TechBuy

 Administration and Finance
 Information Systems
 Management
Introduction to TechBuy

**TechBuy** is a shopping mechanism used jointly by Texas Tech University System, Texas Tech University and Texas Tech University Health Sciences Center.

It is important to know in advance of using the TechBuy system that TTU has a “Conflict of Interest Policy (OP 72.03)” which speaks to Officers, Faculty and Staff (“employees”) of TTU:

The purpose of this Operating Policy/Procedure (OP) is to define conflicts of interest with respect to (1) the conduct of employees and (2) payments, purchases, and/or contracts by Texas Tech University or related entities (TTU) in compliance with Texas Government Code Sec. 572.001 and Chapter 03 of *The Rules and Regulations of the Board of Regents of the Texas Tech University System* (Regents’ Rules).

A TTU Department may not hire a vendor under the following circumstances:

1. A current employee of such department is also employed by such vendor
2. A current employee of such department has a direct or indirect ownership interest in such vendor; and/or
3. The hiring of such vendor would result in the furtherance of any private interest or gain for a current employee of such department.

The OP can be read in its entirety at: [http://www.depts.ttu.edu/opmanual/OP72.03.pdf](http://www.depts.ttu.edu/opmanual/OP72.03.pdf)

**TechBuy Roles**

- **Financial Manager** – A TTU or TTUS employee who has authority in Banner and in TechBuy for a specific org code. This role has unlimited account approval authority (up to the budgeted amount for that account). Financial Managers are responsible for registering Approver, Requestor and Shopper roles for use of specific Organization Codes in TechBuy and removing that permission should there be a personnel change. Financial Managers are responsible for complying with University budgets and spending funds for the purpose intended. When person having this role creates requisition, it is automatically approved for budget purposes, but still must go through other required workflow approvals.

- **Approver** - A TTU or TTUS employee who has permission in TechBuy to shop and approve transactions. An organization code can have up to 3 people assigned the role of Approver. This role has unlimited account approval authority (up to the budgeted amount for that account). Approvers are responsible for complying with University budgets. Approvers may assign shopping permissions to other users. Requisitions created by this user are automatically approved up to approval authority amount for budget purposes, but still must go through other required workflow approvals.
• **Requestor** - A TTU or TTUS employee who has permission in TechBuy to shop and have limited approvals. This role has approval authority up to $5,000 on any organization code for which they have permission. Any requisition greater than $5,000 coming from an individual with this role will require approval of a higher authority (Financial Manager or Approver). Requisitions submitted by a requestor up to the amount of $5,000 are automatically approved for budget purposes, although it still must go through other required workflow approvals.

• **Shopper** – A TTU or TTUS employee who has permission in TechBuy to shop. This role has no approval authority. Any transaction submitted from an individual with this role will require approval from a higher authority (Requestor up to $5000; or Financial Manager or Approver greater than $5000).

**TechBuy Definitions**

• **Cart** - A virtual shopping cart which holds various items a user has selected for purchase. Only one vendor is allowed per cart. The cart is accessed by clicking on the cart icon in the top right corner of the screen or by selecting the cart tab. More than 1 cart may be active at a time.

• **Requisition** - A requisition is a request to order, also known as Purchase Requisitions (PRs) in TechBuy. Requisitions are not final until they have gone through the entire approval process and become a Purchase Order.

• **Purchase Order (PO)** – The purchase order is submitted to the vendor after all workflow approvals and upon encumbrance in Banner. This is a finalized requisition and is a legal document that binds the University and the vendor. Once a PO is submitted to the vendor it is not easily cancelled unless agreed upon by the vendor. Punch-out POs cannot be cancelled. A Purchase Order is required for all purchases of goods and services for the University that are not made using a P-Card and must be made prior to any commitment.

• **Punch-out** – A vendor type in TechBuy. Users actually accesses vendor’s website through the TechBuy system. Each Punch-out site has a different layout and functionality. This is a contract vendor and special pricing and other benefits such as free shipping are received when accessed through the TechBuy System.

• **Hosted Catalog** – A vendor type in TechBuy. Catalogs in TechBuy are virtual catalogs created by each vendor and hosted on the TechBuy site. Catalogs will be updated periodically based on the contract with the vendor. Contract pricing is provided with the hosted catalog.
- **Non-Catalog/Forms** – Used when items are not available through hosted catalogs, Texas Tech catalogs, or punch-out vendors. There are various forms available in TechBuy, and the end-user selects the appropriate form based upon the purchase being made.

- **Texas Tech Catalogs** – the University can load contract pricing for some goods and services for which the University has established contracts. The user can enter key words in the “shop-at-the top” to retrieve the contract pricing (ex: bottled water, business cards, copiers, etc.)

- **E-Invoicing** – A vendor submits an electronic invoice into the TechBuy System. Payment is scheduled 10-15 days after the receipt of the invoice in the system and is automatically made to the vendor.

- **Electronic Receipt** – a required acknowledgement of the receipt of any goods or services that are purchased. An electronic receipt is required on all purchase orders greater than $5,000 and is required on all purchase orders, regardless of dollar amount, for funds whose codes begin with an 11, 12, 13, 14, 21, 22, 23, or 24.
System Overview

Login to TechBuy

TechBuy is accessed from Raiderlink. Select TechBuy from the Procurement Services Channel within the A&F Work Tools tab.

*Note: In the event that Raiderlink is down, access TechBuy directly at: techbuy.ttu.edu.

TechBuy Home Page:

The TechBuy Home Page is divided into 2 sections:

1. The top section provides user access to “quick functions” for convenience:
   a. User Information – view / set profile, set home page, logout of system, view recently completed requisitions and pending purchase orders
   b. Bookmarks – save a link for easy access to information
   c. Action Items – items that need your attention
   d. Notifications – information about requisitions and purchase orders
   e. Quick link to Cart – view contents or move to checkout
   f. A quick search field that allows quick search by catalog SKU, PR number, invoice number, or PO number.

2. The center of the Home/Shop page has:
   a. Shop at the top allowing to search by category and keyword
   b. Go to and browse links to often used areas
   c. Links to Suppliers - Hosted Catalogs section followed by Punch-out vendors
   d. Links to forms which are used for various types of purposes
**View My Profile**

Each user who has permissions in TechBuy has a profile that provides information about that user as well as departmental information that applies to their purchases within the TechBuy system. This profile is created to provide efficiency within the system, supporting actions such as system generated emails, ship to and bill to information and payment details.

To Access profile, open the dropdown beside your name in the upper right of the home page and select “View My Profile”

My Profile provides access to four areas: View My Profile, Set My Home Page, Logout, and Search Help for A Solution (do not use this option).

**View My Profile**

The following options exist within “View My Profile”
Select the link “User Profile and Preferences”

The subcategories found in this section include:

- **User’s Name, Phone Number, Email, etc.** – Modifications can be made to: First Name, Last Name, Phone Number, E-mail Address, and Department. The email address is important as users receive emails regarding the status of activity within TechBuy.

- **Language, Time Zone and Display Settings** – Choose Language, Time Zone, and Color Theme. The color theme is the only change suggested in this section.
Select the Link “Default User Settings”

Custom Field and Accounting Code Defaults. Save the FOPs that you will use for purchases to your profile in this area.

Select the tab titled “Code Favorites”

Setting a FOP/FOAP to users profile allows for quick submission by having a default FOP/FOAP and additional FOAP(s) saved to the user’s profile. To create this, select “Add” as shown below:

After selecting “Add”, a new window opens. In the top section, provide a nickname for the FOP/FOAP that is being entered. There is a default check box provided allowing indicating which FOAP is expected to be used for most purchases. Type the Chart, Fund, Organization, Account (opt) and Program codes in the fields provided. Each must be followed with a –T, -H or -S when entered. Select Save.

The link to Select from all values allows a key word search to find the values within the system.

The search allows search by the first character / characters of the FOAP element in order to locate the value desired:
**Note – if a new FOP has been created and the search does not find those values the TechBuy system, please notify techbuy.purchasing@ttu.edu.

Adding and Modifying FOP(s)

If desired, more than one FOP may be saved to a profile. This is useful if more than one account will be used to pay for purchases. At the time of checkout, the default FOP can be modified for the entire requisition or for each line item within the cart.

To add additional FOP to a profile select the add button, provide a nickname and enter the Chart and FOAP elements. They will display within this window as shown below. Notice that the default displays and the FOP is identified below the nickname entered.

To modify the information, select the Edit button and to remove it, select Delete.

*User may not want to add Account Codes as these may vary with items purchased

To learn about allowable expenses by fund group, follow the link below:
http://www.depts.ttu.edu/afism/AFISMFomRepository/ProcurementDept/PurchasingAndContracting/Training%20and%20Work%20Aids/Allowable%20Expenses%20by%20Fund%20Group.xls

Default Ship To Addresses.

The window opens with the Ship To information displaying. A shipping address is defaulted with the user registration, as shown below with a code beginning with TLUXXX. Click on the Code to view the address. It may need to be deleted and a correct address added. Note** Do Not modify the Bill To address.
To edit the Ship To Address, click on the Code in the Shipping Address Box. If incorrect, select "Delete Address. To add ship to addresses, click on the Code in the Shipping Address Box. Select Addresses for Profile. In the Address Search section, search on building name or street. In the Addresses Found section, review complete address and click inside radio button to left of desired address.

Once you select the address, the Edit Selected Address option opens. Give the address a nickname; enter the room number and select Save. Repeat steps to add additional addresses to profile.
**Cart Assignee – Save “Assignees” to your profile.**

This allows the user to save approver names to "My Profile" so that a cart can be assigned to them. When a cart is assigned, only the person it is assigned to will be able to see and take action on the requisition. Your “Assignee” must have permission at least as a shopper on the org code you have permission to shop for.

Search by name (legal name). It is often best to search by last name only. Or, you may execute a department search, using the drop down to select unit or department:

To select an assignee, click [select] within the “Action” column:

More than one assignee may be identified, however only one can be selected as Preferred. When Assign Cart action is selected, the Preferred Assignee will automatically populate the select screen with the opportunity to change assignee at the time the cart is submitted. Notice the option to remove Assignees as well.
Select the Link Notification Preferences. Choose how you want to receive notices regarding your activity within TechBuy.

If notification preferences are already set, the method will display just to the right of the type as shown below. To choose notifications click on the “Edit Section” link in the upper right of the window:

Select notifications to receive and how to receive them using the drop down to the right of the notice type. Email will be sent to campus email and notification appears in the notifications section of TechBuy. If the notification is not needed, select none. Be sure to “Save Changes” when finished. You can select options to all categories within Notification Preferences section.
Action Items / Notifications

Located in the upper right section of TechBuy are the Action Items and Notifications links.

Action Items contains notifications regarding Assigned Carts, Approval information and Returned requisitions

![Action Items](image)

My Assigned Approvals – (Approvers / Requestors only) Transaction must be assigned to you in order to view in Action Items
- Carts assigned to you
- Requisitions assigned to you for approval

Unassigned Approvals- (Approvers / Requestors only) Items in your approval folder but not assigned to you. All approvers can see these items
- Unassigned requisitions needing approval

Orders (for shoppers only)
- Any requisitions returned automatically by TechBuy (banner failure to budget not available for purchase, no permission on orgn code) or by an approver

View notifications regarding activity on Shopping, Carts and Requisitions:

![Notifications](image)
Create a Cart

There are 3 options available within “My Carts and Orders”:

- **Open My Active Shopping Cart** - opens the active cart for the user
- **View Draft Shopping Carts** – opens the page containing all pending draft carts including those assigned.
- **View My Orders (Last 90 Days)** – provides detail on the orders submitted in the last 90 days

A best practice is to create a cart in TechBuy prior to adding any products. A cart is created by selecting the “Shop” icon , clicking “My Carts and Orders”, and then select “View Draft Shopping Carts”.

If you have an active cart, it will display in the “My Drafts” area. If you add to an “Active Cart”, it is important to know that budgets are checked as of “Date Created”. Only one vendor is allowed per cart.

To add items to an active cart, click on the “Shopping Cart Name” field. To remove a cart, select the “Delete” button.

To create a cart, select to begin a new cart. You can name the cart (optional), (save changes) and then can begin shopping by clicking on the “Click here to start shopping” link.
Shop Sidebar

Using the side bar menu you can search and shop without accessing the Home Page.

**Keyword, Catalog Number CAS Number**

Select the shopping cart icon. A small window displays and within it select search type and enter search criteria. Select the search icon. When using the search functions within TechBuy the search is looking at products offered by hosted catalog, punch-out and contract vendors.

From the search results, select the desired item. In the screen shot below, the top item can be added to the cart immediately, while the second item would require that the link Order from Supplier be selected (Punch-out Vendor) which would take you to the supplier’s website and allow you to order from there. Remember only one vendor is allowed per cart.
From the sidebar menu, you may also select Options within the “Go To” and “Browse By” sections rather than access the home shopping page for your shopping needs.

**Go To:**
- Advanced Search – Enables a more advanced search, by SKU, by Manufacturer, etc
- View Favorites – See favorites that you have saved or that are set up for the university (does not display favorites within a punch-out)
- View Forms – See all non-catalog forms for Texas Tech (memberships, guest lodging, etc.)
- Quick Order – Select category, enter SKU and items will be added directly to cart

**Browse By:**
- Suppliers – View all active suppliers in TechBuy. Click on the filter to further identify the supplier needed.
- Categories – Allows you to shop by categories (ex: Books, furniture, medical). Click on the “+” symbol next to the category to drill down into subcategories.
- Contracts – Search for contracts based up contract name, description, contract number. If you cannot locate a known contract, make sure the active status is set to all and the contract status is blank (not set to effective).
- Chemicals – You are able to enter product name, CAS number, molecular formula or weight, type or by drawing the chemical structure.

**Shopping Home**

This takes you to the page with the Hosted Catalogs, Punch Out vendors, Forms and other search options. **This is the default home page within Cognos.**
Category key Word Search:
Select Category, enter key word(s), click Go. TechBuy will retrieve goods and services based upon matching keywords. The goods and services can come from hosted catalog, punch-outs (when the vendor has the capability), and from Texas Tech catalogs.

In the simple search, all of the words entered must be present in order for a match to display in product search results. If no search results are available, the search engine will expand this to use “any of the words.” When searching for a part number or SKU number, if no search results are available, the system will look for previous orders of the part number.

Advanced search is often used when a shopper is searching for more specific criteria, such as a specific supplier, manufacturer number, etc. When advanced search is used and multiple criteria fields are populated, and if no search results are available, the system automatically opens up the search. It will remove the additional criteria and only search for keywords and/or part numbers in an effort to locate the item the users is looking for.

Showcases holds both Hosted Catalog and Punch-out vendors as well as Forms.

Hosted Catalog – Catalogs in TechBuy are virtual catalogs created by each vendor and hosted on the TechBuy site. Contract pricing is provided with the hosted catalog. For the hosted catalog, a search box opens with a field for either a key word or SKU search. If it is desired to view the entire catalog, leave search field blank and select the search button:

The search results provide details regarding products that are related to the keyword or SKU entered. Filter options are active in column to left of window to further refine the entered search. To the right of the item description is an entry field for number of units needed and a select button to “Add to Cart”. The link labeled “compare” provides to select 2 or more items in order to review the features and costs of each.
Refine and Filter Search is available when the initial search returns too many results. This is located in the column to the left of the search results as shown in the screenshot on the following page.

The Sort by Box above the search results allows for sorting by Best Match, Part Number, Description, Size, Unit of Measure, Supplier, or Price.

A Keyword entry field is positioned above the Filter results allowing for further definition of desired results.

Within the Filter Results, found in the left column, is a filter icon allowing to further filter within the grouping by clicking on the + and selecting from the displayed items.

To display the entire listing within the particular group, click on the link labeled more....

To the right of the window are options to add items to cart, save items to Favorites or Compare items by viewing the attributes of each.

Use the Filters within the left menu to remove undesired items from the search results. Menu option on right allows to select item, add the item to “Favorites” or to compare selected items.
Click “Add to Cart” from right menu to purchase item.

Punch-out – A vendor website in which a user actually accesses vendor’s site through the TechBuy system. Upon completing checkout, the user is returned to TechBuy to complete the requisition. This is a contract vendor; special pricing and other benefits such as free shipping are received when accessed through the TechBuy System. Each punch-out has different capabilities.

To review the capabilities of each, go to:

- Procurement Services > Departments > Purchasing and Contracting > Purchasing Contracts > Vendor Punch-out Capability Summary
- **TTU has an exclusive office supply agreement with Summus Industries/Staples. A list of those items for which it is mandatory they be purchased from Staples, go to the Procurement Services Website and look under news http://www.depts.ttu.edu/procurement/news/**

To exit the punch-out vendor without making a purchase, select the Cancel Punch-out button as shown below:

Non-Catalog/Forms – Orders not available through hosted catalogs, Texas Tech catalogs, or punch-out vendors are non-catalog orders. There are various forms available in TechBuy; the form used depends upon the purchase being made.
Summary of Common Forms:

Blanket Order – This is used when there will be multiple purchases of the same goods or services repeatedly during a fiscal year (ex. Toner Cartridges).

Change Order – This is used to make a change to an existing Purchase Order.

Gifts, Awards & Prizes – This form is used to submit purchase of any gift, award or prize. Promotional items purchased in bulk as a giveaway to promote the University are not a gift, award or prize. These expenses must comply with OP62.25.

Guest Lodging – This form is used to reserve a hotel room locally at a contracted hotel, and is to be used only for guest rooms. The process for guest lodging is found on the P&C website.

Membership – This form is used for any membership transaction. This does require advance pay. A Pcard can be used for memberships, except for Sam’s membership which requires this form.

Non-Catalog Form Master - This is the form used most often. It is used for most transactions not completed using a punch-out vendor or hosted catalog.

TTU Direct Pay – Direct Payments must be made in TechBuy using the TTU Direct Pay form. Categories allowed include: Book Buybacks, Citibank Payments, Investment Fees, Reimbursements to Petty Cash, Research Participant Payments, Royalties, Special Events / Game Officials, Utilities, University Deposit Payments.

TTU Vehicle Rental – This form is used for online reservations from either Enterprise or National Car Rental. With either company, the order is placed through Enterprise Rent-A-Car.
Browsing and Shortcuts

The options for browsing include supplier, categories, contract and chemicals. The options for shortcuts include Favorites, Forms, Non-Catalog Item, Quick Order.

Browse: Suppliers

Search can be requested by supplier name or type. Icons display identifying supplier type and preferences. Click on Legend in upper right for definitions of the icons used in TechBuy.

Because Texas agencies are required to make good faith efforts to increase business opportunities for HUB vendors, the supplier search can be used to identify which of the vendors are classified as HUB, indicated by this icon.

For a punch out vendor, click on the punch-out icon and be directed to their website.

For a hosted catalog vendor, click on the catalog icon and be directed to hosted catalog.

For a non-catalog vendor, click on the form icon and return to home page of TechBuy, where user is directed to search catalogs prior to adding non-catalog item.
Browse: Categories

The category search is predominantly for hosted catalogs and Texas Tech catalogs (ex. bottled water). Search by Category, subcategory and then product. View option (link) is available to right of category.

Once product are displayed, use choices in box on left for refining search or on the right for adding to cart, adding to favorites or comparing.

Browse: Contracts

This allows viewing of the active contracts. The contract may be a general contract for the University (ex. Summus/Staples office supplies) or a specific contract for a department. Contracts for the Texas Tech University and System are numbered as CXXXXX with C as the identifier. A guide on how to search and view contracts is available on the P&C Website at: http://www.depts.ttu.edu/afism/AFISMFomRepository/ProcurementDept/PurchasingAndContracting/Training%20and%20Work%20Aids/Contract%20Training%20Guide.pdf
Browse: Chemicals
This search allows to enter product name, CAS number, molecular formula or weight, type or by drawing the chemical structure. The Purchasing and Contracting department has a short course available for this functionality. This class would be beneficial for research and scientific staff. Please email techbuy.purchasing@ttu.edu for training information.

Favorites
This section of TechBuy provides access to favorites by Organization. This eliminates the need to search for these items as they can be added directly from the Favorites page. User can also set up favorites based upon what they purchase frequently. Punch-out vendor items cannot be added as a favorite.

Create your favorite:
1. Select Add New,
2. Select Top Level Personal Folder
3. Name the Folder, save changes
4. Add items to favorites as desired, from search results or during checkout.
5. To edit or delete folder, select Folder Actions within Folder
Shopping to Checkout

Moving from shopping to checkout can be accomplished 3 ways:

1. Click the cart icon in the upper right of the window.
2. Click the shop icon in the left menu, select My Carts and Orders > Open My Active Cart
3. Click on the link in the lower right of the section after final item is added

If the Cart icon in the upper right of the window is selected, the following option displays:

View My Cart allows you to review and make edits prior to the check-out process.
View the Cart

The following actions can be applied at this point:

1. Name the cart for recognition
2. Exit cart and return to shopping
3. Complete the requisition by going to checkout
4. Assign cart to specific approver prior to checking out
5. Save any change made to the cart on this screen
6. Printing of requisition
7. Open a non-catalog form and add to this cart:
   a. Shipping or miscellaneous expenses
   b. Multiple line items for forms that are really long (ex: proprietary purchase, informal bid)
   c. Non-catalog forms are not to be used for punch-out vendors as they only recognize electronic entries
8. Empty entire cart
9. Select all items and perform action selected in drop down to those items
10. Apply any of the actions to the item identified in this area
    a. Add to Favorites, Remove, or More Actions
11. Access supplier information
12. Change the quantity and update the cart

Select Proceed to Checkout Or Assign Cart
Checkout

Prior to submitting the requisition, it is necessary to review for any errors and complete the funding section (Line and Header FOAP Summary) of the requisition. Errors will be highlighted in the upper section of the Requisition with a message regarding what needs to be corrected. Note in the screen shot below that the Billing Section, Line and Header FOAP Summary Section

Requisition Review

Prior to submitting the requisition, review to ensure it is accurate. Follow links in the upper section of the requisition or within the tabs of the requisition.

Review Shipping Details

Select the shipping link or click on the shipping tab within the requisition.

Or

On the next page is a screen shot of the options available to modify either the ship to address or to indicate that the shipping needs to be expedited.
Ship To – Edit

The default ship-to address in the users profile is applied to each requisition created. This ship-to can be modified within the requisition.

A common error, “address incomplete”, can be corrected by clicking on edit to the right of the shipping address. Within the Rm/Building line, enter a room number and then select save.

To modify ship to information, select the edit box to the right of the Shipping Address information. A window opens with options to edit the current shipping address; select from stored ship-to addresses or create a new ship to address

**Only the room number** is to be entered in the Rm/Building field. Entering a building name will cause the shipment to go to the wrong location, because “ship to” codes are hardcoded for vendors with electronic capabilities.

Another common error is to place ship to information within the notes section of the requisition. Ship to information is not to be entered within the external notes and comments section of the requisition, per audit and University policy.
Click on edit to the right of Ship to, the following window appears:

If your address is not available in TechBuy, request a new ship-to location set up, access this link:

http://www.depts.ttu.edu/procurement/purchasingContracting/documents/purchasingForms/Set%20up%20a%20New%20Ship%20To%20in%20TechBuy.pdf

Email the completed form to: techbuy.purchasing@ttu.edu

**Delivery Options – Edit**

Indicate if the order needs to be expedited, shipped via a particular carrier and include requested delivery date. These fields will not be completed on all requisitions, only when necessary. To expedite requisitions, choose Expedite. Only use this if the order is truly urgent. For extremely urgent orders, email techbuy.purchasing@ttu.edu
Review – Billing

Edits to the Accounting Date may be made in this area. The date is not often modified, but may be when encumbering funds for the next fiscal year. The Bill To details are not to be modified.

Review – Line and Header FOAP Summary

In this area the funding for the requisition is reviewed and may be edited. At this point, the entire requisition will be charged to the FOAP shown in the Line and Header FOAP Summary area. It is vital to review all products being purchased and to code accurately. The Account Code within the FOAP is what identifies what is being purchased. If there are multiple types of items on the requisition, the account code must be entered for each item.

**Link to the “Account Code Guidelines” from the Line and Header FOAP Summary within Checkout. Click on the “book” icon as shown below:
Funding Change - Line and Header FOAP Summary Level (entire requisition):

Select “Edit” to the right of the FOAP details to change funding information for the entire requisition:

In the window that opens, alternate values may be selected from profile values if these have been added to the user’s profile. Otherwise, the select from all values link may be utilized in finding the code or if the code is known, simply type in the field provided, ending with either a dash –T, -S, or –H depending upon the institution the purchase is being made for. Once the changes have been made, select SAVE. To cancel, select cancel.

Funding Change – Supplier / Line Item Level (each item):

Click on edit as shown in the lower section of screenshot below:
Change funding details as described in first paragraph on the previous page.

Funding Notifications:

When funding for the requisition is changed, the details are provided as shown in the highlighted areas below:

- (1) Shows that Funding for the requisition is not from the same FOAP
- (2) Shows that the line item is not funded by the FOAP in the header of requisition
- (3) Shows that this is funded by the FOAP in the Header
Copy Funding to another Item

It is possible within TechBuy to “copy” the funding information from one line item to another line item within the requisition. Notice that in the screen shot on the previous page, there are red arrows pointing to “copy to other lines”. If another item in the requisition is to be funded like this item, click on this link. You can select other items in the requisition to apply that FOAP to.

Notice the check boxes to the far right of the line item details. If the FOAP is to be used for payment of these items, click inside the check box and select copy. The FOAP will be copied to the selected items.

Split Funding

The cost of an item may be split among two or more FOAPs. This action must be applied at the line item level rather than the FOAP Summary Level. NOTE: Please contact Purchasing and Contracting when combining Charts or capital account codes. Capital Accounts begin with 7J0.

To split funding for an item among two or more FOAPs, have the Line and Header FOAP Summary tab selected, and then within the Item field, select edit (as shown below):
In the window that opens, select the link to the far right titled “add split”:

The “Funding Information” window opens. Within this window, enter the appropriate FOAP into the line provided, appending each with a –T, -S or -H:

1. Show if split is by amount of price or amount of quantity.
2. Enter in Dollar Amount or Amount of Quantity as a percent
3. Choose to remove a line, add an additional split or recalculate to ensure values are correct.
4. Save changes when split is complete
Internal Notes and Attachments

**Select**

The notes or attachments included here are visible only within the institution and not to the vendor. To add an attachment select add attachment and proceed like for an email attachment. To type an internal note click edit and enter information in the field provided. Select save when finished. The notes or attachments are for Payments Services / Purchasing. ARTWORK OR QUOTES SHOULD NOT BE ADDED TO THE INTERNAL NOTES SECTION.

External Notes and Attachments

**Select**

This section is used for things such as quotes, artwork and notes to vendor. The notes or attachments included here are visible to the vendor as well as within the institution. To add an attachment, select the link titled add attachment. To include a note, select the edit button typing the note in the field provided. Select save when finished. Ship to addresses should not be entered in this area.
Final Review

The requisition may be submitted from this screen. Other actions may be taken as well. These actions include:

1. **Change the Shipping Options at the line item level.** All items within the requisition will ship to the default “Ship To Address” set up to the user’s profile, and displayed in the shipping section of the requisition. It is possible to have each item within the requisition shipped to a separate address. Having more than one ship-to address on a requisition results in the requisition being split into multiple Purchase Orders. There will be one purchase order created for each ship to address.

   - Click on the line “View/edit by line item…” within the Shipping box.

   - Select edit to the right of desired area – Ship to or Delivery Options and make the changes desired. Select Save when complete.

   ![Shipping Options](image)

   ![Line Item View](image)

   ![Product Description](image)

   **NOTE** If the items on the requisition will be delivered to different addresses, the end result will be the requisition being split into multiple purchase orders when complete.
2. **Change the Billing Options at the line item level.**

   a. The Accounting Date can be changed in this area. The accounting date should be left off unless creating an order for the next fiscal year (in that case it should be 9/1/XX depending upon year). The next fiscal year is opened on May 1 of the current fiscal year.

3. **Indicate Recurring Payment, Advanced Pay, Invoice Attached, Taxable, Internal Notes and Attachments, External Notes and Attachments**
   a. **Recurring payment** – used for a regular payment made monthly, etc for example the lease of a storage unit is $100/month. A recurring payment could be setup for this PO. The amount must be the same each month and cannot change during the fiscal year.
   b. **Advanced Pay** – used when an advance payment needs to be made to a vendor. For example a membership fee needs to be pre-paid. Not all funds allow pre-payments.
   c. **Invoice Attached** – used to indicate that invoice is attached to requisition
   d. **Taxable** – N/A the University is exempt from Texas state sales tax laws.
      - Taxes of other states are not applicable if purchased in another state and shipped to a Texas location.
      - Other state sales taxes will apply if purchased and delivered in another state. The State of Texas is exempt from federal excise taxes for specified commodities. Email techbuy.purchasing@ttu.edu for assistance with taxes. To access a letter to send to the vendor for evidence of exemptions, click the following link: [http://www.depts.ttu.edu/AFISMFormRepository/ProcurementDept/Credit%20Tax%20Letter%20Updated.pdf](http://www.depts.ttu.edu/AFISMFormRepository/ProcurementDept/Credit%20Tax%20Letter%20Updated.pdf)
   e. **Commodity Code** – This field is not used
   f. **Internal Notes / attachments** - This is used when a note or attachment applies to only this item in the requisition rather than all items. This is visible to campus only.
   g. **External Notes/ attachments** - This is used when note or attachment applies to only this item in the requisition rather than all items. This is visible to vendor.
      - Select Edit in the Supplier / Line Item Detail box of the desired vendor
      - Make selections as needed and select either save or cancel.
4. Add a Comment

The comment section of the requisition is the preferred means of communicating and documenting within TechBuy. Comments may be added at any point – to a requisition, to a purchase order, to the receipted or to the invoice. In addition, the person creating the comment can copy anyone at TTU on the comments by selecting an email address. Documents can also be attached to the comment and shared with others.

a. Adding comments within a requisition:
   - Click “Add Comment”
   - Type comment into the comment field provided
   - Attach a document if necessary
   - Click “Add Comment” to add, or Cancel to exit without adding a comment
5. **Add Non-Catalog Item**

This link is used to add shipping charges, or to additional items from the vendor when a form is required. To utilize this option, there must first be a form created and placed in a cart. Do not use the link from the “Create a Cart” option to add a non-catalog item. Non-catalog items are not used with Punch Out vendors.

Once a form is in the cart, follow these instructions:
- Click on the link as indicated below the Vendors name
- The form will open, complete as needed
- Select From Save options at bottom of form

6. **Other Options**

Within the drop down to the right of “For selected line items…” are the options to take such actions as:
- Remove selected items from the requisition
- Remove all items from the requisition
- Move a selected item to another cart
- Add an item to a draft cart or pending PO
- View the history of a line item
- Add an item to Favorites
The screenshot below shows the drop down to select the desired action. Each item must be selected by clicking inside the check box as shown below:

Submit Requisition

Once the final review is complete, the next step is Submit Requisition or Assign Cart. Assign cart would be used when a specific person is to take action on the requisition.

After you submit the requisition and it is approved by all internal approvers, it becomes Purchase Order. A PO is a legally binding document. Once created, it is usually difficult to cancel an order. Requisitions should not be submitted unless the department is sure they want to order the goods or services.
TechBuy Workflow

The steps in workflow after submission 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
- Various departments review the workflow, select PR Approvals tab to view status
- All workflow on the Purchase Order side is automated, an encumbrance is created in Banner and order is automatically faxed or emailed to vendor
- Though not suggested it is possible for a department to request “Department Validation” so that one person can review all transactions. Email techbuy.purchasing@ttu.edu to discuss this.

Budget – the budget step reviews the available funds (FGIBAVL) in Banner. For accounts budgeted at the FOP, the available balance is verified. For accounts budgeted at the FOAP, the budget pool amount is verified.

FOAPAL Approval
- All orders will route to a Financial Manager, Approver or Requestor based upon the Banner Organization code(s) entered. Requisitions created by the Financial Manager and Approver are auto approved and do not require organizational approval. Requisitions created by the Requestor below the amount of $5,000 are auto approved and do not require organizational approval. Other approvals are required as needed. If multiple Org codes are used, then a valid approval is required for each Org code.

Vehicle – Any vehicle purchased must be approved by Fleet Management

SPAR (Sponsored Programs)
- SPAR Funds route to SPAR for all orders over $1000 (includes funds 21, 22, 23,12D, 12E, 25B and 25C.
- All ARRA funds (13D) route to SPAR regardless of dollar amount

Fixed Assets – Anything coded with budget pool 7J0, or account codes 7C0190, 7C0200, 7C0914 or 7C0916 will be reviewed by Property Inventory for proper coding and asset tagging

Environmental Health and Safety
- Radioactive Purchases, Hazardous Materials, Controlled Substances, Rad Minor, Toxins, and Select Agents will route to EH&S
- Certain chemicals having relevant CAS numbers will process through this workflow step in accordance with US Government rules on terrorism

Information Technology – IT purchase over $10,000 will route to the IT department. This may be based off of form category or vendor category.
**Research Services** – Federal Equipment submitted on one of the two Federal Equipment forms will route to Office of Research Services. Federal funds include all funds starting with 21

**Purchasing**
- Purchase Requisition over $5,000
- All State Funded Purchases (Funds starting with 11, 12, 13 and 14)
- All requisitions completed on a form route through Purchasing.
New Vendor Set Up

- All US vendors must have New Vendor forms completed.
- Foreign individuals will need a W8_BEN and a company, the W8_BEN_E if the vendor is requesting treaty exemption from taxes. Services with companies that are not corporations will need an ICQ. Research participants DO NOT need an ICQ form.
- You can contact Vendor Services office if you have questions on this vendor.services@ttu.edu.
- **The Vendor does not have to be set up to submit a requisition, but must be set up to complete the purchase order. Procurement Services can contact the vendor for required forms.**

To set up a new vendor - Use the Form that is appropriate to the purchase being made, and then follow the steps as follows:

1. In the window that opens, click on Supplier Search. Do this to ensure the supplier is not already active.
2. In the Supplier field, type in vendor name and click on Search:
3. Message below indicates the vendor is not active in TechBuy:
   - **There were no suppliers that matched the search criteria. Please revise the search criteria and try again.**
4. Now, complete the form and enter the vendor information manually. When the form opens, select the link “enter manually”.

![Image of Supplier Search](image-url)
Complete Vendor Information:

1. Enter Supplier name
2. Enter DUNS No. if available, not required.
3. Enter Supplier phone number
4. Enter fax number
5. Enter supplier
6. Enter Vendor contact name
7. Enter Vendor address
8. Enter Vendor City / State / Zip
9. Select HUB Status
10. Select Shipping Information

Complete the Purchase information as needed:
1. Select purchase category
2. Enter packaging information
3. Enter quantity
4. Enter Unit price
5. Provide product description – this will print on ledgers and checks
6. Provide further description if needed

To complete the transaction after the form is complete, select action desired from the drop down at the upper right corner of the window.

To access the forms that a new vendor needs to complete, from Raiderlink go to forms within the Procurement Services Channel. A department may ask that the vendor complete the forms and send them to the department. Upon receiving the forms, the department then forwards them to Procurement Services. This may speed up the process.

Adding comment after requisition becomes a PO

Once the requisition is approved, communication regarding it is encouraged to be documented within the comments section of TechBuy. It is at this point that email capability within the comments section is available to use. On the following page are instructions on how to make comments within a purchase order / receipt.

Within purchase order, select Add Comment from drop down in upper right or select comments tab. If comment tab is selected, in window that opens, choose Add Comment.

Within comment box, select those who are to receive emails of comment in top section. Add comments in the box provided. Attach documents as needed. Select “Add Comment” bar to complete. If submitting an invoice for payment, select Accounts Payable as email recipient and then attach the invoice in the Comments Section of the purchase order.
Select Add Comment after clicking comments tab

Select Comments tab
OR
Choose “Add Comment”