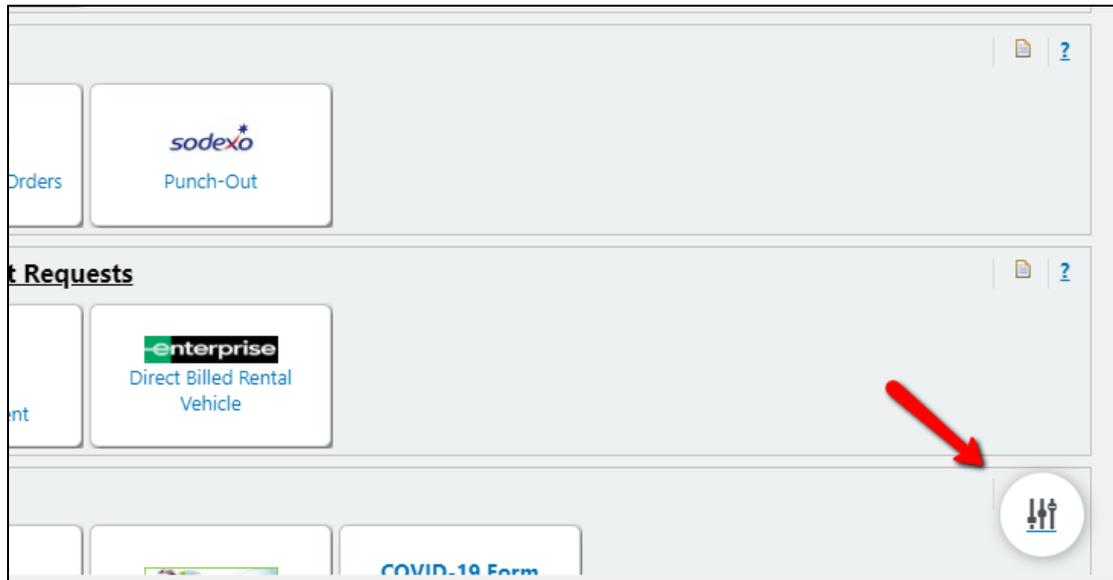


# eBucs Upgrade: What's Changing

## Summary of changes

- Homepage, Forms, PunchOuts
  - Very few to no changes
  - Same layout, slightly different aesthetic
  - Layout/Functions of the Forms and PunchOuts have not changed
  
- Shopping Cart
  - Empty Cart location
  - Create New Cart location
  - Cart Name location
  - “Open Form” symbol
  
- Draft Requisition
  - Edit button now indicated by pencil icon
  - Layout of the draft requisition has not changed
  
- Requisition
  - Available Actions drop-down menu location (withdraw requisition, copy to new cart, add a comment, etc.)
  - Approvals workflow location
  - Layout of the requisition information has not changed
  
- Approving a Requisition
  - Available Actions drop-down menu location (approve, reject, return, etc.)
  - Folder containing your pending approvals has not changed
  
- Comments
  - New symbols for adding, posting and replying to comments on requisitions and purchase orders
  
- Purchase Order
  - Invoices location
  - Invoice payment status location
  - Available Actions drop-down menu location (create quantity receipt, create cost receipt, etc.)
  - Layout of the PO information has not changed

## Switch between versions:



- To toggle between **Classic** and **New Shopping Experience** versions of eBucs, click the bubble located in the bottom left corner of the screen.

## eBucs Homepage/Forms & PunchOuts:

- Other than aesthetic, the eBucs homepage will remain relatively unchanged.
- Forms and PunchOuts will remain where they are currently located.
- Layouts/functions of the Forms and PunchOuts will remain the same.
- The vertical menu on the left side of the screen & the functions in the top right corner will also remain the same.

## Shopping Cart:

The screenshot shows a shopping cart interface. At the top left, there is a dropdown menu labeled "Shopping Cart" with a red arrow pointing to it. Below the dropdown, there are links for "Empty Cart" and "Create New Cart", with a red box around them and a red arrow pointing to the text "A: Empty/Create Cart & Cart Name". To the right of the dropdown, there is a text field "CHANGE CART NAME" with a red arrow pointing to it. Below the dropdown, there is a search bar with a magnifying glass icon. On the right side, there is a summary box labeled "Estimate (USD)" showing a total of 60.98 and buttons for "PROCEED TO CHECKOUT" and "ASSIGN CART". The main area shows two items. The first item is "Ink pens" with a price of 4.99. The second item is "Stapler" with a price of 55.99. A blue box around the "Stapler" item and a blue arrow pointing to it is labeled "B: Open form to make corrections (ex: wrong price)". A green box around the "ACTIONS FOR 1 SELECTED ITEMS" dropdown menu is labeled "C: Actions for Selected Items". A green arrow points to the dropdown menu, and another green arrow points to the "Stapler" item's dropdown menu.

### A)

- The **Empty Cart** and **Create New Cart** functions are now located under a drop-down menu labeled **Shopping Cart**.
- You can change the name of your cart on the line to the right of this drop-down menu.

**B)** If you see mistakes in your pricing, quantity, product description, etc. you can open the form by clicking the square next to each respective line item. The form will appear for you to make corrections.

**C)** Removing or moving an item from the cart is the same as before. Select the item by clicking the checkbox out from it and use the **Actions for Selected Items** drop-down menu to carry out the function.

## Draft Requisition – Inputting information:

**Requisition** ▾ : **131129133**

Summary | Taxes/S&H | Comments | History

**General** | **Shipping** | **Billing**

Cart Name  
CHANGE CART NAME

Description  
no value

Priority  
Normal

Ship To  
Contact Name Tyler Gray/Procurement  
Phone 423/439-6104  
Email graytl@etsu.edu  
ETSU Central Receiving  
325 Treasure Ln  
Johnson City, TN 37614  
United States

Bill To  
ETSU Accounts Payable  
PO Box 70729  
Johnson City, TN 37614  
United States

Billing Options

**Draft**

**Correct these issues.**  
They will prevent you from submitting your request.

Required: Index  
Required: Account  
Required: Commodity Code (Line 1)  
Required: Commodity Code (Line 2)

- The box on the right side of the screen of the draft requisition will tell you what additional information you need to input to place the order.
- To see a list of what information is needed, click the down-arrow out from **Correct these issues**.

**Requisition** ▾ : **131129133**

Summary | History

**General** | **Shipping** | **Billing**

Cart Name CHANGE CART NAME

Description no value

Priority Normal

Prepared by Tyler Gray

Prepared for Tyler Gray

Ship To  
Contact Name Tyler Gray/Procurement  
Phone 423/439-6104  
Email graytl@etsu.edu  
ETSU Central Receiving  
325 Treasure Ln  
Johnson City, TN 37614  
United States

Bill To  
ETSU Accounts Payable  
PO Box 70729  
Johnson City, TN 37614  
United States

Billing Options  
Accounting date no value

Delivery Options

Expedite No

Ship Via Best Carrier-Best Way

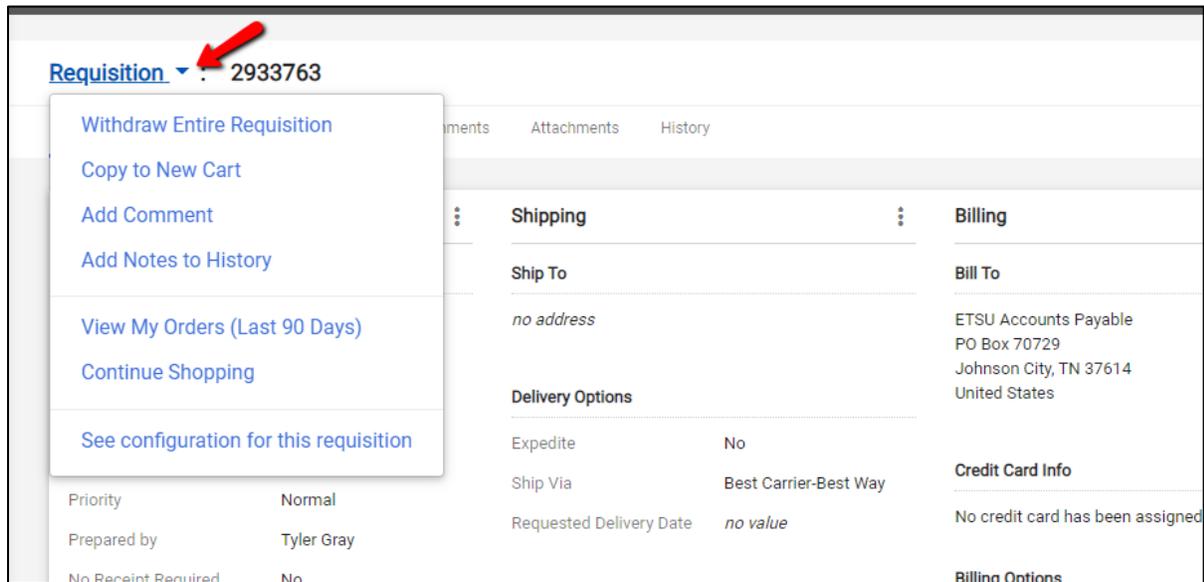
Requested Delivery Date

**Accounting Codes**

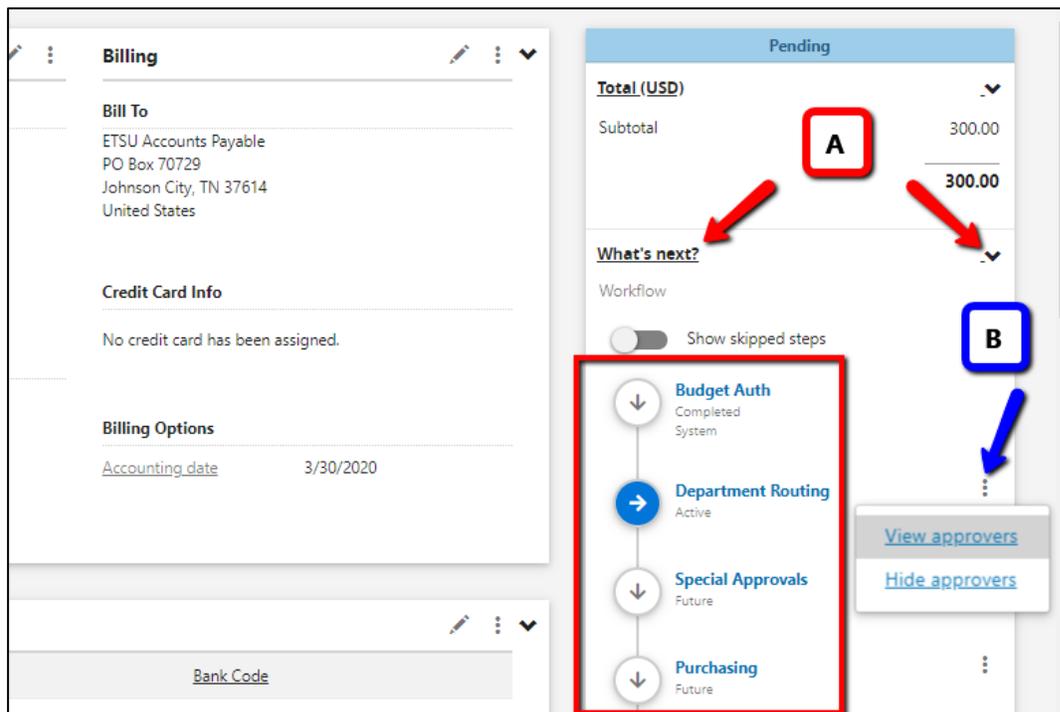
Chart	Index	Account	Bank Code
E ETSU	no value Required	no value Required	01 ETSU

- The edit button is now indicated by a pencil icon. Click the pencil in the respective section to change/input information in that section.
- To input the Commodity Code, select the checkbox for the item(s) and use the **Actions for Selected Items** drop-down menu just as before. Note: most forms default the commodity code in for you. If it does not ask you for one, a commodity code was defaulted in for you.

## Requisition – Available Actions & Approvals Workflow:



- **“Available Actions”:** **Withdraw Entire Requisition & Copy to New Cart** functions are now located from a drop-down menu under **Requisition** on the top left of the document next to the requisition number. Click the down-arrow to access the functions. You can also add a comment form here in addition to the Comments tab (see section on Comments for more information).



- To view the **Approvals Workflow**, click the down-arrow out from **What's next?** located in the box on the right of the document. The workflow will show vertically from the top beginning with Budget Auth.
- Click the **3 dots** out form each step and **View Approvers** to view who the approvers are at that step.

## Approving a Requisition – Assign to Myself, Approve/Complete, Reject Requisition:

- As of now, the folder containing your pending approvals will remain in the same location and have the same layout.

**Requisition** 127692757

- [Approve/Complete Step](#)
- [Return to Shared Folder](#)
- [Place on Hold](#)
- [Return to Requisitioner](#)
- [Forward to ...](#)
- [Copy to New Cart](#)
- [Add Comment](#)
- [Add Notes to History](#)
- [Reject Requisition](#)

**Shipping**

**Ship To**  
Contact Name Surgery / Penny Wright  
Phone 423/439-6263  
Email wrightpe@etsu.edu  
ETSU Central Receiving  
325 Treasure Ln  
Johnson City, TN 37614  
United States

**Delivery Options**

<u>Expedite</u>	No
<u>Ship Via</u>	Best Carrier-Best Way
<u>Requested Delivery Date</u>	no value

**Billing**

**Bill To**  
ETSU Accounts Payable  
PO Box 70729  
Johnson City, TN 37614  
United States

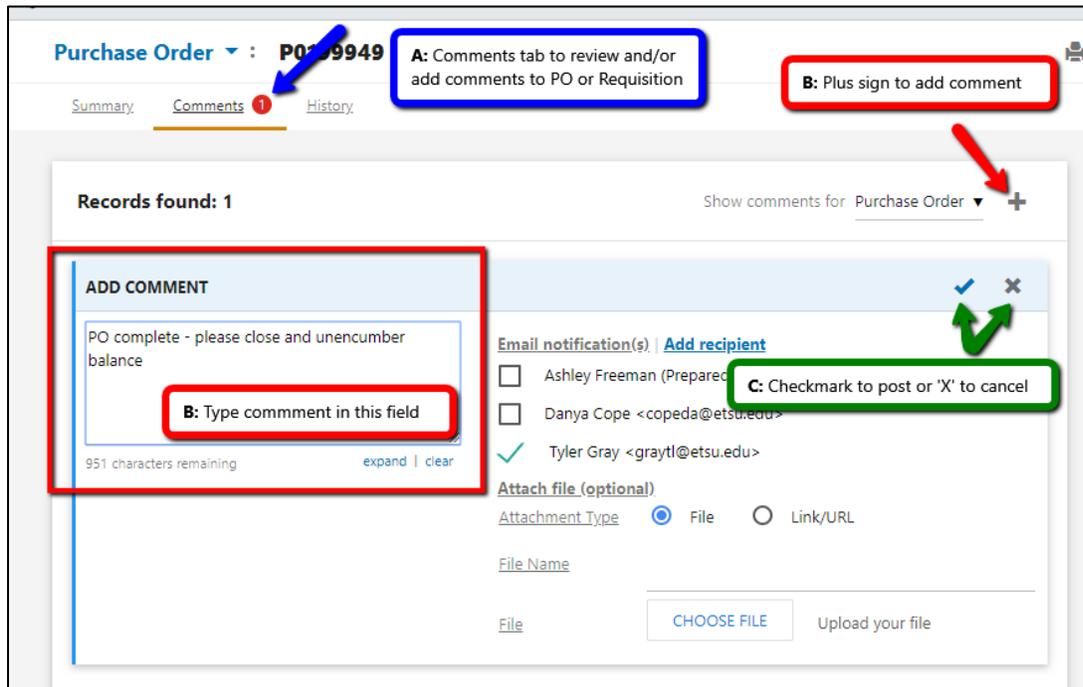
**Credit Card Info**  
No credit card has been assigned.

**Billing Options**

<u>Accounting date</u>	3/16/2020
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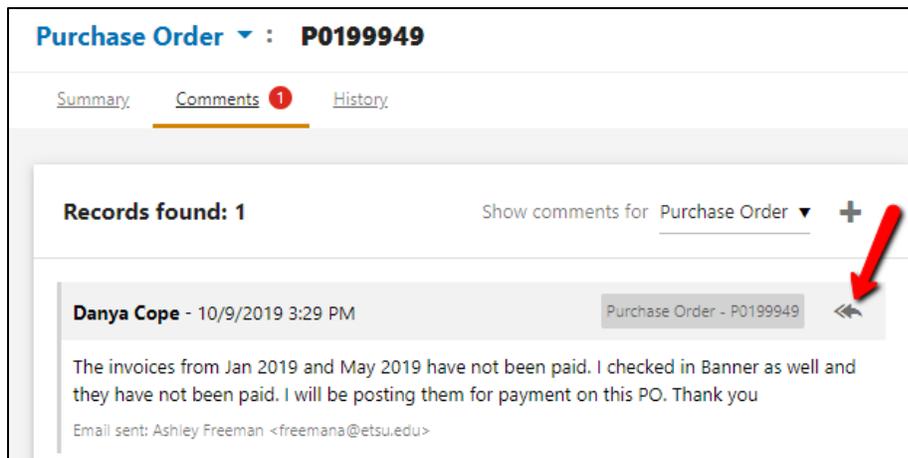
- **“Available Actions”**: **Assign to Myself, Approve/Complete Step, Reject Requisition, Return to Requisitioner**, etc. functions are now located from a drop-down menu under **Requisition** on the top left of the document next to the requisition number. Click the down-arrow to access the functions.

## Adding a comment to a Requisition or Purchase Order from Comments tab:



- A) To review and/or add comments, click the **Comments** tab at the top of the document below the requisition or PO number. If there are existing comments, a red badge will indicate how many comments are already on the document.
- B) To add a comment, click the **Plus** symbol and a comment field will appear for you to type your message.
- C) To post your comment, click the **Checkmark** symbol or click the **X** symbol to cancel.

Note: Comments in the upgraded version will still allow you to **add recipients**. Recipient's name must be **added** and **checked** for them to receive a notification of the comment as before. You can also still add attachments to your comment by clicking **Choose File**.



- You can also reply to an existing comment by clicking the **Reply To arrow** on the top right of the comment.

## Purchase Order – Invoices:

The screenshot shows a purchase order interface. On the left, under 'Billing/Payment', there is a 'Bill To' section with the following details: 'man/Human', 'ETSU Accounts Payable', 'PO Box 70729', 'Johnson City, TN 37614', and 'United States'. Below this is a 'Billing Options' section with 'Accounting\_date' set to '8/16/2019' and 'Payment Terms' set to 'F.O.B. Destination'. On the right, under 'Completed', there is a 'Total (USD)' summary showing a 'Subtotal' of '197.76' and a total of '197.76'. Below this is a 'Related Documents' section with a dropdown arrow. A red box highlights a list of documents: 'Requisitions: 122046518', 'Invoices: 82623246', 'Invoices: 82623503', 'Invoices: 83759569', 'Invoices: 84672266', 'Invoices: 84673661', 'Invoices: 84673436', 'Invoices: 87627128', and 'Invoices: 87727554'. A red arrow points to the dropdown arrow next to the 'Related Documents' header.

- Invoices are now located under **Related Documents** in the box on the right side of the purchase order.
- Click the down-arrow to show a list of the invoices and the requisition associated with the purchase order.

	12	--	11		taxable	
	197.76 USD	181.28 USD	197.76 USD	Shipping	0.00 USD	0.00 USD
				Handling	0.00 USD	0.00 USD
ments						
Credits: 0 / Receipts: 10 <a href="#">show list</a>						
				<b>Subtotal:</b> [?]	<b>32.96</b>	
				Discount:	0.00	
				Tax1 - DO NOT USE:	0.00	
				[?]		
				Tax2 - DO NOT USE:	0.00	
				[?]		
				Shipping: [?]	0.00	
				Handling: [?]	0.00	
				<b>Total:</b> [?]	<b>32.96 USD</b>	
<a href="#">See configuration for this buyer invoice.</a>						

- You can click each invoice and it will take you to a new page. Scroll down and the amount of the invoice will be listed in the bottom right corner of the document.

## Invoices – check payment status:

**EAST TENNESSEE STATE UNIVERSITY**

Accounts Payable > Invoices > Search For Invoices > Summary - Supplier Invoice No. 8127816218 (Doc. No. 82623246)

Invoice Number <sup>?</sup> **82623246** Supplier Account No.  
Supplier Invoice No. <sup>?</sup> **8127816218**  
Supplier Name <sup>?</sup> **Shred It USA LLC**

**Buyer Invoice** Approvals Matching Comments Supplier Messages Attachments History

**Summary** Discount, Tax, Shipping & Handling Codes

General		Address
Invoice Type:	Invoice	<b>Remit To</b>
Pay Status:	Paid	28883 Network Pl Chicago, IL 60673-1288
Invoice Number:	82623246	Address Id AP Accounts Payable 3
Supplier Invoice No.:	8127816218	
Supplier Name:	Shred It USA LLC <a href="#">More Shred It USA LLC info</a>	

- To check the payment status of an invoice, click into the invoice you want to check under **Related Documents** of the purchase order and the payment status will be located in the **General** section of the invoice document.

## Purchase Order – Creating Receipts:

**EAST TENNESSEE STATE UNIVERSITY** Tyler G

**Purchase Order** P0212838

- Add Comment
- Add Notes to History
- Cancel PO
- Finalize Revision
- Create Quantity Receipt
- Create Cost Receipt
- Print Fax Version
- Close PO
- Resend to Supplier

Shipping Information	Billing/Payment
<b>Ship To</b> Contact Name Yakubenko/Biomedical Sciences/Bldg#119/Rm#132 YAKUBENKO Phone 423/439-2411 Email toler@etsu.edu ETSU Central Receiving 325 Treasure Ln Johnson City, TN 37614 United States	<b>Bill To</b> ETSU Accounts Payable PO Box 70729 Johnson City, TN 37614 United States  <u>BillTo Address Code</u> Billto

Address Vacuum Products ShipTo Address Code CR **Billing Options**

- **“Available Actions”**: **Create Quantity Receipt** & **Create Cost Receipt** functions are now located from a drop-down menu under **Purchase Order** on the top left of the document next to the PO number. Click the down-arrow to access the functions. You can also add a comment form here in addition to the Comments tab (see section on Comments for more information).