TechBuy 9.2 Update

Finance Systems Management
July 28, 2009
9.2 Enhancements

- Home Page Format
- Workflow Comments
- View Approvers and Workflow Detail
- Return Requisition
- History Search on Custom Field Values
- New Forms Page
- Print Form Documents
- Updates to Email Notifications
An online tutorial is available from Webraider under Purchasing > TechBuy Information > TechBuy Training Documentation > TechBuy 9.2 – New Search Features

http://www.fiscal.ttuhs.edu/captivate_training/TechBuy_Search_Update_demo/ TechBuy_Search_Update_demo.htm
TechBuy 9.2 Updates – Workflow Comments

You can add “Comments” to a Requisition at any point in the Review or Approval process. The comments will stay in “History” and can be accessed at any time.

To add a Comment to a Requisition, click on the “Comments” tab.
To add a Comment to a Requisition, click on “Add Comments”
Enter a comment that applies to this requisition and then click “Add Comment”.

You can also email the comment to another TechBuy User by selecting “add email recipient” and entering the desired recipient.
TechBuy 9.2 Updates – Workflow Comments

The Comments section stores all comments related to this requisition
Comments are also stored in the Requisition History Tab.
You can see the routing and approvers for requisitions and purchase orders from the “Approvals” tab.

To see approvers and routing for requisitions and purchase orders, click on the “Approvals” tab.
Each box represents a step in the approval workflow. You can see who has approved a step and the possible approvers in an uncompleted step.

To see approvers in an approval step, click on “View Approvers”.
All possible approvers are listed for this step in the approval workflow.
Return Requisition

• Approvers that have the ability to Reject Requisitions are able to Return Requisitions
• Requisitions can be returned at any point in the approval process
• When returned it becomes a “Draft Cart” again
• New tab added for “My returned Requisitions”
• Requisition can be modified by the Requisitioner and then resubmitted to the approval process
• Requisition number will remain the same as the original
• All previous approval information and comments are available in the History tab
TechBuy 9.2 Updates – Return Requisition: Approver

To view approval folders, click on “View Approvals”
To view requisitions that need your approval or need to be assigned to you, click on either folder.
To open the requisition, click the requisition number.
To add a comment or reason for return, click on “Comments” and add your comment or reason for return.
To return a requisition, select “Return to Requisitioner” then click “Go”
When a requisition is returned, the Requisitioner can see the requisition in the “Returned” folder.
To view the requisition click on the hyperlinked cart field.

A requisition can also be withdrawn at this point.
To view the comments or reason for return, click “Comments”
TechBuy 9.2 Updates – Return Requisition: Shopper

To add a comment, click “Add Comment”
Provide the requested information and click "Add Comment"
The Comments tab is a good way to pass information about a requisition and is viewable at any time.
TechBuy 9.2 Updates – Return Requisition: Shopper

After adding comments or making a requested change, "Submit Req" again. The requisition will follow the same approval workflow as before.

<table>
<thead>
<tr>
<th>Line No</th>
<th>Date/Time</th>
<th>User</th>
<th>Step(s)</th>
<th>Action</th>
<th>Field Name</th>
<th>From</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>7/20/2009</td>
<td>Cindy Approval</td>
<td>Banner PCARAL Chart H</td>
<td>Requisition returned</td>
<td>Cindy Approval</td>
<td>Cindy Approval</td>
</tr>
<tr>
<td>2</td>
<td>7/20/2009</td>
<td>Cindy Approval</td>
<td>4:57 PM</td>
<td>Comment Added</td>
<td>Cindy Approval</td>
<td>Cindy Shopper</td>
</tr>
<tr>
<td>3</td>
<td>7/20/2009</td>
<td>Cindy Approval</td>
<td>Banner PCARAL Chart H</td>
<td>Requisition assigned</td>
<td>Cindy Approval</td>
<td>Cindy Approval</td>
</tr>
<tr>
<td>4</td>
<td>7/20/2009</td>
<td>Cindy Approval</td>
<td>4:56 PM</td>
<td>Requisition submitted</td>
<td>Cindy Approval</td>
<td>Cindy Approval</td>
</tr>
<tr>
<td>5</td>
<td>7/20/2009</td>
<td>Cindy Approval</td>
<td>4:44 PM</td>
<td>Comment Added</td>
<td>Cindy Approval</td>
<td>Cindy Approval</td>
</tr>
<tr>
<td>6</td>
<td>7/20/2009</td>
<td>Cindy Shopper</td>
<td>New Line added - draft</td>
<td>July Services</td>
<td>Form</td>
<td>July Delivery Services</td>
</tr>
</tbody>
</table>

Comments are also stored in the History tab.
After submission by the Requisitioner, the requisition goes back to the original approver for approval.
The approver can review the requisition for changes.
The approver can review comments.
The approver can add comments.
Comments are stored in the requisition history along with all other information.
TechBuy 9.2 Updates – History Search Custom Fields

To search History by a custom field check the “Filter” box.
TechBuy 9.2 Updates – History Search Custom Fields

Select a date range

To search History by Banner COA elements, you must select the Chart of Accounts first by clicking on "Select from all values"

After the COA is selected, you may "Select from all values" for any field
Enter a value or description and click “Search”
TechBuy 9.2 Updates – History Search Custom Fields

Select the result you wish to query

<table>
<thead>
<tr>
<th>Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>181183-H</td>
<td>Purchasing</td>
</tr>
</tbody>
</table>
After the results return to the search page, click “Search”
TechBuy 9.2 Updates – History Search Custom Fields

View PO by clicking on the PO Number
TechBuy 9.2 Updates – New Forms Page

Access Forms from Menu Bar
TechBuy 9.2 Updates – New Forms Page

Click on “+” beside Organization Forms
Click on HSC Forms
To bring up the desired, form either click on the Form name or the “View Form” button to the right of the form name.
After completion you can print any form by clicking on the Print Icon.
Updates to eMail Notifications

• Link to SciQuest Removed from Email Notifications
• Link to TechBuy Included
• Cart Name and Requisition Name included in “PO Sent to Supplier” Notification
• HSC Contact Information Included
Contacts

purchasing@ttuhsc.edu
fsm@ttuhsc.edu
Questions?