Finance and Administration

TEXAS TECH UNIVERSITY
Office of Procurement Services

TechBuy New User Interface Navigation
The current dashboards in TechBuy have been optimized to provide quick and easy access to widgets and information that is most useful to each user role. These dashboards allow a more user-friendly experience with a concise presentation of information for each user.

TechBuy Homepage
In this section, we will compare the old and new TechBuy homepage interface. Introductions to the new dashboards will be shown as well as other key features and information.

Old Interface
The old interface was a one-stop-shop for all TTU punch-outs and hosted catalogs. Due to the design of the one-stop-shop, this left the homepage extremely linear and left vital information either at the top or bottom of the page. Shortcuts to our most commonly used forms have been moved off the TechBuy homepage to the new “Shopping Home” Dashboard. The informational links have been updated and saved to the new homepage interface.

Supplier Search has been removed from both homepages and the Shopping Search has also moved to the new “Shopping Home” dashboard in the new interface.

Old Interface
The e-mail to TechBuy Support in the old interface has moved to the Organization Message in the new Interface.

Supplier Search
With the removal of Supplier Search from both interfaces, we wanted to remind users that they can still search for Suppliers by utilizing the Supplier widget.
New Interface

In this new interface we have designed the homepage to include a variety of information regarding purchasing, contracting, invoicing, receipting, approving, and support. As you will find below, the Organization Message includes pertinent information that will be beneficial to users making specific purchases as well as Procurement Trainings and other general announcements. The organization message will be updated periodically so be on the lookout for future updates!

TechBuy Tips has also been introduced to the homepage! This is a feature that will include how-to guides and other helpful information to users who consistently use TechBuy. These tips will be updated frequently so be sure to check back regularly for our newest tips, resources, learning opportunities, and more!

Shopping Home

The Shopping Home is your new one-stop shop for all of your TechBuy purchasing needs. On this page, we have created a dashboard for Common Forms, Procurement Support, and Product Categories.

The Common Forms dashboard brings you to all TechBuy related forms (Non-Catalog, Change Order, Guest Lodging, etc.)

The Product categories dashboard contains pertinent information beneficial to the end-user, such as general information, vendor contacts, and recommended account codes.
The Procurement Support dashboard contains departmental support information for all procurement related needs. Inquiries should be sent to departments that can directly assist your specific needs. Please note that the provided e-mails are monitored at all times, so questions can be redirected in case of an employee absence.

Other helpful widgets found on this dashboard include Document Search, My Drafted Carts, My Approvals, My Action Items, and My Bookmarks.

The Receiving Dashboard will help you identify when a receipt is required and will assist you in creating a receipt. There is a convenient table in the bottom right column that will list individual purchase orders that require receipts. If you are experiencing difficulties, the quick links widget has helpful information that can further assist.

**Procurement Support**

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**Texas Tech University**

**The Payment Strategies Team** is available to assist you with your questions.

When is a Receipt Required?

It is always best practice to create a receipt for all POs to verify receipts of goods and services to reduce fraud.

Advanced payments of goods or services require a receipt at the time the goods or services are delivered or rendered, not at the time of payment. If a PO has already been paid, it does not relieve the department of the obligation of creating a Report as required.

A Receipt is Required for the following Payments:

- Invoices exceeding appropriated funds (Funds beginning with 11, 12, 13, or 14);
- Invoices exceeding sponsored program funds (Funds beginning with 21, 22, or 23);
- Invoices that are $10,000 or more; and
- Invoices for capital account codes (account codes: 701190, 700230, and any account codes beginning with 7).

Creating a Receipt in TechBuy:

1. Open your purchase order in TechBuy.
2. In the upper right corner under available actions, select either Create Quantity Receipt or Create Cost Receipt.
3. Note: Generally, a cost receipt is used for services and a quantity receipt is used for goods (including equipment).
4. Enter Receipt Information:
   a. Enter a description in the Receipt Name field.
   b. Update the Receipt Date to the date that the goods or services were delivered or rendered.
   c. The invoice shall be attached to a comment on the Purchase Order with Payment Strategies copied for notification.
   d. Enter pertinent information in the notes section that will assist the Payment Strategies Team.
The Invoicing Dashboard will assist with your invoicing needs. This dashboard will include information on how to request payments as well as links to training, how-to guides, operating policies, and receipting. Additionally, there are 3 tables that show the following:

- My purchase orders that need receipts for the fiscal year to date (FYTD)
- My purchase orders that need an invoice or a receipt attached to them FYTD
- My paid invoices FYTD
Contracting

The Contracting dashboard contains estimated completion time for various types of contracts as well as information on how to submit a contract. Specific Contracts can be found by using the "Search for a Contract" widget at the top of the page.

Additional Information such as access to the Contract Routing Sheet, links to the operating policies, and a link to the procurement services website can be found in the Quick Links widget.

If you are experiencing difficulties with the contract submittal process, or have further questions, please e-mail the Contract Administration Office.

Approvals

The Approvals dashboard contains requisitions that are pending your approval as well as an action Item widget. These widgets are composed of tasks that will require your action or approval. There is also a quick links section that is available to the right of the page and will provide general information that can assist you in your review prior to approval. Lastly, the "My Bookmarks" widget is a useful tool that will show any shortcuts you have previously saved which will provide quick access to different pages in Jaggaer.