Texas Tech University Health Sciences Center

Finance and Administration
Purchasing

TechBuy Training
SciQuest Powered eProcurement
TechBuy

(A SciQuest Powered eProcurement Platform)

TechBuy, a shopping and purchasing mechanism, was jointly purchased by Texas Tech University Health Sciences Center, Texas Tech University and Texas Tech University System. TechBuy replaced our old eRQ and ePO. It was fully implemented in September 2008.


Authorized HSC shoppers can sign in to TechBuy where they can do self-service comparison and purchasing from a selection of contracted suppliers. Shopping carts can be created by shoppers and submitted to requesters where the departmental requester or approver will apply account and budget information. Unless additional approvals are needed, the TechBuy Order Manager will submit the purchase order to the supplier electronically. A daily expense transaction will upload to departmental accounts within a day or two of the charge. Spend data held within TechBuy will provide departments and administrators with detailed data for spend analysis.

- Sample of Vendors available:
  - Bio Rad
  - Cardinal Health (Clinical Supplies only)
  - CDWG
  - Fisher
  - GovConnections
  - Granger
  - Invitrogen
  - MSC
  - Perkin Elmer
  - SHI
  - Sigma Aldrich
  - Staples
  - VWR

Procedural Changes

- Single sign on – exceptions – ex: Cardinal (Pharmaceuticals only)
- A daily payment upload will occur – so charges will hit the departmental accounts within a day or two of the date of the charge.
- Department administrators can view transactions for the entire department from the TechBuy site as frequently as desired. This will help department administrators / account managers monitor the purchases made by individuals.
• Each User in TechBuy has the ability to maintain their own profiles, including the ability to select which email notifications they want to receive. (Ex: order acknowledgment, order ship, backorder notifications, etc)
• Banner FOAPs do not have to be maintained in individual profiles – users will be able to select the account from a list of VALID accounts. A daily process will run to pull accounts that have been inactivated or grants that have ended.
• Orders in TechBuy can be split between accounts.

**TechBuy Roles**

**Shopper – Assign Cart Only**
- Search from vendor catalogs
- Shop and add items to cart
- Assign cart for application of accounting information

**Shopper**
- Search from vendor catalogs
- Shop and add items to cart
- Apply accounting information
- Submit for departmental approval

**Requester**
- Search from vendor catalogs
- Shop and add items to cart
- Apply accounting information
- Approve, reject or edit a requisition submitted by an assigned shopper up to $5000
- Orders under $5000 will be submitted to the vendor for processing unless the item(s) ordered require additional approvals (Safety Services (EH&S), Sponsored Programs or IT)

**Departmental Approver**
- Approve, reject, or edit a requisition greater than $5000 forwarded by Workflow
- An approver who is established by signature authority is also automatically set up as a requester

**Workflows**

**Safety Services**
- All radioactive chemical orders will automatically be forwarded to Safety Services regardless of the dollar amount.
• Requisitions will route to Safety Services at Amarillo, El Paso or Lubbock based to Ship To Address (Orders will all other Ship To Addresses will default to Lubbock)

Sponsored Programs
• All requisitions on federal grants where the order total is above $4,999.99 will be forwarded to Sponsored Programs. (The system does not have a way to identify a capital asset, so it must use the dollar amount to determine Sponsored Program routing)

Information Technology
• For HSC funds all orders above $49,999.99 will be routed to HSC IT for approval

Purchasing
• Any line item level orders greater than $499.99
• Any order total greater than $4,999.99
  o Both above approval levels are set up to provide purchasing the ability to make sure that controlled and capital asset coding is applied correctly.

If you submit a requisition against TTU or TTUS accounts the requisition will route through TTU Workflow as well as HSC.

Definitions

Cart
• A virtual shopping cart which holds items selected for purchase. A shopping cart can hold items from several vendors. When the cart is submitted and approved separate purchase orders are created for each vendor.

Catalog Types
• **Punch-out**
  o A link in TechBuy that takes you out of TechBuy to shop on the vendor’s website.
  o Navigation is different in each vendor’s website depending on their set up
  o When a shopping cart is finalized in the punch-out site the cart is returned to TechBuy to finalize the transaction and route for approvals
  o Pricing is updated as frequently as each particular vendor contract stipulates
• **Hosted**
  o TechBuy receives a catalog file. All item information and pricing is within the TechBuy site
  o Product searches are performed on the TechBuy site
  o Navigation does not vary between hosted vendors
Pricing updates are scheduled by contract or agreement with the vendor updated in the site after approval by HSC purchasing. The price at the time the order was placed will prevail.

- **Science**
  - TechBuy has approximately 382 cataloged vendors in the Science catalog. HSC purchasing will work with researchers to activate each catalog as necessary.
  - To establish contract pricing a science vendor must be a hosted or punch-out catalog. If we do not establish contract pricing with a science catalog vendor that has been enabled, then the pricing will be nationwide institutional pricing.
  - The Science catalog can be used as a sourcing tool within TechBuy to do product searches.

**Fulfillment Center**
- Defined to direct a requisition to the correct payment center and ghost card (Institutional Credit Card)
  - HSC
  - TTU
- Default based on requisitioner’s home department. Can be edited.

**Ghost Card**
- Institutional Credit Card
- Most Punch Out vendors in Phase I have a ghost card tied to their vendor account
- HSC will IV departments the amounts charged for each purchase order

**Requisition**
- A requisition is a request to order and is created when a cart is submitted and then routed through the approval process.

**Purchase Order**
- A purchase order is created when a requisition is submitted to a vendor. A shopping cart (Requisition) may contain items from several different vendors. After a requisition is approved, a purchase order is created for each vendor.

**“Ship To” Code**
- Required field in a requisition
- Determines where ordered items will be delivered
- Ship To Logic:
  - First Character = Entity (H)
  - Second and Third Characters = City (AM = Amarillo, L = Lubbock, E = El Paso, O = Odessa, etc)
  - Last Three Characters = Sequential number

# Contact Information

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