

1) Getting Started

ACCESS eSHOP

- Log in to Firefly (<http://firefly.nebraska.edu>)
- Click the **eSHOP tab**
- Click the **GO** button to launch eSHOP outside of Firefly

2) Setting Up Your Profile

ADD VALUES TO YOUR PROFILE AND SET DEFAULTS

- Click the **View My Profile** link on the dropdown menu next to your name on the navigation bar
- Under the **User Information and Settings** menu, designate values for your profile and set the following defaults:
 - **Unloading Point** (Custom Fields > Header tab)
 - **Cost Objects** (Custom Fields > Codes tab)
 - **Shipping and Bill To Addresses** (Addresses tab)
 - **Cart Assignees** (Cart Assignees tab)
- Review the Training Snippet on *Updating Your Profile* for more information

3) Shopping – Creating a Cart

HOSTED SUPPLIER CATALOGS

- From **home/shop** page
- Using the **Shop** bar at the top, enter search term, then click **Go**
- For more search options click on the **Advanced Search**
- Change the quantity (if necessary) and click the **Add to Cart** button beside the desired item
- Follow *Submitting an Active Cart* instructions below

-OR-

PUNCH-OUT CATALOGS

- From **home/shop** page
- In the **Punch-out** area, click the supplier's icon to open supplier's punch-out site
- Search in supplier's site for items and add to supplier's shopping cart
- Follow supplier's site instructions for returning the item(s) to your active cart in eSHOP
- Follow *Submitting an Active Cart* instructions below

-OR-

NON-CATALOG ORDER FORM

- From **home/shop** page
- In the **Showcased Special Forms** section click on the **Non-Catalog Order form**
- Read the form's General Information and complete form
- Select **Add and Go to Cart** to enter one item
- Select **Add to Cart** to continue adding items using the same form
- Click **Go**
- Follow *Submitting an Active Cart* instructions below

4) Modifying an Active Cart

REMOVE ITEMS FROM CART

- Open **Active Cart**
- Click **check box** to the right of the price
- Select **Remove Selected Items** from **Perform an action on...** drop down menu

CHANGE PRODUCT QUANTITY

- For Hosted Catalog items already added to cart
 - Modify number in **Quantity** field
 - Click **Update**
- For Punch-out Catalog items
 - If possible, click **MODIFY ITEMS** to be returned to the punch-out supplier's site. Modify quantity and follow supplier's directions to checkout and return to eSHOP

- If there is no **MODIFY ITEMS** link, you will need to delete the item from the cart and add the item to the cart again from the punch-out vendor's site

5) Adding Funding Information to an Active Cart

ASSIGN ACCOUNTING CODES

- Click **Proceed to Checkout**
- Click **Accounting Codes** tab
- Click **Edit** at the top to assign funding information to all lines **OR**
- Click **Edit** at the line to assign funding information to a line
- Cost Object - Click **Select profile values** to choose pre-defined values or **Select from all values** to search for a value
- Click **recalculate**
- GL Account – Click **Select profile values** to choose pre-defined values or **Select from all values** to search for a value
- Click **Recalculate and Save**

SPLIT ACCOUNTING CODES

- Click on **Accounting Codes** tab
- Click **Edit** at the top to split fund the entire Requisition **OR**
- Click **Edit** at the line to split fund a specific line (this will override the Header values)
- Click **Add split**
- Select **% of Price, % of Qty** or **Amount of Price**
- Click **Select profile values** to choose pre-defined values or **Select from all values** to search for a value
- Enter correct % or amount beneath the price/quantity drop down menu for each Cost Object
- Click **Recalculate and Save**

ADD INTERNAL NOTES AND/OR ATTACHMENTS (TO PURCHASING)

- Click **Proceed to Checkout**
- In the **Internal Notes and Attachments** area, click **Edit** button
- Add a note
- Click **Save**
- Click **add attachment**
- Browse to find attachment
- Choose attachment
- Click **Save**

ADD EXTERNAL NOTES AND/OR ATTACHMENTS (TO SUPPLIERS)

- Click **Proceed to Checkout**
- In the **External Notes and Attachments** area, click **Edit** button
- Add a note
- If **multiple delivery dates** are needed, a note can be entered at the line level or in the header for the vendor.
- Click **Save**
- Click add attachment
- Browse and choose attachment
- Click **Save**

6) Assigning an Active Cart (Shopper)


- Once items have been added to cart
- Click **Assign Cart**
- Leave the default assignee you previously designated **-OR-**
- Click **Select from profile values** or **Search for an assignee**
- (Optional) Enter a note to the Assignee
- Click **Assign**

7) Submitting an Active Cart (Requestor)

- Review/modify cart contents and required information (Accounting Codes, Shipping information, etc.)
- Click **Submit Requisition**


8) Tracking a Requisition

FIND A REQUISITION


- Hover over the **Shop icon** on the navigation bar (on the left) 
- Click on **My Carts and Orders** link
- Click on **View My Orders (Last 90 Days)**
- Use the filters on the left to change date range or narrow the results
- Click the **Requisition Number** link
- View the summary, detail, approval status or history and add notes or comments if needed

9) Withdrawing a Pending Requisition

WITHDRAW ENTIRE REQUISITION


- Hover over the **Shop icon** on the navigation bar (on the left) 
- Click on **My Carts and Orders** link
- Click on **View My Orders (Last 90 Days)**
- Click the **Requisition Number** link
- In **Available Actions** drop-down menu, select **Withdraw Entire Requisition**
- Click **Go**
- In message box type your reason
- Click **Withdraw Entire Requisition**

WITHDRAW A LINE

- Hover over the **Shop icon** on the navigation bar (on the left) 
- Click on **My Carts and Orders** link
- Click on **View My Orders (Last 90 Days)**
- Click the **Requisition Number** link
- Check the appropriate checkbox to the right of the price
- In **For selected line items** drop-down menu, select **Withdraw Selected Items**
- Click **Go**
- In message box type your reason
- Click **Withdraw Line items**

10) Creating a Goods Receipt (UNK, UNL & UNO only)

CREATING A QUANTITY RECEIPT

- Hover over the Orders & Documents icon on the navigation bar (on the left) 
- Click the **Search Documents** link
- Choose **Purchase Orders** from drop-down **Search** menu
- Enter the PO number and click **Go**
- From **Available Actions** drop-down menu, choose **Create Quantity Receipt** and click **Go**
- Review all line level data for quantity and cost accuracy
- Select **Complete**

CREATING A PARTIAL RECEIPT

- Click the **document search** tab
- Choose **Purchase Orders** from drop-down **Search** menu
- Enter the PO number and click **Go**
- From **Available Actions** drop-down menu, choose **Create Quantity Receipt** and click **Go**
- Review and modify pre-populated quantity or amount
- If line item has not been received, click **Remove Line**
- Review all line level data for quantity and cost accuracy
- Select **Complete**

CREATING A RECEIPT WITH RETURN/CANCELLED

- Click the **document search** tab
- Choose **Purchase Orders** from drop-down **Search** menu
- Enter the PO number and click **Go**

- From **Available Actions** drop-down menu, choose **Create Quantity Receipt** and click **Go**
- For one of the lines that was previously received, enter a quantity and change **Line Status** to **Returned** or **Cancelled**
- Select **Complete**

11) Modifying a Purchase Order

CANCEL A PO OR PO LINE

NOTE: It is the department's responsibility to contact the supplier to notify them about the change.

- From **home/shop** tab, click **Change Order Request** form
- Read form's **General Information**
- Enter required fields
- Choose **Cancel Purchase Order** from **Explanation of Change(s) Requested** area
- Add **Explanation of Change**
- Select **Add and go to Cart**
- Click **Go**
- See instructions for *Submitting an Active Cart*
- **NOTE:** Submitting this form requires that you enter funding information, however, it will not stop for funding approval
- **NOTE:** This form must be submitted in its own eSHOP cart.

INCREASE QUANTITY OR PRICE ON PO

- Follow instructions above for cancelling a PO and create a new PO to increase the total purchased value

12) Approve/Reject a Pending Requisition

APPROVE via EMAIL

- Open Approval Email and review Requisition details
- Click **Take Action**
- Select an Action
- Click **Submit**

APPROVE IN eSHOP

- From **home/shop** page click **Action Items** and select either **Unassigned Approvals** or **My Assigned Approvals** (if you have previously assigned it to yourself)
- Click the **Requisition Number** link
- Review the items, ship-to address, Cost Objects, notes, etc.
- Select **Approve/Complete Step** in the **Available Actions** drop-down menu
- Click **Go**

RETURN A REQUISITION

- From **home/shop** page click **Action Item** and select **Unassigned Approvals**
- Click on the **Requisition Number** link
- From **Available Actions** select **Assign to Myself** and click **Go**
- From **Available Actions** select **Return to Requisitioner** and click **Go**

REJECT A REQUISITION

- From **home/shop** page click **Action Item** and select **Unassigned Approvals**
- Click on the **Requisition Number** link
- From **Available Actions** select **Assign to Myself** and click **Go**
- From **Available Actions** select **Reject Requisition** and click **Go**

REJECT A LINE

- From **home/shop** page click **Action Item** and select **Unassigned Approvals**
- Click on the **Requisition Number** link
- From **Available Actions** select **Assign to Myself** and click **Go**
- Click the box beside the price for the item
- From **For selected line items** choose **Reject Selected Items** and click **Go**