TechBuy 11.2 Upgrades Summary

TechBuy will be unavailable from 9 pm on Friday, July 22, 2011 until 3 pm on Sunday, July 24, 2011 in order for the upgrades to be loaded into the system.

The upgrades will be live on August 1, 2011.

1. **Setting FOAP favorites in your profile.** The system will now allow you to set a full FOAP up in your favorites.
   - Click on your Profile>Purchasing>Custom Fields>Code Favorites
   - Click on the “add” button

To set up the FOAP, click “add”:

- Then when creating the requisition, click on the “Line and Header FOAP Summary” tab and click edit either on the header or line levels to edit the full FOAP.
2. **Reviewing the Comments and History for an order is a common way to track status and view an audit trail of events.** Previously, Comments and History could only be viewed for one document at a time. For example, while viewing a PO, you were required to open the associated requisition to see the requisition history for the purchase. With the new feature, users can select to view all comments or history to see all of the associated information for all document types (requisition, purchase order, invoice). This provides the ability to see all related comments on a single comments tab and saves valuable time toggling to different screens:
   - Open the particular requisition or purchase order for which you would like to view the history.
   - Click on the comments tab.
   - The drop down will let you see: all, requisition, purchase order, invoice, and receipt (the receipt comments do not allow you to copy anyone, as there is not any workflow allowed on receipts).

3. **Support staff can view draft carts of other users** - This feature allows support staff to view draft carts created by other system users. When viewing another draft cart, you are presented with a read-only view of the cart and its contents. For example, a user may email TechBuy support, and the support staff can see the user’s screen. When viewing the draft cart the support staff will be looking...
at a read-only view of the user’s cart and can assist the user with any questions they may have about completing their cart.

4. Additional functionality of the “Prepared For” field.
   - Often, a shopper or requisitioner is responsible for creating orders in TechBuy for other members of their team or department. In this scenario, the user who creates the cart for another user is considered the “Prepared By” user and the user with the original request is the “Prepared For” user. With the new feature, the “Prepared By” user will be able to see the purchase order(s) generated for the “Prepared For” user. This new feature allows the “Prepared By” user to maintain visibility into a purchase order (not a requisition) after they have created it.
   - As the “Prepared By” user, you will be able to access “Prepared For” orders from both PO History and through “My Submitted Orders” (History tab>PO History, click on the filter>Adjust the date range>click on “My Submitted Orders”).

5. Additional functionality of the Prepared For field.
   - The “Prepared By” user can enter items for purchase for another system user and it will auto-populate the “Prepared For” user’s ship to and FOAP. So, if the “Prepared For” person has a default ship to, it will automatically change this to their ship-to. The same is true if they have default FOAPs stored in their profile. You will still be able to modify ship-to and FOAPs as needed. The goal of these improvements is to provide a quicker and more convenient process for users who frequently purchase on behalf of another user.

   - The following occurs upon selecting a different user in the “Prepared For” field:
     • The custom field values default to the default values of the selected “Prepared For” user.
     • The ship-to and bill-to addresses default to the addresses of the selected “Prepared For” user including contact name, email, and phone.
     • The default FOAP of the “Prepared For” user is merged with the list of the shopper or requisitioner of the order (“Prepared By” user). The shopper or requisitioner is able to choose from either his/her own list or the “Prepared For” user’s list.
6. A new set of e-mail preferences has been created for “Prepared By” users. The new e-mails will allow users to receive e-mail notifications about the requisitions and purchase orders that they created for other users. For users who prepare carts for others and also place orders for themselves, this feature allows the user to receive different emails depending on the order originator. In order to get these notifications, each user will need to access their profile and check any of the following email options on in order to get emails notifying them of the status of a “Prepared For” requisition:

a) All new email preferences related to this feature begin with “Prepared By” so that they are easy to identify. The new email notifications include (PR refers to a requisition):

   • Prepared By – PO Distribution Failure Notice
   • Prepared By – Cart Assigned Notice
   • Prepared By – PR rejected/returned
   • Prepared By – PR line item(s) rejected
   • Prepared By – PO Workflow complete
   • Prepared By – PO sent to supplier
   • Prepared By – PO line item(s) rejected
   • Prepared By – PO rejected
   • Prepared By – PO Requires Receipt Notice
   • Prepared By – Invoice Requires Receipt Notice
   • Prepared By – PR has lines that have been sent to bid
   • Prepared By – Awarded PR is created

7. Direct approvals of requisition steps from an email. New functionality is being added that allows an approver to take action on a requisition or purchase order directly from an email notification link. This will allow approvers more flexibility in approving most orders quickly, without having to log into the application. The email will contain basic order information as well as line level information, to allow the approver to make a decision on what action to take on the entire document. **The approver must have access to the internet, but is not required to be logged into TechBuy** to take action on the order. With this functionality enabled, a requisitioner, approver, or financial manager will be able to approve, reject, assign a requisition to themselves for later review and action, or to be returned to the preparer. Each email received will contain a link that launches a simple webpage where the specific action may be selected. A Comments section is also available allowing an approver to log comments in History for the action being taken. Users will also enter a personal identification number that authenticates them as the authorized approver.
NOTE: Approver Email Notifications. In order for the user to receive the emails, the user must have the **PR pending Workflow approval** email notification enabled. To enable this, access your profile>user settings>email preferences, then check “PR pending workflow approval” and save.

**User Setup REQUIRED:** Users will not be able to approve from email until the approver has configured an approval code in their profile. To set up the approval PIN number, go to profile>User Identification in Email Approval Code. The user’s code must contain four characters and may be any combination of letters, numbers, and characters.
Note: the approval email will in an enhanced format (even if you are not set up for email approvals).

In summary, to set up email approvals:
1. Set your email notification (PR Pending Workflow Approval)
2. Set your PIN number in your Profile.

If the approval code is NOT setup in your profile, you will not be able to approve via emails.

Users may manage their preferred email format by overwriting the organization’s default under profile>Personal Setting. The user may choose between HTML or Plain Text.
8. Receiving Enhancements

A new feature has been added, that will allow the Payment Services Department support to reopen a receipt (which will allow the end user to make edits) or delete the receipt. When opening a receipt, the user will be forced to enter a comment on the receipt as to why they are reopening the receipt. That comment gets recorded in the receipt history and will be viewable to the Payment Services team. After entering a comment to indicate why you are reopening the receipt, the receipt will be in draft mode again. With the receipt being in draft mode, the user is allowed to make edits or delete the receipt completely. Some receipts are not eligible to be reopened. If a receipt has an invoice created against it (e-invoicing), the receipt is NOT permitted to be reopened. Additionally, any receipts created PRIOR to July 24, 2011, cannot be reopened.

Departments can email accounts.payable@ttu.edu to have a receipt reopened or deleted.

For assistance or questions with any updates, please email techbuy.purchasing@ttu.edu.