The Shopper & Requester Role

The shopper role is authorized to shop but has no approval capabilities and all transactions created by the shopper role require approval from a requester or approver. The requester role has limited authorization and can shop and approve orders for under $5,000.

The approval process is automated through a process called Workflow. The following documentation will walk you through the process from adding items to your cart to submitting a requisition for approval. If the requester is not shopping but simply filling the role as an approver for purchases less than $5,000, please refer to the Approver documentation.

Adding Items to a Cart

TechBUY offers the capability to shop by hosted catalogs, non-catalog forms and punch-out to vendors’ websites. This section will describe how to add items to your cart by using both hosted and punch-out suppliers. Please see the documentation for Forms for additional information related to non-catalog purchases.

It is important to note that a supplier cannot be a hosted catalog and a punch-out catalog.

Hosted Catalogs:

Hosted catalogs are essentially a supplier’s catalog that contains TTUHSC contract pricing but usually contains a smaller number of products than a supplier’s catalog. If you use the search capabilities within TechBUY, you are searching the hosted catalogs. There are many search capabilities within TechBUY. The below section will walk you through several different search methods.

Performing a Standard Search - Select the Product Search tab from the Home screen to access the search capabilities. By default, the standard search displays the first time Product Search is opened.
Enter the keyword or keywords you are searching for in the **Enter Search Terms** text box. Keep in mind the more information you enter, the more specific your search will be. Using this standard search by keyword, searches all categories. Category specific searches are described later in this section.

Select the **Include Similar Terms** box to allow for misspellings and similar words in the search results.

When you have entered all search criteria, select the **Search** icon.

If the search results do not provide the information you need, perform an advanced search or refine your search criteria.

**Performing a Search by Vertical** - A vertical search filters search results to a specific product category. This type of search should only be used if a specific product category is known.

The available verticals (product categories) are dependent on enabled suppliers. For example, if there are no loaded hosted categories for the furniture category, furniture will not be an available in a vertical search. As hosted catalogs are added, you may see additional vertical categories.
If a product vertical search consists only of punch-out vendors, the search field interface will not be available; however, the punch-out icons will be displayed.

Access the **Product Search** tab from the **Home** screen. You should see one or more verticals displayed on the left of the screen in the **Categories** section.

Select the **More**... icon to see additional verticals.
Notice there are now several additional verticals listed under **Categories**.

Select the vertical containing the product of interest. The selected vertical is now highlighted.

Enter keywords in the **Search Criteria** fields to find the desired item.
Select the **Include Similar Terms** box to allow for misspellings and similar words in the search results, then select **Search** to display search results.

To perform the same search using a different vertical, simply select the new vertical. The values entered in the search criteria are preserved between verticals.

**TechBUY** remembers the last vertical selected in a search and will set this vertical as the default for your next search. It is important to pay attention to which vertical is selected during a search.

**Add Hosted Catalog items to Cart:**

Once you have searched and located the items you would like to add to your cart, select the box(s) to the right of the item(s) you wish to add.

Select **Add to Active Cart** and select **Go**. The shopping cart total at the top right-hand corner of the screen will now be updated with the additional items.

Continue adding hosted catalog or punch-out vendor items to your cart. When you have completed adding products, refer to the **Editing the Cart** section of this chapter.

**Punch-out Vendors:**

Many suppliers are loaded into **TechBUY** as punch-out vendors. When shopping from punch-out vendors, you will actually be redirected to their website. The user is
automatically authenticated to the supplier, so the supplier’s website knows which organization the user is from to show the appropriate products and pricing. After shopping from the supplier’s website, the items will be pulled into a TechBUY requisition for completion within TechBUY.

Punch-out vendors are shown with icons (typically company logos) at the bottom of the search interface for each category on the Home tab and the Product Search sub-tab. If you are under the All category, you will see all punch-out vendors by category.

It is important to note that the functionality and usability of punch-out shopping varies between suppliers. The below instructions will walk you through the TechBUY side of punch-out shopping. It will not instruct you on shopping each supplier’s website.

To shop from a punch-out vendor, select a Punch-out Vendor icon. The browser will redirect you to the supplier’s website. The supplier’s website will be framed within TechBUY.

At any point in the punch-out experience, you can cancel by selecting the Cancel Punch-out icon at the top of the screen.
Once you access the supplier’s website, use the available resources within the site to find the desired products. Once you have added all products, check out of the punch-out site. An order is **NOT** being placed with the supplier when checking out of their punch-out site. The purchasing process continues once returned to **TechBUY**. The products in your punch-out shopping cart are returned to the **TechBUY** shopping cart.

You can continue to add products to your **TechBUY** shopping cart from other punch-out vendors as well as hosted catalog items.

Once your cart is complete, refer to the **Editing a Cart** section below.

**Editing a Cart**

You can edit a cart by navigating to your cart (**Cart** tab and **Active Cart** sub-tab) and by selecting the **Edit Cart** process from the workflow diagram. From the **Edit Cart** menu, you can remove items or move items to a different cart.
Removing Items from the Cart:

Items can be removed from shopping carts either individually or all at once. You can remove any item from a cart regardless if the item is a punch-out item, hosted catalog item, non-catalog item etc.

To remove line items, place a check in the Select checkbox in the row for each item you wish to remove.

Once you have marked all the items you wish to remove, select Remove Selected Items in the Action Dropdown list and click the Go button.

To remove all items, you simply select Remove All Items in the Action Dropdown list and click the Go button.

Notice that the system removed the selected item(s) and updated the cart button totals in the upper right corner of the screen.
Favorites:

TechBUY allows a user to keep a list of items that are frequently purchased in a folder titled Favorites. This allows a shopper or requester to add items to a cart directly from this folder as opposed to searching for it in hosted catalogs or on punch-out vendor websites. However, our SciQuest representatives have warned against adding items to a cart via the favorites' folder. Both hosted catalogs and punch-out vendor websites contain contract pricing that is updated regularly. Unfortunately, items stored in your Favorites' folder are not currently subject to the same updates. This will cause requisitions containing items that were not updated to error in the suppliers system and may create a delay in processing. TTUHSC is currently advising all TechBUY users to NOT utilize the Favorites feature. SciQuest is aware of the issue and currently working on a process to update the Favorites folder. We will notify you when the Favorites feature can be utilized.

Move Items to a Different Cart:

You may have items in your active cart that you would like to purchase but would rather have them on a separate cart. For example, if you are purchasing a large dollar value
If an item that requires additional approval, you may want to put your office supplies in a different cart to keep them from being held up in the approval process as well.

To move an item from one cart to another, select the checkbox next to the item(s) you wish to move.

Select the Move to Another Cart option from the Action dropdown list and click on the Go button.

This will open a Move Lines pop-up window and ask you to select the cart you wish to move the items into. Use the Select a Cart dropdown list to select the appropriate cart.

Select Move to a New Cart and select the Move icon at the bottom of the window.

The item you selected will be moved to a draft cart labeled with the current date. Your current Active Cart will now be updated with the change. You can access and complete either your active cart or your draft cart.

Copy a Previous Requisition to a New Cart:

TechBUY has a Copy to New Cart feature that may be utilized in several different scenarios. For example, if a requisition was rejected and you need to submit a new requisition with the same items, you will want to flip it to a new cart.

To access this feature, access the original requisition from the PR History search options. For more information and instructions, please refer to the PR History section in the History chapter.

The original requisition is now open for view.
Select **Copy to New Cart** from the **Available Actions** dropdown.

All items listed in the original requisition will now be added to a new cart. Refer to the **Shopper** chapter for information on editing, reviewing, and submitting the requisition.

**Reviewing a Cart**

Once you have the items you wish to add to your requisition in the active cart, you are ready to place the items in a requisition form for review. During the requisition review, you can correct shipping and billing addresses, review the fulfillment address, title your requisition, add accounting information and / or add external and internal notes.

To access the requisition review, select the **Carts** tab, **Active Cart** sub-tab, and **Review** process from the **Workflow** diagram. Notice how the requisition header contains a General, Shipping, and Billing section.
Reviewing the General Header Information:

To review and edit the General header information, select the red Edit box in the upper right-hand corner of the General information block.

This will open an additional window titled General that will allow you to edit the information. From the additional window, you can rename the cart, add a description, change the priority, or add the Principle Investigator information.
These fields are not required fields. However, the Principle Investigator field is **required** for Grant purchases and will be rejected in the approval process if unpopulated. If your purchase will not use Grant Funds, you do not need to populate this field.

When you have edited the General information, select the Save icon.

**Reviewing the Shipping Header Information:**

To review and edit the Shipping header information, select the red Edit box in the upper right-hand corner of the Shipping information block. This will open an additional window titled Shipping that will allow you to edit the information.

The Shipping Address dropdown box is populated from your user profile. Select the arrow on the dropdown box to select the appropriate ship to address. Adding default address(es) to your profile is the most efficient way to populate shipping information. For more information on adding default ship to codes, please refer to the Managing Your Profile chapter.
If you need to select a shipping address that is not loaded into your profile, you can select the From Org Addresses option located under the Shipping Address dropdown box.

This will open an Address Search window. You can enter search criteria or simply select the Search icon to bring in all shipping addresses. When entering search criteria, you can enter the first characters of the Ship To Code or use a % or * wildcard and enter the last characters of the Ship To Code.

If you cannot locate the correct shipping address from the TechBUY list, please contact the Purchasing Department at HSC.

Example 1: Search using no criteria
Using no criteria in the search produced a list of all Ship To codes listed in alphabetical order.

**Example 2: Search using HLU as the criteria in the Ship To Code**

Simply using HLU for the Ship To Code criteria searched for all addresses that start with HLU.
Example 3: Search using either a % or * wildcard (*001 or %001)

<table>
<thead>
<tr>
<th>Name</th>
<th>Address</th>
</tr>
</thead>
</table>
| HA6001 | Contact Name Denise Sober  
Phone: 480 (713) 1888 ext.224  
Email: denise.sober@ttuhsc.edu  
TX Tech Univ HSC  
12071 FM 3522  
Rm/Bldg  
Abilene, TX 79601  
United States |
| HAM001 | Contact Name Denise Sober  
Phone: 480 (713) 1888 ext.224  
Email: denise.sober@ttuhsc.edu  
TX Tech Univ HSC  
1501 S CoLTER/POISON CONT CTR  
Rm/Bldg  
Amarillo, TX 79106  
United States |
| HAI001 | Contact Name Denise Sober  
Phone: 480 (713) 1396 ext.224  
Email: denise.sober@ttuhsc.edu  
TX Tech Univ HSC  
801 R MAIN  
Rm/Bldg  
ANGELA, TX 79714  
United States |
| HAF001 | Contact Name Denise Sober  
Phone: 480 (713) 1396 ext.224  
Email: denise.sober@ttuhsc.edu  
7055 S US 277  
BRONTE, TX 76933  
United States |

Notice how the search results using a %001 or *001 returned anything that ended in 001.

Once you have identified the shipping address needed for the requisition, click on the **Select** icon to the right of the address.

This will change the address information in the **Ship To** window.
Verify and correct the **Contact Name**, **Phone**, and **Email** information if necessary. This information is derived from your user profile. If the information is incorrect, it is advised to update your user profile. For additional information, refer to the **Managing Your Profile** chapter.

The **Rm/Building** field is required. Please populate this field with your room number, building name, or mail stop number. This information can be defaulted from your user profile as well.

The **On Save** option allows you to select the **Add to Profile As** box to add the selected shipping address to your profile with a given nickname. Simply click in the box to the left of the **Add to Profile As** option and enter a nickname or leave the **Ship To** code for future reference. By selecting this option, the next time you access the **Ship To** window from your requisition, you will have this address added to your dropdown list.

Once you have completed the **Ship To** window, select the **Save** icon.

**Note:** If you have a message at the top of your requisition stating that your address is incomplete, you either need to select a **Ship To** code or need to populate the **Rm/Building** field in the **Ship To** header information.

**Reviewing the Billing Header Information:**

The billing addresses are either TTUHSC Payables or TTU Payables. This address will be defaulted for you at the time of registration based upon your department. Verify that the **Bill To** address corresponds to the correct paying entity. If you need to correct the billing information, select the red **Edit** box in the upper right-hand corner of the **Billing** information block.
To edit the billing information, select the correct entity from the From Org Addresses dropdown list.

When the Bill To information is correct, select the Save icon.

Review the Billing Options and enter the Accounting Date by selecting Edit from the Billing Options.

Please enter the accounting date. It should be entered as the current date for current FY purchases.

Please select the Save icon.

TTUHSC Finance Systems Management
Entering Accounting Codes:

One of the most important aspects of the Shopper role is adding the Accounting Codes.

You can add accounting information to the header or to each line item. Accounting at the header level will apply to the entire document as opposed to line item accounting. You can have both header level and line item level accounting on one document. If both exist on the document, the line item accounting will override the header accounting information. If however, the line item does not have accounting information, the accounting information at the header level will be applied.

Header Level Accounting Codes:

To add accounting codes at the header level, select the Edit icon in the top right of the Non-Catalog Banner FOPAL Funding Information FY '09 block.

The following instructions show you how to add accounting information to a requisition if you have not added the accounting information to your profile. If you have added accounting information to your profile you will have an option that says “Select from profile values…”. This will show you a list of all values you added to your profile.

Click on the “Select from all values” hyperlink under the Chart field. If you have added account codes to your profile, you will have an additional option to “Select from profile values…” and select your value from a drop-down list.
Select “H – Texas Tech Univ. Health Sciences…”

Click on the “Select from all values” hyperlink under the **Fund** field and enter your Banner fund. If you have added account codes to your profile, you will have an additional option to “Select from profile values…” and select your value from a dropdown list.

Click on the “Search” button.
Select the proper Fund by clicking on the “Select” button.

Click on the “Select from all values” hyperlink under the **Organization** field and enter your Banner orgn. If you have added account codes to your profile, you will have an additional option to “Select from profile values…” and select your value from a drop-down list.

Click on the “Search” button.

Select the proper Organization by clicking on the “Select” button.
Click on the “Select from all values” hyperlink under the **Account** field and enter the correct Banner expense account or enter a description to search for. (See the “Banner Account Code Prefix Descriptions” at the end of the TechBUY Phase II Overview document)

![Custom Field Search](image)

Click on the “Search” button.

![Click to filter search results](image)

Select the proper Banner expense account by clicking on the “Select” button.

![Funding Information FY09](image)

Click on the “Select from all values” hyperlink under the **Program** field and enter the correct Banner program code or enter a description to search for. If you have added account codes to your profile, you will have an additional option to “Select from profile values…” and select your value from a drop-down list.
Click on the correct Program code for your Banner Fund and Org.

To Split Header Level Accounting information, select the Add Split icon on the top right-hand corner of the Accounting Codes window.

This will add additional FOAP fields.

Split accounting at the header level only allows you to split by a % of the Price or of the Quantity. If you would like to split by specific dollar amount, you will have to add a line item level split.

Select either % of Price or % of Quantity from the dropdown box on the top right corner of the screen.

Enter the percentage you would like applied to each FOAP in the box to the right of the Program. The total of all accounting string percentages must equal 100.

Select “Save” when you have entered each chart value.

Line Level Accounting Codes:

To add accounting information at the line level, click on “View/edit by line item…” at the lower right corner of the Non-Catalog Banner FOAPAL Funding Information FY ’09 box.
To edit the Funding Information for a line item, click on the “edit’ button on the right side of each line item box.

To change any value in the Funding Information box, click on “Select from all values…” below the field of information you need to change. If you have added account codes to your profile, you will have an additional option to “Select from profile values…” and select your value from a drop-down list. You can change any of the fields.
Enter a description or an Account Code Prefix to search for the correct Account Code (See the “Banner Account Code Prefix Descriptions” at the end of the TechBUY Phase II Overview document)

Select the Account code you should use by clicking on the corresponding “select” button.

By selecting the Add Split option in the top right-hand corner of the Funding Information window, you can split fund each item based on % of Price, % of Quantity, Amount of Price, and Amount of Quantity.

Click on the “Save” button to save your changes.

Review your changes. See that the item you changed the Funding information on says “Funding Information FY09 values differ from header”.

TTUHSC Finance Systems Management
### TTUHSC Finance Systems Management

#### Supplier / Line Item Details

<table>
<thead>
<tr>
<th>Product Description</th>
<th>Catalog No</th>
<th>Size / Packaging</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Ext. Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specialized software for lab analysis</td>
<td>1/EA</td>
<td></td>
<td>6,610.00</td>
<td>4 EA</td>
<td>26,440.00</td>
</tr>
<tr>
<td>Specialized Paper for printing results of testing</td>
<td>1/EA</td>
<td></td>
<td>176.80</td>
<td>1 EA</td>
<td>176.80</td>
</tr>
</tbody>
</table>

**Supplier subtotal:** 28,016.80

---

### Supplier / Line Item Details

1. **PC Network Inc.**
   - Purchase Order: [Insert Purchase Order Number]
   - Address: [Insert Address]
   - Contact: [Insert Contact Information]

   **Product Description:**
   - Specialized software for lab analysis
   - Specialized Paper for printing results of testing

   **Total:** 28,016.80

   **Supplier subtotal:** 28,016.80

---

### Tax Details

- Sales tax rate: [Insert Sales Tax Rate]
- Property tax rate: [Insert Property Tax Rate]
- Total tax: [Insert Total Tax]
- Total with tax: [Insert Total with Tax]
Creating External Notes and Attachments:

Adding external notes or attachments to a requisition allows you to send information to the vendor. You can attach external notes or attachments at the header level, which would apply to the entire requisition, or at the line item level. However, most vendors are currently incapable of receiving this information electronically. We are currently advising all shoppers, requestors, and approvers from entering or attaching any external notes. Doing so could cause the order to be delayed in the vendor’s system.

Creating Internal Notes:

Internal notes allow users to add detailed notes or information to the requisition that is available to shoppers, requestors, and approvers as the requisition flows through the workflow process. These notes are not sent to the supplier. Internal notes can be added at the header level of the requisition or to each individual line item.

Internal Header Notes: Internal notes entered at the header level are intended to apply to the entire requisition. To add an internal note to the header, select the Edit icon at the top right-hand corner of the Internal Notes and Attachments header section.

This will open an additional window titled Internal Note. Enter the information you wish to be attached to the requisition in the text box. If you need additional space, select the Expand button. When you have completed the note, select the Save icon.
Once you save your note, the additional window will close. You will notice the Internal Notes and Attachments header information will now be updated with your note.

**Internal Line Item Notes:** Internal line item notes are similar to internal header notes except that they contain information specifically relating to a particular item in the requisition. To enter a line item note, select the Edit icon to the right of the item in the requisition.
This will open an additional window titled **Edit Line**. Enter your information in the **Internal Note** text box. When you have completed your note, select the **Save** icon.

The **Edit Line** window will close and your line item note will now be populated in the requisition.
Adding Internal Attachments:

Items greater than $5,000 purchased using federal grant funds require that the **Federal Equipment Purchase Approval Request** form be filled out and attached to the line item of the document. You can access the form at [http://www.fiscal.ttuhsc.edu/purchasing/](http://www.fiscal.ttuhsc.edu/purchasing/). Each item purchased using a federal grant fund greater than $5,000 requires an attachment of the **Federal Equipment Purchase Approval Request** at the line level. If the attachment is not added to the line level, the item will be rejected during the approval process.

Click on the title of the document and save it on your computer. Once you fill out the information on the form, you are ready to attach it to the document. Save the information and close the document.

To enter a line item attachment, select the **Add Attachment** icon to the right of the item in the requisition.

This will open an additional window titled **Internal Attachment**.

Select the **Browse** icon. This will open your My Documents folder. Select the **Federal Equipment Purchase Approval Request** form that applies to the item on the requisition.
Select the **Save** icon. The file will now be listed under **Internal Attachments** at the line level.

If you need to remove the attachment, select the **Remove** icon to the right of the attachment.

**Reviewing the Fulfillment Address:**

Under each vendor name in the body of the requisition is a **Fulfillment Address**. This fulfillment address tells the vendor to charge either the TTU ghost card or the HSC ghost card (for Punch-out vendors). It is **important** to verify that the Fulfillment Address is set to **HSC** for **EACH** Punch-out vendor in the requisition.

If the fulfillment address is incorrect, select the **Edit** icon to the right of the current fulfillment address.

This will open the **Change Fulfillment Address** window. Use the dropdown box to select the **HSC** address. Select the **Save** icon when you have the appropriate fulfillment address populated.
Scan the requisition to verify that each vendor on the requisition is tied to an HSC Fulfillment Address.

Recurring Payments and Advanced Pay:

To set up an order as a Recurring Payment or an Advance Pay you must “Edit” at the line item level.

Click “edit” to open options for Recurring or Advance Pay
Enter commodity code if applicable, check either the “Recurring Payment” or Advanced Pay box and supply additional details in the “Internal Notes” section. Be sure to “Save” your choices.

**PR Approvals**

The **PR Approvals** option allows you to see the workflow processes your requisition will flow through. The number of workflow steps will be dependent on many factors including total amount of requisition, items purchased, and departmental policies.

To view the workflow steps required for a specific requisition, select **PR Approvals** from either the workflow diagram or from the tabs listed under **Active Cart**.
A workflow diagram will visually display each step the requisition will take before producing a Purchase Order. The symbols within the steps will notify you if there is an error or where the requisition is within the workflow.

PO Preview

Once a requisition flows through the entire workflow process and receives the proper approvals, a PO is automatically created and sent to the vendor electronically. Because a cart and a requisition can contain multiple vendors, one requisition may create multiple Purchase Orders. The PO Preview allows you to see what information will be sent to the vendors.

To access the PO Preview, select PO Preview from the workflow diagram or from the tabs under Active Cart.
A preview of each purchase order by vendor will display.

**Preview PO 1**

<table>
<thead>
<tr>
<th>Product Description</th>
<th>Catalog No</th>
<th>Size / Packaging</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Ext. Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thermal Pointer Tape White Roll, Fisherbrand, 1/EA</td>
<td>09313131</td>
<td>1/EA</td>
<td>138.04</td>
<td>1</td>
<td>138.04</td>
</tr>
<tr>
<td>Thermal Printer Tape, Fisherbrand, 2000/CS</td>
<td>09313132</td>
<td>2000/CS</td>
<td>226.77</td>
<td>1</td>
<td>226.77</td>
</tr>
<tr>
<td>Labeling Ink Roll Replacement for Handheld Label System CS-2, Fisherbrand, 1/EA</td>
<td>118050</td>
<td>1/EA</td>
<td>14.24</td>
<td>1</td>
<td>14.24</td>
</tr>
</tbody>
</table>

**PO Subtotal**

$373.18 USD

**Preview PO 2**

<table>
<thead>
<tr>
<th>Product Description</th>
<th>Catalog No</th>
<th>Size / Packaging</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Ext. Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Rod, Height 1 1/2 in, Width 12 in, Depth 1/2 in, Material PVC/Vinyl, For Use In Indoors, Package Quantity 12</td>
<td>1NXX9</td>
<td>EA</td>
<td>54.95</td>
<td>1</td>
<td>54.95</td>
</tr>
<tr>
<td>Display Rod, Height 1 1/2 in, Width 18 in, Depth 1/2 in, Material PVC/Vinyl, For Use In Indoors, Package Quantity 6</td>
<td>1NXXP1</td>
<td>EA</td>
<td>34.65</td>
<td>1</td>
<td>34.65</td>
</tr>
</tbody>
</table>

**PO Subtotal**

$88.60 USD

**Preview PO 3**

<table>
<thead>
<tr>
<th>Product Description</th>
<th>Catalog No</th>
<th>Size / Packaging</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Ext. Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avery White Laser Address Labels, 1&quot; x 2 5/8&quot;, 30 Labels Per Sheet, 3,000/Box</td>
<td>200882</td>
<td>BX</td>
<td>20.40</td>
<td>1</td>
<td>20.40</td>
</tr>
</tbody>
</table>

**PO Subtotal**

$20.40 USD
Submit the Requisition

Once you have edited, reviewed, and completed your requisition, you are ready to submit it to workflow approvals. Simply select **Submit Req** from the workflow diagram. You will receive a message that your requisition has been submitted.

Congratulations - You have successfully submitted a requisition!