TechBuy Phase II Training

Administration and Finance Information Systems Management

(AFISM)
Introduction to SciQuest (TechBuy)

SciQuest Higher Markets, a shopping mechanism, has been purchased and will be used jointly by Texas Tech University System, Texas Tech University and Texas Tech University Health Sciences Center. The shopping mechanism has been named **TechBuy** and will be introduced in two phases due to the implementation of Banner.

TechBuy will allow end-users to shop via hosted catalogs and punch-out vendors (i.e. Staples, Fisher, etc.) and will allow for one shopping cart to create a requisition and breakout to multiple purchase orders. The hosted catalogs will provide online comparison shopping. Forms or Non-Catalog orders will be used for purchases not available via hosted catalogs and punch-out vendors.

**TechBuy Phases:**

**Phase I - FY08 Orders**

- End users may use the punch-out and catalog vendors available in TechBuy and continue to use eRQ and ePO for the remainder of FY08.
- FY08 orders in TechBuy will not encumber funds or have budget checking since they will not be integrated with TechFim.
- Orders placed through TechBuy will capture the TechFim account string and will be charged by an IV (similar to the pcard process).

**Phase II- FY09 Orders Entered Prior to 9/1/2008**

- Phase II is scheduled for implementation June, 2008 for FY09 requisitions/purchase orders that require entry prior to 9/1/2008.
- Phase II purchases will feed to Banner for all FY09 orders using the Banner FOAP (fund, organization, account and program). Crosswalks will be developed for translations from TechFIM to Banner FOAP.
September 1, 2008

- The eRQ and ePO systems currently used will be discontinued as of September 1, 2008
- TechBuy will be used exclusively for all hosted catalogs, punch-out and non-catalog/form orders

**TechBuy Definitions:**

- **Cart** - A virtual shopping cart which holds various items a user has selected for purchase. Carts are capable of holding items from multiple vendors.
- **Requisition** - A requisition is a request to order, also known as Purchase Requisitions (PRs) in TechBuy. Requisition orders are not final until they have gone through the entire approval process.
- **Purchase Order** – when a requisition is submitted to a vendor it is a purchase order. This is a finalized requisition.
- **Hosted Catalog** – Catalogs in TechBuy are virtual catalogs created by each vendor that is hosted on the TechBuy site. Catalogs will be updated periodically based on the contract with the vendor.
- **Non-Catalog/Forms** – Orders not available through hosted catalogs or punch-out vendors are Non-Catalog orders. Non-Catalog orders will not be used during Phase I. (i.e. Orders for t-shirts at a local store, professional services, construction services, independent contractor payments). **Phase II will use the Non-Catalog/Forms exclusively for FY09 orders.**
- **Punch-out** – A vendor website in which a user actually leaves TechBuy to shop on the vendor’s site. Each Punch-out site will have a different layout and will function differently. After shopping in the vendor’s punch-out site, the users cart will then be returned to the TechBuy site to finalize the transaction.
- **Ghost Card** – a credit card that the end user does not see. Most vendors in Phase I will have a ghost card tied to the account. The University then bills the department (via IV) the amount that is charged to the card for each requisition based on the account information the user enters in TechBuy. There is no surcharge for this.
- **Procurement Card** – a credit card that is issued to the end user by TTU. Procurement Cards (PCards) will be allowed for payment to some of the vendors in TechBuy.

**TechBuy Roles:**

- **Financial Manager** – A TTU or TTUS employee who is currently an account manager in TechFim. This role has unlimited account approval authority (up to the budgeted amount for that account). Financial Managers will be responsible for registering Approver, Requestor and Shopper roles for use of specific FOPs in TechBuy and removing their permission should there be a personnel change. Financial Managers will also be responsible for complying with University budgets and spending funds for the purpose intended.

- **Approver** - A TTU or TTUS employee who has been given permission in TechBuy to shop and approve Purchase Requisitions for specific FOPs by the Financial Manager. This role has unlimited account approval authority (up to the budgeted amount for that account). Approvers will be responsible for complying with University budgets and spending funds for the purpose intended.

- **Requestor** - A TTU or TTUS employee who has been given permission in TechBuy to shop and approve Purchase Requisitions for specific FOPs by the Financial Manager. This role has account approval authority up to $5,000. Any transaction greater than $5,000 coming from an individual with this role will go to a higher authority (Approver or Financial Manager) for approval. Requestors will be responsible for complying with University budgets and spending funds for the purpose intended.

- **Shopper** – A TTU or TTUS employee who has been given permission in TechBuy to shop on specific FOPs by the Financial Manager. This role has no approval authority. Any transaction submitted from an individual with this role will go to a higher authority (Requestor up to $5,000, Approver or Financial Manager greater than $5000) for approval based on FOP.
**TechBuy Workflow**

The steps in workflow vary based on the item(s) ordered, order amount, funding, and institutional procedures.

Some Key facts about workflow:

- Line items can be rejected and approved independently
- Workflow for purchase order revisions or supplier resends will be processed through the change order form and will be manually entered in Banner.

**Approver/Financial Manager**

- All orders will route to an Approver based on the Banner Fund Organization Codes entered, with the exception of orders under $5000 entered by a Requestor

**Requestor**

- Orders from Shoppers under $5000 will route to a Requestor based on the Banner Fund Organization Codes entered

**SPAR**

- State SPAR Fund Ranges will route to SPAR regardless of dollar amount
- SPAR FOPs will route to SPAR for all orders over $500

**Environmental Health and Safety**

- Radioactive Purchases

**Information Technology**

- IT Purchase over $25,000

**Fleet Management**
- Vehicle Purchase

- **Sourcing PR Export – Bids exporting to TechBid**

- **Research Services**
  - Federal Equipment

- **Purchasing**
  - Line Item over $500
  - Purchase Requisition over $5,000
  - All State Funded Purchases
  - Banner Form Approval
    - Memberships
    - Animal Purchases
    - Bid/RFP Requisition
    - Change Order
    - Construction
  - New Vendor Set Up
  - Route to Buyer based on purchase category

Buyer 1  Unassigned  Buyer 7  Cathy Limon
Buyer 2  Kathy Fanning  Buyer 8  Jeanine Palmer
Buyer 3  Tonya Bolt  Buyer 9  Saundra Wilhite
Buyer 4  Kendra Jackson  Buyer 10  Kirk Meadows
Buyer 5  Roland Gonzales  Buyer 11  Janice Forburger
Buyer 6  Terrie Mora
TechBuy Registration

A Financial Manager will automatically be pre-registered in TechBuy based on account approvals provided by TechFim. The Financial Manager will need to register Approvers, Requestors and/or Shoppers in order for an individual to obtain access to TechBuy. Approvers, Requestors and Shoppers will only have access to the specific Banner Fund/Organizations that the Financial Manager assigns to the individual.

Instructions for TechBuy Registration:

- Log on to http://team.texastech.edu
- Provide your eRaider User Name and Password
- Choose Access Request from the list provided on the left side of the page
- Select Application: check the Financial Profile radio button; Click Next
- Enter the eRaider User ID for the user you are requesting permission for
  Note: if you do not know the eRaider ID, you may click the Search for eRaider ID radio button
- From the Financial Role screen, you will need to select a role based on the level of approvals you are granting the user
  - Approver – grants user the same authority as the Financial Manager
  - Requestor – grants user spending authority up to $5000 per requisition
  - Shopper – no spending authority; all requisitions will route for approval
- None – allows the Financial Manager to delete authorities from a user

- From the FOP Selection screen, using the arrow keys, move the Available FOPs to the Selected FOPs. You may also use this application to delete FOPs.
A Default Ship To Location is also required. There is a drop down menu with all of the available locations. Note: TTU/TTUS Ship To codes will begin with a “T” and are set up by buildings, not departments.

Click on Submit.

Registrations will be received and the user will be set up by the Purchasing and Contracting department. All Shoppers and Requestors are required to attend a training class prior to obtaining access to TechBuy. Training is not required for Approvers; however, it is highly recommended.
Welcome to TechBuy

Logon to the TechBuy test site:

https://usertest.sciquest.com/apps/Router/Login?OrgName=TexasTech&URL
TechBuy Home Page

The TechBuy Home Page allows you to access your Profile, Carts, Shopping, Approvals, History, etc.

TechBuy Profile Set Up

Click on profile in TechBuy to review and update personal user information ranging from assigned roles, approver information, email preferences, and more.

NOTE: The Save button must be selected on each screen for changes to be saved. Navigating to another screen without clicking the Save button will lose any changes made on the previous screen.

User Settings

- **User Identification** - You may modify any of the available information, First Name, Last Name, Phone Number, E-mail Address, Department and Position. Note: User Name cannot be modified.
- **Personal Settings** allow you to configure Language, Time Zone and Color Theme (permits a user to override the default Color Theme).
- **Roles**: Provides a read-only list of the role or roles assigned to the user.
- **Department Permissions**: Provides a read-only list of the departments that the user is allowed to view data via History (PR History, PO History, Receipt History, etc).
- **Email Preferences** – Check to enable instances that you would like to receive an email notification. Approvers can choose whether or not to receive email notification when an order requiring approval lands in their “queue.”

**Navigation Setup** – Allows you to customize the placement of tabs.

**Purchasing**

- **Custom Fields/ Codes**: allows you to add your Chart of Accounts and Banner FOAPs.
Once added, a drop down list will be available when you are processing your requisitions. NOTE: A default will need to be selected for each element.

Click on the Edit button next to Chart, Fund, Organization, Account and/or Program that you would like to populate:

Click on Edit Values, Check Values you wish to populate and Click on Add Values

Highlight the selected default value (one default must be selected) Check Default box and SAVE

- **Approval Limits** provides your approval limits within TechBuy
- **Payment Options** allows you to enter your pcard information
Addresses: Setting up Bill To and Ship To Addresses

Billing and Shipping information is **required** in TechBuy. The shipping address identifies where the supplier should ship the item(s). The billing address identifies where the supplier should send the invoice for the item(s).

Select the radio button adjacent to the address desired and click the default button. Additional addresses may be selected; however, you may only have one default address. This is also the location you would use to delete addresses.

Press the **Save** button to save changes. The selected address displays in the Shipping Addresses list box.

**Bill To Address tab:** Click the Select Addresses for Profile button.

Use the drop down box to **Select Address Template**. Only two selections are available, if using TTU funds, select **TTU Payables**.

Press the **Save** button to save changes. The selected address displays in the **Billing Addresses** list box.

- **Product Views** shows your available product views
- **Punch-out Access** source of payment to vendors and list of suppliers.

**Permissions**
- **Shopping Cart, Orders, Approvals, Accounts Payable, Administration, Custom Fields:** review of permissions available in each module

**History**
- Provides a history of user profile
How to Shop in TechBuy

Forms

Forms will be used when a punch-out supplier or a hosted catalog supplier are not available. From your Home page, Click the Forms Tab and open the TTU Forms folder. Forms will be added to your shopping cart to create Purchase Requisitions.

There are multiple selections in the TTU Forms folder. Click on a selected form to open.

**Federal Equipment Research Form:** Used for grant equipment purchases that requires Research Services Approval

**Animal Purchases:** For Animal purchases including livestock and lab animals

**Bid/RFP Requisition:** Used for purchases that will require bids or an RFP to be obtained by Purchasing and Contracting. The Bid/RFP threshold is $25,000 and Bids/RFP’s will be required unless the purchase is exempt, proprietary or a contract.
Please contact Purchasing & Contracting for more information.

**Change Order:**
Use for changes to existing Purchase Orders.

**Construction:**
For Construction encumbrance. Do not use this form for Professional Services

**Membership:**
For Membership Purchases

**Non-Catalog:**
If one of the forms on this page is not applicable to your purchase, use Non Catalog Form. This form will be used for the majority of your purchases.

**Non-Catalog with Informal Bid:**
Used when user needs to attach informal bid information. Informal bids are required for purchases of $5000 to $25,000. Informal bids must be obtained from at least two HUB Vendors.

**Registrations:**
Used for conference registrations

**Request to Create a Standing or Blanket Order:**
Used when a standing or blanket order or required
Completing Non-Catalog Form Information

**Select Supplier**  Note: the Select Supplier Information will apply to all Forms that allow you to choose a vendor

To select a vendor on one of the Forms:

Vendor Information – click on choose supplier… and use the drop down box to select HUB status after a vendor is selected
From Select Supplier screen, you have the following options:

From Supplier Selection Criteria, use the drop down box to select:

Choose From a List of Known Suppliers

Manually Enter Supplier Information

Or Select Search For Supplier

For Manual Entry (if vendor is not available in the Search For Supplier)

To Search For Supplier, enter search letter or word in search box:
Search Results will allow you to select a vendor

The selected vendor will populate in your Form

Check the Distribution Box to add additional vendor information

Select HUB Status

Choose a Purchase Category from the drop down menu

Quantity – Enter the quantity you wish to purchase

Packaging – ties to your unit of measure

NOTE: if you enter

Quantity 1

Packaging 12

Select Gallon

You will receive One Twelve Gallon item
Enter your Unit Price (ties to Quantity)

Enter a Prior Year Purchase Order Number

Enter Your Product Description

Note: Banner only allow 255 characters in this field

Add Internal or External Attachments

Check if Environmental Health and Safety item

Description of Goods or Services – use for additional product information
Note: Bold Items are Required Fields in all Forms

**Submitting Your Form to a Cart** (upper right hand corner of form)

Once you have completed a line item, you may choose the following actions:

- **Add and Go To Cart** (form is completed and you are ready to check-out)
- **Add to Cart and Return** (adds line item to a cart and returns you to form to enter additional line item)
- **Add to Cart** (adds line item to cart and allows you to continue shopping)
- **Add to Draft Cart** (places line item in a cart for later use)
Add to Favorites (adds form to “My Forms”)

After selecting an action, click Go

You may also Close a Form and return to the TechBuy Home Page by selecting the Close button

**Non-Catalog Form With Informal Bid**

Use this Form if you have received verbal bids for purchases

Select Category of Purchase

Enter Catalog Number if applicable

Add Internal Attachments if desired

Enter Date Goods or Services are Required
Complete the Informal Bid Section

Bid For Company A – Enter the information for the *Awarded* Vendor

<table>
<thead>
<tr>
<th>Informal Bid Form</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Vendor</strong></td>
</tr>
<tr>
<td>Contact Name: Company A</td>
</tr>
<tr>
<td>Telephone Number:</td>
</tr>
<tr>
<td><strong>Ship FOB Destination</strong>:</td>
</tr>
<tr>
<td><strong>HUB Status</strong>:</td>
</tr>
<tr>
<td><strong>Product Description</strong>:</td>
</tr>
<tr>
<td><strong>Packaging</strong>:</td>
</tr>
<tr>
<td><strong>Quantity</strong>: 1</td>
</tr>
<tr>
<td><strong>Price</strong>:</td>
</tr>
</tbody>
</table>

Complete requested information – Bold items are required fields.

**NOTE:** Packaging – ties to your unit of measure

*If you enter*

- **Quantity**: 1
- **Packaging**: 12
- **Select Gallon**

*You will receive One Twelve Gallon item*

<table>
<thead>
<tr>
<th>Non-Catalog Form</th>
<th>General Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Purchase Category</strong>: Agricultural Equip/Sup</td>
<td></td>
</tr>
<tr>
<td><strong>Quantity</strong>: 1</td>
<td></td>
</tr>
<tr>
<td><strong>Packaging</strong>: 12 GAL - Gallon</td>
<td></td>
</tr>
<tr>
<td><strong>Unit Price</strong>:</td>
<td></td>
</tr>
</tbody>
</table>
Complete Information for Company B and Company C

- Company Name B
- Contact Name Company B
- Telephone Number Company B
- Ship PO# Information
- HUB Status Company B
- Detailed description of goods or services Company B

- Quantity for Company B
- Price Per Unit for Company B
- No Bid provided by Company B
- No Response Company B

Submitting Your Form to a Cart (upper right hand corner of form)

Once you have completed a line item, you may choose the following actions:

- Add and Go To Cart (form is completed and you are ready to check-out)
Add to Cart and Return (adds line item to a cart and returns you to form to enter additional line item)

Add to Cart (adds line item to cart and allows you to continue shopping)

Add to Draft Cart (places line item in a cart for later use)

Add to Favorites (adds form to “My Forms”)

After selecting an action, click Go

You may also Close a Form and return to the TechBuy Home Page by selecting the Close button
Searching and Shopping in the TechBuy Catalogs

From Product Search

- Search for products from catalogs
  - By Supplier
  - By Category
  - By Catalog Number
  - Chemicals

➢ By Supplier
  - Click the link
  - Within the search results, you view the supplier name, type and preference.
  - Select legend to learn what the icons represent, or you can mouse over them and the screen tip will tell you.
  - Click on the supplier's name to get detail supplier information
  - Click on icon adjacent to supplier name and the search provides categories within this supplier.
    - You can drill down by clicking on the + to the left of the category
    - Click on view to see available products
  - To select a product
- enter the quantity in the box provided and click add to cart

- or click inside the select box and at the bottom of the page select Add To Active Cart
  - There are also other options available in the drop down box

- **By Category**
  - Click link [Browse by Category]
    - Click on the + to the left of the category you want to search by
    - You can view the category by clicking on view
      - You can click on the + and search by sub-category and then click view
  - To select a product
    - enter the quantity in the box provided and click add to cart
    - or click inside the select box and at the bottom of the page select Add To Active Cart
      - There are also other options available in the drop down box:
        - Add to favorites, Compare, Add to draft cart for comparison, adding to favorites and adding to a draft cart

- **By Chemical**
This is a structure search that is used to find available structures and the related hosted catalogs. It has the functionality for Structure Drawing

is a search that access Chemical ReSource. To use this search function ChemDraw Plugin is required

Using the Product Search Interface

This search will find products in hosted catalogs. Selecting the ALL category results in a search of all hosted categories simultaneously.

- Type keywords into the search field
  - Select checkbox that applies
  - Click search
- Click Advanced search options
  - Fill in applicable field/fields
  - Select Search

By Punch-out Vendor

This allows you to access the vendor’s website, search for products and add them to your cart in TechBuy. The navigation varies from vendor to vendor.

- Click the icon representing the vendor
- Shop within the vendor site
- When the order at the vendor site is submitted you are taken to an Active Cart in the TechBuy site
Carts

There are several ways to access a Shopping Cart.

- Use the **carts** tab from the home page
  - Access Draft Carts (carts that you have put on hold)
  - Access My Requisitions (to copy previous PRs to an Active Cart)

- Click on the Shopping cart in the upper right hand corner to get to an Active Cart

- Access **Favorites** – Favorites allows you to save catalog items to add to an Active Cart at a later time
• Access **Quick Order** – allows you to search by catalog number and add items to an active cart

### Quick Order Search

<table>
<thead>
<tr>
<th>Nickname</th>
<th>Qty</th>
<th>Catalog No.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calculator, 12 Big digit, 4 1/2L x 2 1/2W x 5/8in.</td>
<td>1</td>
<td>#1209923-1200025</td>
</tr>
</tbody>
</table>

**Add to Active Cart**
Active Cart Checkout

After selecting items for purchase via Forms, Catalog and/or Punch-out and adding to your Active Cart:

- Click on the Cart icon in the upper right-hand corner of the home page.

Once in Active Cart:

- **Add Products** → Return to Forms or Product Search to continue shopping.
- **Edit Cart** – Select Line Items to:
  - Add to Favorites
  - Remove Selected Items
  - Remove All Items
  - Move to Another Cart
  - Add to Draft Cart or Pending PR/PO
- **Review** (Overall and By Line Item)

- **Summary** – overall view and access to edit PR/PO
  - **General** – Change Cart Name and description
  - **Shipping** – Edit Ship To and Delivery
  - **Billing** – Edit Bill To and Enter P-Card Information
• **Accounting Date** – Will identify which fiscal year you are shopping in – use today’s date for current fiscal year; Use September 1st for future fiscal year purchase.

Use 9/1/2008 for FY09 orders. The date will determine if TechFim (FY08) or Banner FOAP (FY09) is used.

• **Purchase Requisition Accounting** – this is your **Header**
  - Use TechFim for FY08 orders
  - User Banner FOAPAL for FY09 orders

• Use the edit key to enter your accounting information

• A chart selection is required when entering a FOAP;
- click on Select from values to access search fields – Search by Value or Description
  o If funding information was saved in your profile, you will also have the option to “Select from profile values”

- Choose from Search Results; Click Select
- After entering all Required Accounting Fields, SAVE

NOTE:

FY08 Orders require TechFim Account Number, Object and Sub-Object

FY09 Orders require Banner Chart, Fund, Organization, Account and Program

Edit By Line Item or Split Accounting Information

Split Header Information by clicking on Edit

Split by Percentage of Price or Quantity

Click on Add Split

SAVE
Edit By Line Item

Click on View Edit by Line Item in Header field

Click on Edit at line item

Click on Add Split

Line Items can be split by:

- By percent of amount or quantity
- By amount of price or quantity

Add split information; Add Split; Recalculate Values; SAVE

You may also Select Line Item; Click Go after selection

- Add to Favorites
- Remove Selected Items
Remove All items
Move to Another Cart
Add to Draft Cart
Line Item History

Supplier Info – SELECT TTU Fulfillment Center!!!!!

Catalog orders require a Fulfillment Center for Vendor Billing. If the TTU Fulfillment Center is not selected, your order will fail. Check Fulfillment Center for each Vendor in your Purchase Requisition.

Click on Edit next to Vendor Address (NOTE: if there is no Edit, Fulfillment Center checking does not apply)

Fisher Scientific Company LLC
HSC Fulfillment Center
900 Stewart Dr, Plano, TX 75074-8145 AL

Change Fulfillment Address from drop down selection and SAVE

Recurring and Advance Payments may be identified at the line level on each PR by using the Edit feature for Forms purchases
**Internal and External Notes**

Add Internal and/or External Notes and Attachments to your requisition by using the Edit button or clicking on *add attachment*.

Notes and Attachments may also be added at the line level through Edit.

As we transition to Banner, enter your TechFim Account Number in Internal Notes when entering an FY09 order.

**PR Approvals** – Review approvals for requisitions.

It is important to always check your PR Approvals prior to Submitting your requisition – Fulfillment Center Errors will be shown here and the workflow steps needed to complete your requisition. To return to your PR, Click Review.

**PO Preview** – Preview PO(s) before submitting.

**Submit Requisition**

**Assign Cart** – Assign your cart to another user.
Purchase Requisition Review

Under Review on the Home Page, access My Requisitions folder to review the status or to access your requisitions.

Requisitions that you have processed will remain in this Folder until your Remove them. All Requisitions may also be accessed through History.

Click on a Requisition No. that you would like to view. You may also see the status of your requisition from this folder. Click on legend or hover over symbol for status definition.

- Review PR Approvals – shows workflow steps taken for that particular PR
- Review History – shows history for that particular PR, also provides notes from Approver
- From Supplier/Line Item
  - Access PO(s) assigned to each vendor. Click on PO Number to view PO, PO Approvals, PO History, Receiving against the PO
For Form PRs, you may view the form by clicking more info.

Select Line Items; Choose Action; Click Go
- Add to Favorites
- Add to Active Cart NOTE: use for rejected line items
- Add to Draft Cart

Rejected Line Items

You may add all or individual line items from a submitted requisition to an Active Cart to make corrections and submit on a new PR. NOTE: if a PR is Partially Rejected, the approved line items were submitted to the vendor.
TechBuy Approval Process

Users with permissions to review purchase requisitions and/or purchase orders are referred to as Approvers (Financial Manager and Approver Roles).

Workflow

The workflow process begins when a cart is submitted in TechBuy and continues through when the purchase order is sent out to the supplier. The two major phases of workflow are Purchase Requisition (PR) workflow.

Sample View of Workflow

The graphic below shows an example of the steps in PR workflow for an order that is purchasing radioactive material.

performing approval tasks

In order to approve requisitions, you must have the appropriate approval permissions. Permissions are granted through role assignment and/or individual permissions being granted by a system administrator. Approvers can choose whether or not to receive email notification when an order requiring approval lands in their “queue.”

Receiving Workflow Notification
Approvers are notified of requisitions requiring attention in one of two ways:

1. Approvers are notified via email (must be set up in profile) when a document has been routed to their personal folder or to one of their assigned workflow folders. This email contains a link that takes the recipient directly into the appropriate approval area. It is important to remember that multiple people may receive the same email if more than one approver is allowed to approve the same type of order.

2. The Review Section on the TechBuy Home Page provides approvers with a summary of the documents available for review in workflow.

Review Approval Notifications

1. The Review section displays the number of documents that are in the Approver’s folders (Pending) as well as the number of documents that are still awaiting review (Not assigned).

2. Click either My Approvals or a specific folder link in the Review section to view the documents in the workflow folder.

Moving Requisitions to My Approvals Folder

Select and reserve a requisition or purchase order for approval review. These steps will move a document to a user’s My Approvals folder.
1. Reference the **Review** section on the TechBuy home page.
2. Select the **My PR Approvals** folder or a specific folder link in the **Review** section to view the documents in the workflow folder.
3. To move documents to your approval folder:
   - Select a document from an approval folder with a state of **Not Assigned**. Note: Documents that have been assigned will not have the Assign link available.
   - Click the **Assign** link in the Action column to move the document to the **My Approvals** folder. The document is now in the user’s personal approvals folder, and the approver’s user name is now listed under the Approver column as shown above.
   - To quickly move multiple documents to your approval folder: Enable the **Select** checkbox for the individual items that you would like to assign to your approvals folder OR enable the top Select checkbox to enable **ALL** available line items. After you have selected which documents to assign, select the Assign option from the Apply Action drop-down box.
4. After you have moved the item(s) to your approvals folder, the next step is to review the requisition or purchase order for processing.
**Reviewing a PR**

An approver can review all the details of a requisition as part of the approval process.

1. Reference the **Review** section on the TechBuy Home Page. The approvals screen displays.
2. Select the **My Requisitions** folder.
3. From the My PR Approvals table, select the **view**... link to the right of the **requisition number** to access the details of the document.
4. Once you open the document, you may review in order to determine whether to approve or reject.

**Approving a PR**

The approver can quickly complete the approval process once the review of the document is complete.

1. **QUICK APPROVALS:** If you do not need to open a requisition before it is approved:
   
   a. Click the **Approve** button for an order that is found in you’re my Approvals folder.
   
   b. If one or more orders are in a shared folder, click on the Select checkboxes for the appropriate documents, then select **Approve/Complete** from the Action drop-down list box.

2. **STANDARD APPROVALS:** With standard approvals, the approver opens the order and reviews the information and makes any changes if needed, and then approves the order.
   
   a. Open the document (requisition or order).
   
   b. Review the information and make updates if needed.
   
   c. Click the **Go** button at the top of the screen. Make sure the **Approve/Complete** option is selected.
To reject an entire requisition, you must reject all the line items for the document. TechBuy also allows you to delete select line items from a requisition or order. This exercise explains how an approver can reject documents and lines from PR documents.

1. Open the requisition. Note: There is not concept of “Quick Reject” in TechBuy. The approver is required to open an order before it can be rejected.
2. Select one or more line items to reject by clicking the checkbox to the right of the price. Alternatively, click the checkbox in the column header row for EACH supplier to select all lines (for the supplier).
3. Select **Reject Selected Items** action from the drop-down box, and select the **Go** button to reject the line items.
4. Enter a rejection reason in the comment pop-up box.
5. Select the **Reject Line Item** button to save the comment and reject the line item(s). The rejection is not finalized until the workflow step is complete.
6. Select **Approve/Completed** from the **Available Actions** drop-down box.
7. Click the **Go** button to complete review of the requisition, which will then move to the next step in workflow, if appropriate.

### Assigning a Substitute Approver

If an approver is absent or does not have access to the application, he/she can designate another approver as their substitute. The substitute is able to review documents routed to the original approver. Substitutes are assigned at the folder level from the Approvals screen.

1. Access the Approvals section of the application (via the home page, an email, or the approvals navigation tab).
2. Determine which folder(s) that you would like to set up a substitute approver for and follow the directions below for EACH folder:
3. Select the **Assign Substitute** link in the upper right-hand corner of the **My PR Approvals** section.
Please note that substitutes can be assigned to any folder to which the original user has access. The procedure is the same as shown in this exercise except that a user selects the Assign Substitute link next to the corresponding folder.

Enter specific user criteria to find the recipient of the forwarded requisition.

4. Click the Search button.
5. Select the appropriate user using the radio button to the left of the user's name.
6. Click the Choose Selected User button to assign that individual as the substitute.
7. Click End Substitution to remove the substitution setting for that folder.
History in TechBuy

You may review your TechBuy History by clicking on the History tab or clicking on History under Review on the Home Page

Once in History, you have several options for searching – the top tab dictates the search area in TechBuy. **NOTE:** you must be in PO History to look up by PO No. or in PR History to look up by Requisition

You may search for specific documents, by supplier or catalog number. Check Filter for additional search capabilities.
After Checking Filter, you may search by date, user, department, status, etc.

Results will allow you to drill down to requisitions and purchase orders to review status, approvals and history of document. You may also open a requisition or purchase order to copy to a new cart.
Receiving in TechBuy

Access the Settlement tab in TechBuy to enter receiving information against your TechBuy Purchase Orders.

Select Create Quantity Receipt or Create Amount Receipt

After selecting type of Receipt, search for the PO you want to process receiving against. Use Filter for more detailed search.
Enter Header Information if applicable. Enter Quantity Received, Select action for line item: Received, Returned, Cancelled. **SAVE**

Click on Add PO

Save Updates

Complete

**Create Qty Receipt**  **Create Cost Receipt**

Receipt No. **16828** has been created for the following PO No(s):

- PO/Reference No. **TB008110**

When you review PO History, you may review receiving information for that document
### General Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>PO Reference No.</td>
<td>T80811B</td>
</tr>
<tr>
<td>Vendor Name</td>
<td>A Pony For Your Thought</td>
</tr>
<tr>
<td>Purchase Order Date</td>
<td>6/19/2005</td>
</tr>
<tr>
<td>Total</td>
<td>55.00</td>
</tr>
<tr>
<td>Order Number</td>
<td>123456</td>
</tr>
<tr>
<td>Supplier</td>
<td>John Doe</td>
</tr>
<tr>
<td>Internal PO REF #</td>
<td>789012</td>
</tr>
</tbody>
</table>

### Line Item Status

<table>
<thead>
<tr>
<th>Item Description</th>
<th>Catalog No</th>
<th>Size / Packaging</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Ext. Price</th>
<th>Supplier</th>
<th>Order</th>
<th>Received</th>
<th>Matched</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item 1</td>
<td>L024</td>
<td>50.00</td>
<td>75.00</td>
<td>10</td>
<td>750.00</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
</tr>
</tbody>
</table>

**Total:** $888.88 USD