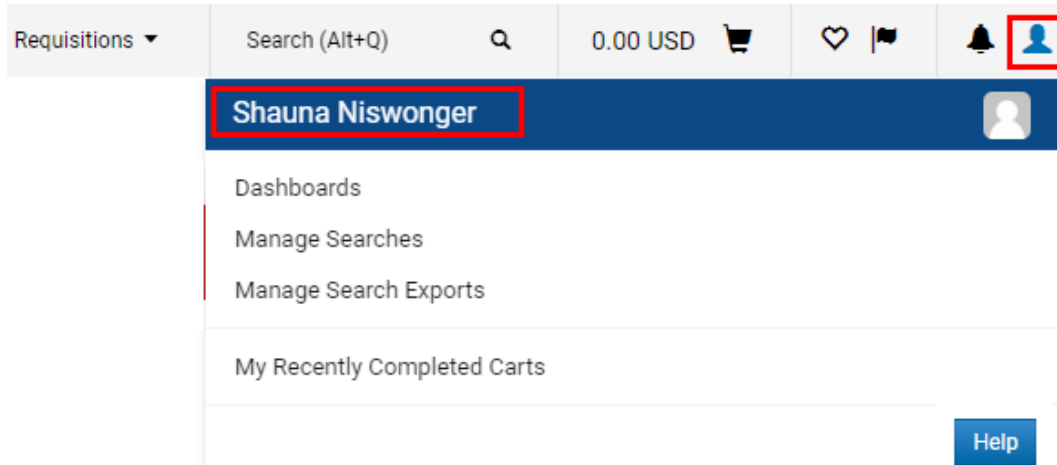
- A. Go to <https://portal.uci.edu>, login and navigate to **Finances/KFS**.
- B. In the **Purchasing** portlet, navigate to **KFS Purchasing** and select **UCIBuy – Shop Catalog**.



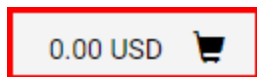
Dashboard Overview

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**.

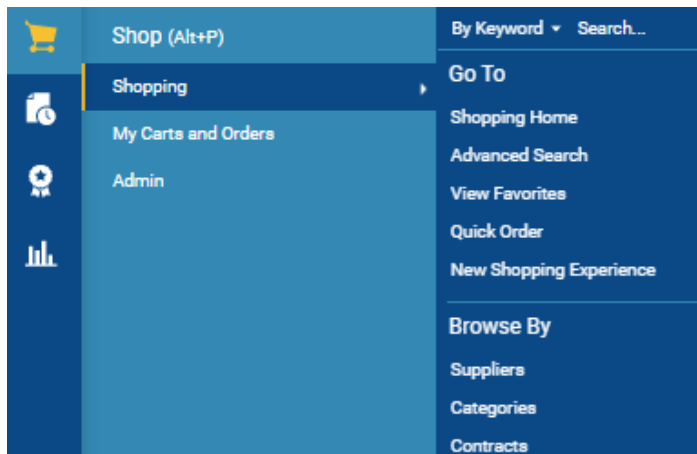


Selecting the Shopping Cart icon allows user to View My Cart or Checkout



Fly Out Menu

- The **Home**  icon takes users back to the home page.
- The **Shop**  icon allows users to view **My Carts and Orders** as well as perform searches by **Keyword** (Shortcut = Alt + P).
- The **Documents**  icon allows users to view and print completed Purchase Orders.



General Search Bar

Simple Search

Shop General Search - All Hosted Catalog Content

Simple Advanced

Search for products, suppliers, forms, part number, etc.

Advanced Search

Simple **Advanced**

Advanced Search Everything ▾

Find Results That Have:

All of These Words	<input type="text"/>	Supplier	<input type="text"/>
Part Number (SKU)	<input type="text"/>	Manufacturer Name	<input type="text"/>
Commodity Code	<input type="text"/>		

Other Options

Exact Phrase	<input type="text"/>	Exclude Words	<input type="text"/>
Any of These Words	<input type="text"/>		








Custom Attributes

- Easy Buy
- EH and S Approved
- MLC
- Zero Waste Item

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.

Computers, Electronics & Peripherals

 + Computers & Peripherals	 + Photo & Video Equipment	 + Computers & Peripherals	 + Electronic Components	 + Cisco Equipment	 + PCs and Printers
 SHARP LASER PRINTERS Laser Printers					

Everyday Essentials

Furniture

Life Sciences | General Lab | Medical Supplies

Maintenance, Repair & Operations (MRO)



Supplier Updates & Promos

- Posts the latest campus indicatives and supplier promotions

Events & Promos

Sustainable Corner, Events and Procurement Help

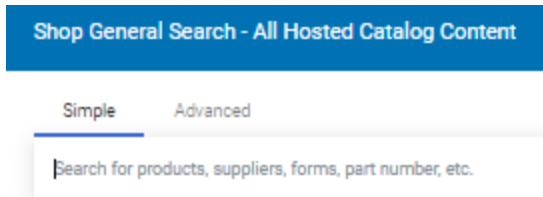
- Learn about current sustainability initiatives and products, upcoming events and links to various procurement topics

Sustainable Corner	Events	Procurement Help
<p>Supporting a Plastic Free Campus</p> <div data-bbox="228 1398 673 1522">  <div style="display: flex; justify-content: space-around;"> <div data-bbox="373 1398 511 1501"> <p>Classic Experience</p>  </div> <div data-bbox="527 1398 673 1501"> <p>New Shopping Experience</p>  </div> </div> </div> <p>All 10 UC campuses are phasing out single-use plastics as part of a bold commitment to achieve zero waste to landfill, furthering their long-established sustainability goals. The new addition to the UC Policy on Sustainable Practices will transition all UCs away from plastic bags in retail and dining locations and eliminate single-use plastic foodservice items and beverage bottles.</p> <p>Under Everyday Essentials, look for the UCI Zero Waste ECOBuy Favorites Catalog for compostable alternatives when making purchases. The ECOBuy favorites are organized in convenient categories and will continue to grow with more offerings. In a general search, look for search results associated with the ECOBuy attribute in support of a plastic free campus!</p> <p>Note: Effective 7.26.21, using the New Shopping Experience (control toggle bottom right of UCIbuy) will display an easy to identify 'green' image on the Favorites Catalog associated with ECOBuy.</p>	<div data-bbox="803 1360 1112 1470">  <p>SUPPLIER SHOWCASE Business Meets Opportunity</p> </div> <p>Supplier Showcase Recap</p> <p>View EVENT PHOTOS</p>	<div data-bbox="1242 1346 1356 1459">  </div> <ul style="list-style-type: none"> • Buyer Directory • Can't Find it in UCIBuy? • Contracts / Agreements • KFS Support • Newsletters • PALCard • Procurement Website • Purchasing Methods Guide • Surplus - Peter's Exchange • UCIBuy Shared Favorites Request Form • UCIBuy Training Guide (.pdf) • UC Learnina Center (UCLC)

Product Search

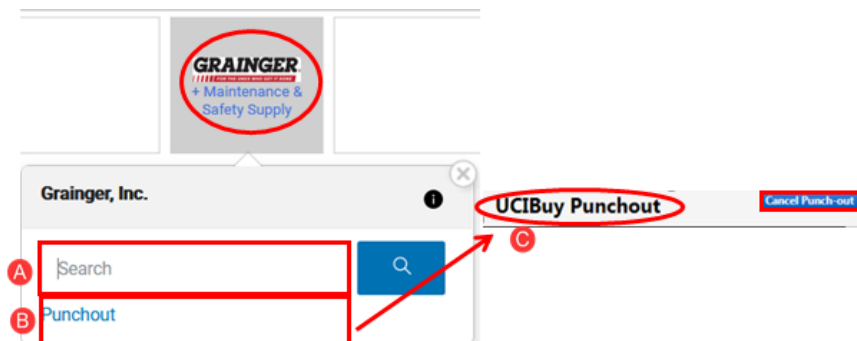
General Search Bar

- Type in the product or descriptors in the search field and select **Go**.
 - 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.
 - Each Supplier's Punchout site differs slightly, in appearance and functionality, but typically resembles the supplier's public website.
 - The **UCIBuy Punchout** in the upper left corner of the page indicates that the user is still within UCIBuy.
 - The **Cancel Punchout** button in the upper right corner of the page cancels the Punchout session and returns the user to the UCIBuy Homepage.
 - Search for products and add items to the Punchout cart.
 - 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 both a Hosted and a punchout catalog (dual enablement) and are identified with a gray background in the tile.

Shopping Cart for SHAINA SIMS C [Continue Shopping](#)

2 Item(s) for a total of **265.40** USD

Name this cart:

[Proceed to Checkout](#)

Filters and Favorites

- A. Add keywords to the result set to further refine your search.
- B. Filter by supplier, product flag, and more.
- C. Sort by any of the options listed.
 - o 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.
 - o See Favorites Chapter for more details.
- E. Select **Add to Cart** to place the item in your cart.

Search Results: 4000+

Simple Advanced A B

Go to: [Favorites](#) | [Quick Order](#) | [Browse: Suppliers](#) | [Categories](#) | [Contracts](#)

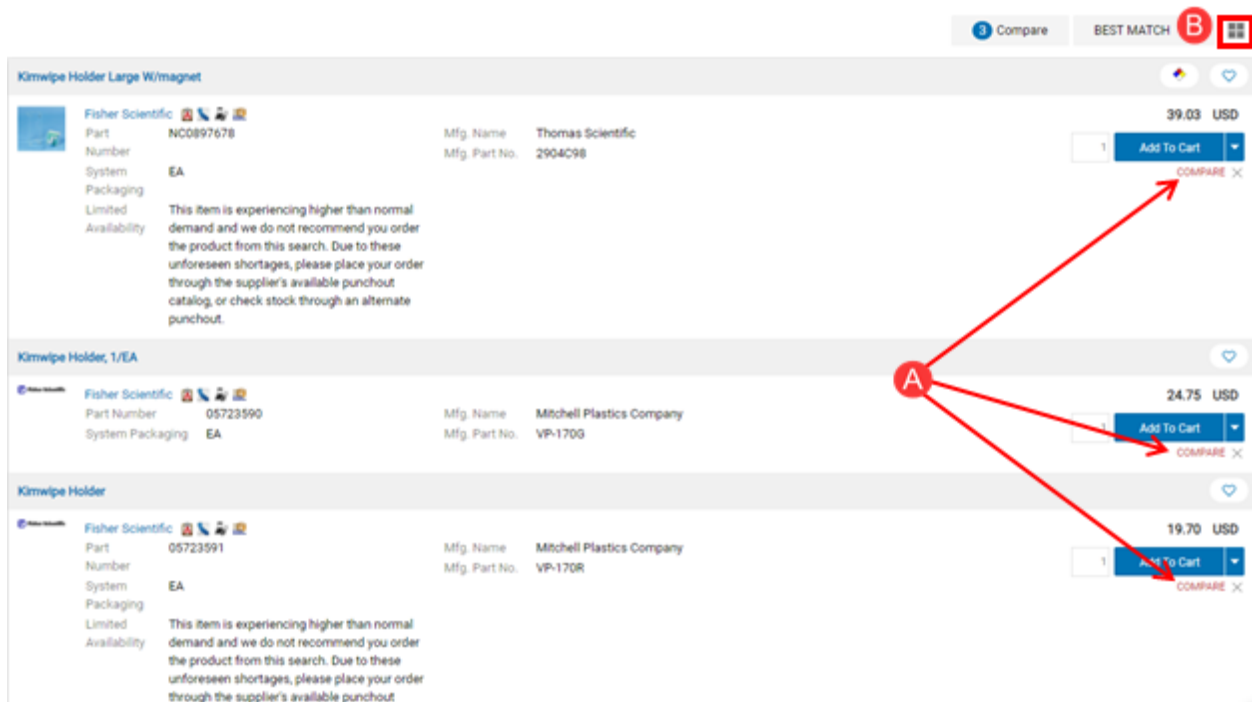
Compare C BEST MATCH

By Product Flag	By Supplier	By Supplier Class	By Category	By Packaging UOM	By Result Type	By Manufacturer
<input type="checkbox"/> Green <input type="checkbox"/> Hazardous material <input type="checkbox"/> Recycled <input type="checkbox"/> Radioactive	<input type="checkbox"/> Fisher Scientific <input type="checkbox"/> VWR International, LLC <input type="checkbox"/> Thomas Scientific LLC <input type="checkbox"/> Neta Scientific, Inc. <input type="checkbox"/> Spectrum Laboratory Products, Inc.					

<p>Elisco Distilling Apparatus Glassware 500ml, High Quality 19/26, Borosilicate Glass, Recommended Application</p> <p>Fisher Scientific Part Number: 928015 System Packaging: EA</p> <p>Mfg. Name: Elisco Scientific Llc Mfg. Part No.: CH0890</p> <p>83.46 USD</p> <p>To Cart</p>	D
<p>Brush, Glassware Cleaning, Foam Tip, 13 OAL. These laboratory brushes feature polypropylene bristles with foam use with wide mouth bottles, graduated cylinders, beakers etc. Width of brush tip is 2. MADE IN USA.</p> <p>Fisher Scientific Part Number: 501310997 System Packaging: EA</p> <p>Mfg. Name: Chemglass Life Sciences Llc Mfg. Part No.: CG-1144-01</p> <p>8.48 USD</p> <p>Add To Cart</p>	E
<p>BUCHI Rotavapor R300, Glassware Assembly Type: Cold Trap, Description: Manual lift system, Capacity: 5 L, Model: R300, Rotary Evaporator, Speed: 10 to 280 rpm, Temperature Range: Ambient to 220 deg.C, Timer: No, For Use With: Vacuum pump, Height: 947 mm.</p> <p>Fisher Scientific Part Number: 05000455 System Packaging: EA</p> <p>Mfg. Name: BUCHI CORPORATION Mfg. Part No.: 11R300152C002</p> <p>5,248.80 USD</p> <p>Add To Cart</p>	D
<p>SP Scientific Freestanding Glassware Washer DI Rinse 120V, Certifications/Compliance: MET Labs, Depth: 24.5 in., 63cm, Display: Digital, For Use With: Washing Lab Glassware, Hertz: 60Hz, Voltage: 120V, Electrical Requirements: 120V, Height: 96.5cm, Stain</p> <p>Fisher Scientific Part Number: 15365213 System Packaging: EA</p> <p>Mfg. Name: Sp Industries Inc Mfg. Part No.: UCW-NA10101</p> <p>5,685.14 USD</p> <p>Add To Cart</p>	E
<p>BUCHI Rotavapor R300, Glassware Assembly Type: Cold Trap, Description: Electronic lift system, Capacity: 5 L, Model: R300, Rotary Evaporator, Speed: 10 to 280 rpm, Temperature Range: Ambient to 220 deg.C, Timer: No, For Use With: Vacuum pump, Height: 947</p>	

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.

Compare 3 Items			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Add to Cart	<input type="text" value="1"/> Add To Cart	<input type="text" value="1"/> Add To Cart	<input type="text" value="1"/> Add To Cart
Product Image			
Product Details	Kimwipe Holder Large W/magnet	Kimwipe Holder	Kimwipe Holder, 1/EA
Catalog No.	NC0897678	05723591	05723590
Price	39.03 USD	19.70 USD	24.75 USD
Supplier	Fisher Scientific	Fisher Scientific	Fisher Scientific
Category	Cleaning rag dispenser	Cleaning Equipment and Accessories	Cleaning Equipment and Accessories
UOM	---	---	---
Price per UOM	39.03 USD / unit	19.70 USD / unit	24.75 USD / unit
Product Size	---	---	---

Note: Also compare similar products from the same supplier, e.g. gel pen versus a bic pen.

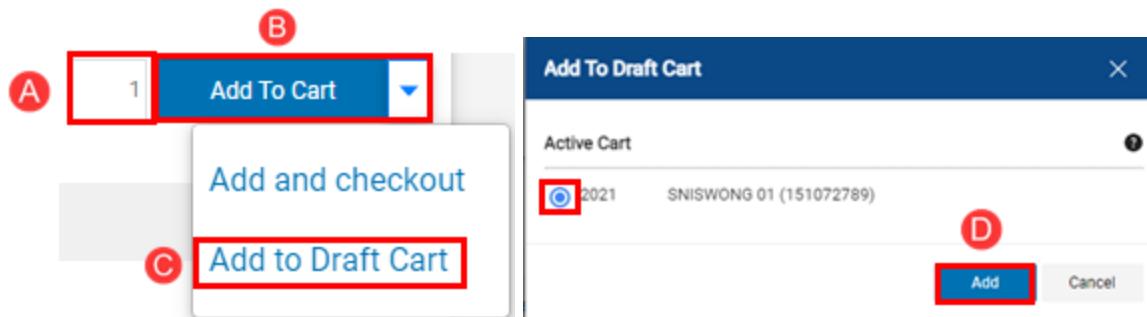
Add to Cart

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:

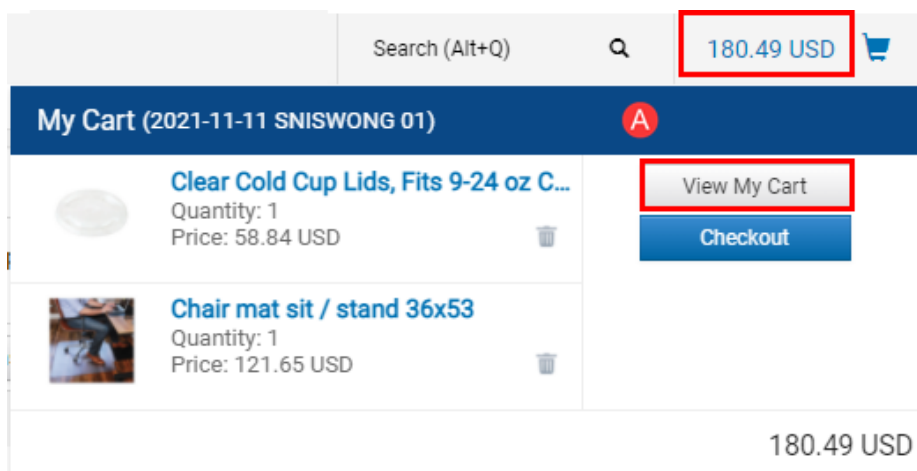
ACTIONS FOR 1 SELECTED ITEMS

- 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.
- D. Select Add



Review Cart

- A. Select the shopping cart  icon and select **View My Cart**.
- B. The **Name this cart** field defaults to the user's UCInetID 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:
 - If ordering from multiple catalogs, suppliers appear in alphabetical order. You can also continue shopping by using the search bar for hosted catalogs.
 - In general, quantities *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 **Proceed to Checkout** after reviewing the order and/or all changes have been made.



Details

For
Shauna Niswonger

Name **B**
2021-11-11 SNISWONG 01

Estimate (180.49 USD)

Total: 180.49

Shopping Cart • 151072789

F Proceed To Checkout

Simple Advanced

Search for products, suppliers, forms, part number, etc.

2 Items

Office Solutions, Inc. • 2 Items • 180.49 USD

SUPPLIER DETAILS

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 Chair mat sit / stand 36x53	ESR184612	EA	121.65	<input type="text" value="1"/> EA	121.65
ITEM DETAILS				C	
Commodity Code	52101511				
2 Clear Cold Cup Lids, Fits 9-24 oz Cups, 1,000/ Carton 100% compostable in two to four months in a commercial...	WORCPLCS12	1000/CT	58.84	<input type="text" value="1"/> CT	58.84
ITEM DETAILS				E D	
Commodity Code	52151504				

- Remove
- Add to Favorites
- Move to Another Cart >
- Add to Draft Cart >

Details

For
Shauna Niswonger

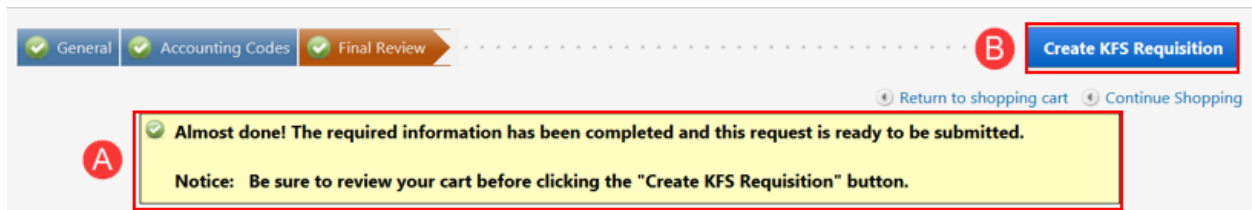
Name
2021-11-11 SNISWONG 01

Estimate (180.49 USD)

Total: 180.49

Create a KFS Requisition

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




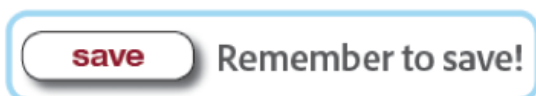
Note: If the UCIBuy cart contained items from multiple suppliers, a separate Rapid Requisition is generated for each supplier. The system displays or “lands” on one Requisition, and additional Requisitions are saved in the user’s Action List.

Review Document Header




- 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

- 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.
- Year** defaults to the current fiscal year.
- Chart/Org** defaults to the initiator’s home Organization (department) code.
- 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

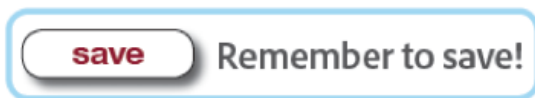
- The **Vendor** tab auto-populates with information from UCIBuy. These fields do not require editing.

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.





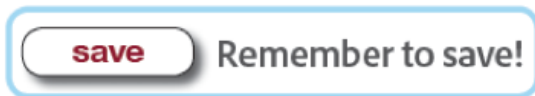
Review Additional Institutional Info Tab

- 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)

- 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.
- 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.
- Select  to complete the file upload.



Calculate and Submit the Rapid Requisition

- After all the information is entered, scroll to the end of the Rapid Requisition and select **calculate**.
- Next, scroll down and select **submit**.
- 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.