TEXAS TECH UNIVERSITY HEALTH SCIENCES CENTER

Finance Systems Management

Financial Managers and Approvers have the responsibility to review and approve TechBuy orders. The only orders a Financial Manager or Approver will not have to approve are punch-out orders submitted by a requester or an Approver.

There are two ways in the approval process to take action on a requisition:

- TechBuy application
- Email Approvals

This document will go through the steps of reviewing, approving and rejecting requisitions in the TechBuy application and the Email Approval.

### Accessing the Requisitions Requiring Your Approval

There are three ways to access a requisition requiring your approval.

1. Email Approval: If a document is awaiting your approval, you will be notified by email. Users must have the proper email notifications set up in their profile to receive email notifications for email approval. For additional information, refer to the Email Approvals section at the end of this document.

| TEXAS                  | TECH UNIVERSITY  |
|------------------------|--|
| HEALT                  | H SCIENCES CENTER.   |
| HSC Buye               | r 9 Non-Catalog Form-CFY Approval Request for  |
| Requisitio             | on# 135750241  |
| Dear Thi Bui,          |  |
| The requisition lister | d below has been submitted for your approval.  |
| WARNING: Your app      | proval code is not set up in your profile, so you are not allowed to take action on this     |
| requisition via emai   | I. Action must be taken in your organization's site. You may log into the application to set |
| the approval code ir   | a your user profile.   |
| Summary                |  |
| Folder:                | HSC Buyer 9 Non-Catalog Form-CFY   |
| Prepared by:           | Thi Bui  |
| Cart Name:             | 2020-09-10 SBM388 01   |
| Requisition No.:       | 135750241  |
| Priority:              | Normal   |
| No. of line items:     | 1  |
| TOTAL:                 | 1.00 USD   |

2. TechBuy Application: To access requisitions that need review and approval, reference the Action Items Flag located in the upper right hand corner and then click **Requisitions to Approve**.

| <b>^</b> | TEXAS TECH UNIVERSITY<br>HEALTH SCIENCES CENTER. |                    |   | All 🔻            | Search (Alt+Q)    | ۹ | 21.06 USD 📜 | ∽ ┍╴ ┛   | <b>▲ 1</b>     |
|----------|--|--------------------|---|------------------|-------------------|---|-------------|----------|----------------|
|          | Approvals  |                    |   | Action           | n Items           |   |             | First    | t <del>•</del> |
| 6        | Requisitions Purchase Order                      | Change Requests    |   | My As<br>Requisi | ssigned Approvals |   | Solo        | ot Actic |                |
| <b>2</b> | Your Selections                                  | Click Requisitions | - |                  |                   |   | lter        | ns Flag  | 1              |
| â        | Date Range                                       | To Approve         |   |                  |                   |   |             |          |                |

3. TechBuy Application: The final way to access the documents that require your approval is to select **Approvals** and **Requisitions to Approve**.

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| Ξ  | Shop + Shopping + Shopping Home + S<br>Shopping Home Pag | ihopping Home Page   |                 |                |  |  |                               |                              |                             | C logest |
| 6  | Orders   | Quick search Q   | Select <b>F</b> | equis          | sitions                                    |  |                               |                              |                             |          |
| 8  | Search<br>My Orders                                      | Requisitions to Approve<br>Purchase Orders to Approve                            | to A            | Approv         | ve   | nission for<br>e and trac<br>Purchasir | k contract doo                | erlink)<br>urments<br>at you | not directly<br>submit your |          |
| Â  | Approvals  | Requisitions Recently Approved By Me<br>Purchase Orders Recently Approved By 910 | ited within the |                | nacana ana ana ana ang ang ang ang ang ang | ove contrac                            | t application li              | nic.                         | ,                           |          |
| 46 |  | Soloot Approvale   | iquest emails   | nformation abo | sut the TTUHSC Gro<br>may mean bidding     | up Contract<br>work has alr            | Purchasing S<br>ready been do | trategy.<br>ne for y         | Choosing a<br>ou! Click on  |          |
| ₿. |  | Select Approvals   | Steps to        | Requesting a   | Solicitation (e.g. Bid                     | , RFP, RFI) (                          | act database<br>descriink)    |                              |                             |          |

The Approvals will open in the My Approvals page.

|            | TEXAS TECH UNIVERSITY<br>HEALTH SCIENCES CENTER.                         |                     |                               |                   | All  Search (Alt+C   | i) Q          | 0.00 USD 👻 🗢 🛇 | P 🔹 🖬          |
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| 1          | Approvals  | View Appr           | ovals                         |                   |                      |               | Submit Date    | Newest First 👻 |
| 1          | Requisitions Purchase Order Change Rec                                   |                     | ng Events                     |                   |                      |               |                |                |
| 0          | Your Selections  | Total Results 1     | r folder 👻                    |                   |                      |               |                |                |
| *          | Date Range   | ✓ MY PR APPROVALS 1 |                               |                   |                      |               |                |                |
|            | All Dates 🗸  | REQUISITION NO.     | SUPPLIERS                     | ASSIGNED APPROVER | PR DATE/TIME         | REQUISITIONER | AMOUNT         |                |
|            | View Approvals For   | 3374933             | ABC Tent and Party Rental Inc | Thi Bul           | 10/26/2021 10:07 AM  | Thi Bui       | 1.00 USD       | @ Ľ ✓          |
| <b>%</b>   | My Approvals   | Requisition Name    | 2021-10-26 SBM388 01          | Folders           | 0 Days in folder [My | PR Approvals] |                |                |
| ₽          | Assigned Approver + Thi Bul $\times$                                     | No. of line items   | 1                             |                   |                      |               |                |                |
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| <b>6</b> 7 | Filters  |                     |                               |                   |                      |               |                |                |
| 8          | ^ FOLDERS  |                     |                               |                   |                      |               |                |                |
|            | My PR Approvals 1  |                     |                               |                   |                      |               |                |                |
|            | ^ BUSINESS UNIT  |                     |                               |                   |                      |               |                |                |
|            | Texas Tech University Health Sciences Center<br>(Health Sciences Center) |                     |                               |                   |                      |               |                |                |

#### **My Approvals**

Approval activity in the TechBuy application is done from the My Approvals page. From this page you can access and approve all documents that require your approval.

| â          | TEXAS TECH UNIVERSITY<br>HEALTH SCIENCES CENTER. |            |                            |                               |                   | All ▼ S                    | earch (Alt+Q) Q | 0.00 USD 👻 🗢         | • • •         |
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|            | Requisitions Purchase Order Change Requests I    | invoices   | Sourcing Events Evaluation | n Sourcing Events My          | Approval          | s Page                     |                 |                      |               |
| 0          | Your Selections                                  | . Total Re | esults 1 Display 20 per fo | older 👻                       | <u> </u>          |                            |                 |                      |               |
| **         | Date Range                                       | ~ MY       | PR APPROVALS               |                               |                   |                            |                 |                      |               |
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|            | View Approvals For                               |            | 3374933                    | ABC Tent and Party Rental Inc | Thi Bui           | 10/26/2021 10:50 AM        | Thi Bui         | 1.00 USD             | @ Ľ ✓         |
| <b>8</b> 9 | My Approvals                                     |            | Requisition Name           | 2021-10-26 SBM388 01          | Folders           | 6 Days in folder [My PR Ap | provals]        |                      |               |
| >          | Assigned Approver $ \cdot $ Thi Bui $ 	imes $    |            | No. of line items          | 1                             |                   |                            |                 |                      |               |
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| ð          | ↑ FOLDERS  |            |                            |                               |                   |                            |                 |                      |               |

#### Filters:

Filters are available on the left side of the approvals page and allow you to refine your search and narrow down the approval documents displayed. As you select filter options, the documents displayed will be refined and the Your Selections area will be updated. You can refine the documents displayed by View Approvals For and Date Range.

You can sort the approval documents by various Filters such as Folders, Business Unit, Supplier, Custom Fields, Department, Priority, Form Type, Prepared By, and Prepared For. To select a specific filtering criteria, click the **item** in the filter section. The numbers in parentheses to the right of the filters indicate how many documents fit that criteria.



#### Aging Information:

Aging information pertaining to each document allows you to see how long a document has been in a folder. The aging information is the specific number of days the document has been sitting in the approval folder followed by the name of the specific folder.

#### Available Actions:

You can take several actions from the My Approvals page.

- Attachments Icon If you need to attach additional documents to the Purchase Request, select the *𝒫* paperclip icon next to the Amount column.
- **Approve/Complete Icon** To quickly approve/complete the document in your My PR Approvals folder, select the ✓ check mark.
- **Requisition Quick View Icon** To view more details regarding the Requisition, select the <sup>□</sup> icon. This view will provide a summary of the requisition and allow you to print the information, if needed.
- Action Menu The action drop-down menu allows you to perform an action on one or more documents. The menu will appear once an item is selected by checking a box to the left of the Reguisition Number. Select the desired action from the action drop-down menu. Once an action is selected it will be immediatedly completed.

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|          | Approvals  |           |                          |                              | Atta   | chma                  | nte Poqui               | sition (          | wick       | ite Newest First 👻 |
| 16       | Requisitions Purchase Order Change Requests            | Invoices  | Sourcing Events Evaluati | ion Sourcing Events          |        | $\sqrt{2}$ $\Delta r$ | nrove/Co                | mnlata l          | cone       |                    |
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|          | All Dates 🗸  |           | REQUISITION NO.          | SUPPLIERS                    | ASS    | SNED APPROVER         | PR DATE/TIME            | REQUISITIONER     | АМос       |                    |
| -25      | View Approvals For                                     |           | 3374933                  | ABC Tent and Party Rental In | nc Thi | ui                    | 10/26/2021 10:07 AM     | Thi Bui           | 1.00 USD   | 0 C /              |
| <b>*</b> | My Approvals   |           | Requisition Name         | 2021-10-26 SBM388 01         | Fold   | ers                   | 0 Days in folder [My Pf | Approvals]        |            |                    |
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| ¥.       | Select Multiple [5                                     |           | Aging                    | 1200.04                      |        |                       | O Davis in folder [Mr B | Anneounial        |            | · L =•             |
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|          | Sciences Center)     SUPPLIER                          | -         |                          |                              |        |                       |                         |                   |            |                    |
|          | ABC Tent and Party Rental Inc 2                        |           |                          |                              |        |                       |                         |                   |            |                    |
|          |  |           | Action                   | Manu                         |        |                       |                         |                   |            |                    |
|          | Advanced Pay<br>Buyer Name                             |           | ACLION                   | ivienu                       |        |                       |                         |                   |            |                    |
|          | Chart  |           |                          |                              |        |                       | -                       |                   |            |                    |
| ~        | Account  |           | U TIEMS SELECTED         |                              |        | Select an action      | •                       |                   |            |                    |

#### Assigning a Requisition to Yourself to Approve

If an approval step can be approved by more than one person, you should assign the requisition to yourself prior to approving. Assigning the document to yourself signifies that you are responsible for the review and approval of the requisition. The document should state Not Assigned in the Assigned Approver column. If the document has been assigned, the name of the Approver will appear in the Assigned Approver column and that individual has taken the responsibility to approve the requisition.

To assign the document to yourself, locate the requisition you wish to assign for your approval and click the **\*** Assign icon.

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|        | View Approvals For                               | TB003804                      | ABC Tent and Party Rental Inc | Not Assigned      | 9/8/2020 3:4     | ecian la             | on                 |                          |
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| a?     | WaltForPOPost 4                                  | TB004139                      | ABC Tent and Party Rental Inc | Not Assigned      | 9/1/2021 8:10 AM | Thi Bui              | 1.00 USD           | Ľ 4.                     |
| \$     | Banner Hold HSC 1 1                              | No. of line items:            | 1                             |                   | Folders          | 55 Days in folder [E | Banner Hold HSC 1] |                          |
|        | Select Multiple C                                | > WAITFORPOPOST 4             |                               |                   |                  |                      |                    |                          |

Once you assign the requisition to yourself, it will populate in your My PR Approvals folder and cannot be approved by anyone but you. You are now listed as the Assigned Approver.

If you are the only person with authority to approve the requisition, the document will automatically populate in your My PR Approvals folder and it will not be necessary to assign it to you.

To move multiple requisitions to your My PR Approvals folder, select the **checkbox** for the individual documents that you would like to assign to your approvals folder or select the **checkbox** in the folder header to select all available requisitions.

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| 6          | Requisitions Purchase Order Change Requests Invo  | oices Sourcing E  | Select                        |                   |                         |                  |                |               |
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|            | View Approvals For                                | 3374933           | ABC Tent and Party Rental Inc | Thi Bui           | 10/26/2021 10:07 AM     | Thi Bui          | 1.00 USD       | @ ℃ ✓         |
| 199        | ту Арричаю  | Requisition Name  | 2021-10-26 SBM388 01          | Folders           | 0 Days in folder [My PR | Approvals]       |                |               |
| <b>}</b> = | Filters   | No. of line items | 1                             |                   | 0 Days in folder [TTUHS | C Hold for Orgn] |                |               |

After you have selected the requisitions to assign, select the **Assign** option from the Action drop-down menu.



### **Unassigning a Requisition**

An approver must assign a requisition to themselves prior to approving or rejecting the document. Once you assign the requisition and it appears in your My PR Approvals folder, no other approver will have the ability to approve or complete the order. If you assign a requisition to yourself and another approver in your department needs to process the order, you must return the requisition to the shared folder.

Select the **assigned requisition** from your My PR Approvals folder by selecting the **checkbox** to the left of the Requisition No. column.

|            | _  |          |                            |                               |                   |                 |              |                |   |            |                         | - |
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| 合          | TEXAS TECH UNIVERSITY<br>HEALTH SCIENCES CENTER. |          |                            |                               |                   |                 | All 👻        | Search (Alt+Q) | ۹ | 0.00 USD 📱 | V IV I                  |   |
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| <b>*</b>   |  | ✓ MY F   | R APPROVALS                |                               |                   |                 |              |                |   |            |                         |   |
| 105<br>III | Select   |          | REQUISITION NO.            | SUPPLIERS                     | ASSIGNED APPROVER | PR DATE/TIME    |              | REQUISITIONE   | R | AMOUNT     |                         |   |
| .20        | Checkbox -                                       |          | 3374933                    | ABC Tent and Party Rental Inc | Thi Bui           | 10/26/2021 10:5 | 0 AM         | Thi Bui        |   | 1.00 USD   | 0 Ľ <                   |   |
|            |  |          | Requisition Name           | 2021-10-26 SBM388 01          | Folders           | 0 Days in       | folder [My F | R Approvals]   |   |            |                         |   |
| >          | Assigned Approver + Thi Bui $	imes$              |          | No. of line items          | 1                             |                   |                 |              |                |   |            |                         | _ |
| ль         |  |          |                            |                               |                   |                 |              |                |   |            |                         |   |
| ត          | Filters  |          |                            |                               |                   |                 |              |                |   |            |                         |   |

Once the document is marked, select **Return to Shared Folder** from the Action dropdown menu.

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|            | Requisitions Purchase Order Change Requests                              | Invoices \$  | Sourcing Events Evaluation | n Sourcing Events             |                   |                        |                  |            |                     |
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| 46         | Man Assessed For   |              | negoismon no.              | SUTERS                        | ASSIGNED AT NOTEN | TRUNCTION.             | REGISTIONER      | Allocat    |                     |
| -70        | View Approvals For   | $\checkmark$ | 3374933                    | ABC Tent and Party Rental Inc | Thi Bui           | 10/26/2021 10:50 AM    | Thi Bui          | 1.00 USD   | @ Ľ ✓               |
| <b>\$</b>  | wy Approvans   |              | Requisition Name           | 2021-10-26 SBM388 01          | Folders           | 0 Days in folder [My F | R Approvals]     |            |                     |
| >          | Assigned Approver + Thi Bui $\ 	imes$                                    |              | No. of line items          | 1                             |                   |                        |                  |            |                     |
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|            | ^ FOLDERS  |              |                            |                               |                   |                        |                  |            |                     |
| *          | My PR Approvals 1  |              |                            |                               |                   |                        |                  |            |                     |
|            | ^ BUSINESS UNIT  |              |                            |                               | Select Re         | eturn to               |                  |            |                     |
|            | Texas Tech University Health Sciences Center (Health<br>Sciences Center) |              |                            |                               |                   |                        |                  |            |                     |
|            |  |              |                            |                               | Shared            | Folder                 |                  |            |                     |
|            | ABC Tent and Party Rental Inc 1  |              |                            |                               |                   |                        |                  |            |                     |
|            |  |              |                            |                               |                   |                        |                  |            |                     |
|            | Advanced Pay   |              |                            |                               |                   | ,                      |                  |            |                     |
|            | Buyer Name   |              |                            |                               | •                 |                        |                  |            |                     |
|            | Chart  |              | ITEMS SELECTED             |                               | Select an action  | •                      |                  |            |                     |
| 0          | Account  |              |                            |                               |                   |                        |                  |            |                     |

The document will no longer appear in your My PR Approvals folder. It is returned to your shared folder and any departmental approver will have the ability to assign the requisition for approval.

#### **Reviewing a Requisition**

#### As an Approver it is your responsibility to review a requisition before approving

**or rejecting.** By approving a requisition, you are agreeing that the correct departmental and purchasing policies have been followed and that accounting information is correct. To review a pending requisition, locate My PR Approvals folder from the My Approvals page. To open a requisition, click the **Requisition Number**.

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| ŵ          | Date Range                                       | ✓ MY PR APPROVALS 1                         |                               |                   |                         |                  |              |                    |
|            | All Dates  | REQUISITION NO.                             | SUPPLIERS                     | ASSIGNED APPROVER | PR DATE/TIME            | REQUISITIONER    | AMOUNT       |                    |
| -26        | View Approvals For                               | 3374933                                     | ABC Tent and Party Rental Inc | Thi Bui           | 10/26/2021 10:50 AM     | Thi Bui          | 1.00 USD     | @ Ľ ✓              |
| <b>*</b>   | My Approvals                                     | Requisitio Mame                             | 2021-10-26 SBM388 01          | Folders           | 0 Days in folder [My PR | (Approvals)      |              |                    |
| `≽         | Assigned Approver + Thi Bui $\ \times$           | No. of line items                           |                               |                   |                         |                  |              |                    |
| Ide        | Filtare  |   | Click Re                      | quisition N       | lumber                  |                  |              |                    |
| <b>a</b> > | THE S  |   | P                             |                   |                         |                  |              |                    |

The requisition Summary page will open. As an approver, you have the ability to change the information on the requisition if necessary by clicking **Edit**  $\checkmark$ . You can review the requisition from the Summary page by checking the Shipping, Billing, Line and Header FOAP Summary and Supplier Info.

| â        | TEXAS TECH UNIVERSITY<br>HEALTH SCIENCES CENTER.                          |   | All - Search (Alt+Q)                                       | 🔍 0.00 USD 📜 🛇 🏴 🔺 💄                       |
|----------|---|---|--|--|
|          | Requisition ▼ : 138697268   | <pre></pre>   |  |  |
| í.       | Summary PO Preview Comments Atta  | achments History  |  | Review                                     |
| 9        | General 💉 …   | Shipping 🦯 …  | Billing 💉 🗸  | Summary                                    |
| e s      | Status<br><b>Pending</b><br>Banner FOAPAL Approval (Thi Bui)<br>Submitted | Ship To<br>Contact Name Thi Bui<br>Phone +1 806-743-7841<br>Email thi bui/attuhsc.edu | Bill To<br>TTUHSC Payables<br>Box 5970<br>Lubbock TX 79408 | Senotal (5.00 USD)                         |
| <b>3</b> | 2/22/2021 11:55 AM<br>Cart Name<br>2020-12-07 SBM388 01                   | Tx Tech Univ HSC<br>3601 4TH ST<br>Rm/STOP 200a<br>LUBBOCK, TX 79430                  | United States Billing Options                              | Approve   Reject                           |
| Ш<br>Г   | Description<br><i>no value</i>  | United states   | Accounting Date<br>2/10/2021                               | What's next?  Workflow                     |
| <b>.</b> | Priority<br>Normal  | Cardinal Account Code<br>Medical/Surgical Supplier                                    |  | Show skipped steps                         |
| \$       | Prepared by<br>Thi Bui  | no value  |  | Submitted<br>2/22/2021 11:55 AM<br>Thi Bui |

• Line and Header FOAP Summary: valid FOAP combination.

|  |                        |                             |                            |                            | Account -                |   |          | Activity - |
|--|------------------------|-----------------------------|----------------------------|----------------------------|--------------------------|---|----------|------------|
| Chart  | Fund                   | Fund - Banner               | Organization               | Account                    | Banner                   | Program                                 | Activity | Banner     |
| <b>H</b><br>Fexas Tech Univ<br>Health Sciences | 181183-H<br>Purchasing | <b>181183</b><br>Purchasing | 201181-H<br>Purchasing Lbk | 730000-H<br>SM Consumables | 730000<br>SM Consumables | <b>60-H</b><br>Institutional<br>Support | no value | no value   |

Header Level Notes and Attachments

| nternal Notes and At | achments 🦯 … |  | External Notes and A          | , de 1 · · · · · · · · · · · · · · · · · · |  |
|----------------------|--------------|--|-------------------------------|--|--|
| nternal Note         | no value     |  | Note to all Suppliers         | no value                                   |  |
| nternal Attachments  | Add          |  | Attachments for all suppliers | Add  |  |
| vent Title           | no value     |  |                               |  |  |
|                      |              |  | PO Clauses                    | Add  |  |

• Line Level Notes and Attachments

| Summus Staples · 1 Item · 5.00 Us | SD                                   |                |   |              | 🗌   |
|-----------------------------------|--------------------------------------|----------------|---|--------------|-----|
| 🔺 SUPPLIER DETAILS 🗳 🏦 💲 🎫 🛠 🛽    | PO Purchase Order 1 : 500 Staples Dr | Apt MS309R 👻   |   |              |     |
| Contract H-C15221                 | PO Number                            | To Be Assigned |   |              |     |
| Status Item                       | Catalog No.                          | Unit Price     | Quantity  | Ext. Price   |     |
| 1 🥏 TEST                          | Test                                 | 5.00           | Qty: 1 1/EA   | 5.00         |     |
| ▲ ITEM DETAILS                    |                                      |                |   |              | ,#* |
| Contract:<br>H-C15221             | Commodity Code<br><i>no value</i>    |                | Internal Note<br><i>no value</i>                                    |              |     |
| Part Number<br>Test               |                                      |                | Internal Attac<br>Add   | hments       |     |
| Specifications/Long Text<br>TEST  | Line Level Notes a<br>Attachments    |                | <ul> <li>External Note<br/>no value</li> <li>Attachments</li> </ul> | for supplier |     |
|                                   |                                      |                | Add   |              |     |

• Supplier / Line Item Detail: review the items on the order.

| Summus Staples · 1 Item · 5.00 USD |                                      |                |                                    |              | 🗆      |
|------------------------------------|--------------------------------------|----------------|------------------------------------|--------------|--------|
| 🔺 SUPPLIER DETAILS 🗳 🏦 💲 🎫 🗙 🎹     | PO Purchase Order 1 : 500 Staples Dr | Apt MS309R 🔻   |                                    |              |        |
| Contract H-C15221                  | PO Number                            | To Be Assigned |                                    |              |        |
| Status Item                        | Catalog No.                          | Unit Price     | Quantity                           | Ext. Price   |        |
| 1 <i>ஜ</i> TEST                    | Test                                 | 5.00           | Qty: 1 1/EA                        | 5.00         | 🗌      |
| ▲ ITEM DETAILS                     |                                      |                |                                    |              | . Mari |
| Contract:<br>H-C15221              | Commodity Code<br><i>no value</i>    |                | Internal Note<br><i>no value</i>   |              |        |
| Part Number<br>Test                | Recurring Payment                    |                | Internal Attao<br><mark>Add</mark> | chments      |        |
| Specifications/Long Text<br>TEST   | Advanced Pay                         |                | External Note<br><i>no value</i>   | 9            |        |
|                                    |                                      |                | Attachments<br><mark>Add</mark>    | for supplier |        |

After all items have been reviewed and edited as necessary, you can approve, reject, return, forward, or return the requisition to the shared folder.

### **Approving a Requisition**

**Standard Approval:** With Standard Approval, you open the requisition, review the information, make any changes needed, and then approve the requisition.

To approve the requisition, select **Approve**.

| â         | TEXAS TECH UNIVERSITY<br>HEALTH SCIENCES CENTER. |   | All - Search (Alt+Q)         | Q 0.00 USD 📜 ♡ 🔎 🗳 💄            |
|-----------|--|---|------------------------------|---------------------------------|
|           | Requisition - : 138697268                        |   | ୯                            | I of 1 Results • < >            |
| 6         | Summary PO Preview Comments Att                  | achments History  |                              |                                 |
| <b>e</b>  | General 💉 …                                      | Shipping  | Billing 💉 🚥 🗸                | Pending                         |
|           | Status   | Ship To   | Bill To                      | Total (5.00 USD)                |
| Ê         | Pending<br>Banner FOAPAL Approval (Thi Bui)      | Contact Name Thi Bui  | TTUHSC Pavables              | Subtotal 5.00                   |
| 25        | Submitted<br>2/22/2021 11:55 AM                  | Phone +1 806-743-7841<br>Email thi.bui@ttuhsc.edu<br>Tx Tech Univ HSC | Lubt Select                  | 5.00                            |
| <b>\$</b> | Cart Name<br>2020-12-07 SBM388 01                | 3601 4TH ST<br>Rm/STOP 200a<br>LUBBOCK, TX 79430                      | Approve                      | Approve  Reject                 |
| 1         | Description                                      | United States   | Billing options              | What's next?                    |
|           | no value   |   | Accounting Date<br>2/10/2021 | Workflow                        |
|           | Priority<br>Normal                               | Cardinal Account Code   |                              | Show skipped steps              |
| ₽,<br>\$  | Prepared by<br>Thi Bui                           | Account Code<br>no value  |                              | Submitted<br>2/22/2021 11:55 AM |
|           | Principal Investigator<br>no value               | Delivery Options  |                              | Budget Authorization ••••       |
|           | Purchase Order                                   | Expedite  |                              | System                          |

**Quick Approval:** If you do not need to review or make changes to the requisition, you can use the Quick Approval method. Locate the document you want to approve in your My PR Approvals folder. Click the **Approve Action** button.

The requisition will no longer appear in your My PR Approvals folder. You can review the requisition using the Document Search feature. If you need additional information on locating and tracking the requisition, refer to the Document Search training videos and documents.

#### **Rejecting a Requisition**

TechBuy allows the approver to reject the entire requisition in one single action or to select specific line items to reject. If the entire order is rejected it cannot be resubmitted. If you select only specific line items to reject, the remaining items on the order will continue through the workflow approval process.

Open the requisition from your My PR Approvals folder and review the document. All items on the order will be listed under the Supplier / Line Item Details section.

| Summus Staples · 1 Item · 5.00 U | Supplier / Li                       | ne Item De     | tails sectior                      | ۱            | 🗆     |
|----------------------------------|-------------------------------------|----------------|------------------------------------|--------------|-------|
| 🔺 SUPPLIER DETAILS 🗳 🏦 💲 🎫 🐼     | PO Purchase Order 1 : 500 Staples D | r Apt MS309R 🔻 | ↓ I                                |              |       |
| Contract H-C1522                 | 1 PO Number                         | To Be Assigned |                                    |              |       |
| Status Item                      | Catalog No.                         | Unit Price     | Quantity                           | Ext. Price   |       |
| 1 🧭 TEST                         | Test                                | 5.00           | Qty: 1 1/EA                        | 5.00         | ··· 🗆 |
| ▲ ITEM DETAILS                   |                                     |                |                                    |              | ,#*   |
| Contract:<br>H-C15221            | Commodity Code<br><i>no value</i>   |                | Internal Note<br><i>no value</i>   |              |       |
| Part Number<br>Test              | Recurring Payment                   |                | Internal Attac<br><mark>Add</mark> | hments       |       |
| Specifications/Long Text<br>TEST | Advanced Pay                        |                | External Note<br><i>no value</i>   |              |       |
|                                  |                                     |                | Attachments<br>Add                 | for supplier |       |

To reject the entire requisition, select the **Reject button** to the right.

|                            |                     |                                   |                 |                                   |         |               | Pending                                     |      |
|----------------------------|---------------------|-----------------------------------|-----------------|-----------------------------------|---------|---------------|---|------|
| Item                       |                     |                                   |                 |                                   |         |               | Total (5.00 USD)                            |      |
| hem                        |                     |                                   |                 |                                   |         |               | Subtotal                                    | 5.00 |
| Summus Staples · 1 Item    | · 5.00 USD          |                                   |                 |                                   |         | 🗆             |   | 5.00 |
| SUPPLIER DETAILS 🚳 🏦 S     | 5 💷 🚓 🎹 🛛 PO Purcha | use Order 1 : 500 Staples D       | Ir Apt MS309R 🔻 |                                   |         |               |   | 5.00 |
| Contract                   | H-C15221 PC         | ) Number                          | To Be Assigned  |                                   | Select  |               | Approve                                     | -    |
|                            |                     |                                   | <u> </u>        | _                                 | Reiect  | $\rightarrow$ | Reject                                      |      |
| Status Item                |                     | Catalog No.                       | Unit Price      | Quantit                           |         |               | What's nevt?                                |      |
| ₽ TEST                     |                     | Test                              | 5.00            | Qty: 1 1/EA                       | 5.00    | 🗆             | Workflow                                    |      |
| ▲ ITEM DETAILS             |                     |                                   |                 |                                   |         | 1             | Show skipped steps                          |      |
| Contract:<br>H-C15221      |                     | Commodity Code<br><i>no value</i> |                 | Internal Note<br><i>no value</i>  | 2       |               | Submitted<br>2/22/2021 11:55 AM             |      |
| Part Number<br><b>Test</b> |                     | Recurring Payment                 |                 | Internal Atta<br><mark>Add</mark> | chments |               | Thi Bui                                     |      |
| Specifications/Long Tex    | t                   | Advanced Pay                      |                 | External Note<br><i>no value</i>  | e       |               | Budget Authorization<br>Completed<br>System | •••  |

The Reject Requisition window will appear. Enter the **PR Reject Reason** in the text box and click **Reject Requisition**.

| ic<br>o   | Add Non-Catalog Item Requisition PR Approvals                  | PO Preview Cor       | Available Actions: Reject Requisition  | Ƴ Go                      |
|-----------|--|----------------------|--|---------------------------|
| ATK.      | Summary Shipping   | Billing Line         | e and Header FOAP Summary Supplier Info  | a ?                       |
| 血         |  | General              | Reject Requisition × Billing   | e value descriptions<br>? |
| <u>12</u> | Status   | 🥙 Pending            | WARNING: You are about to reject ALL lines on this requisition. Once a PR is rejected, it  | edit                      |
| 35        | Enter <b>Rej</b><br>Reaso                                      | ect<br>n             | 2 AM<br>Value 2 AM |                           |
| 0         |  | Thi Bui              | Options  | edit                      |
| ш         | Principal Investigator<br>Purchase Order<br>Classification     | no value<br>no value | Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is<br>attached, it is accessible from the History tab of the document.   | wadit bu line item        |
| a7<br>    | Texas SmartBuy PO #<br>Technology Acquisition<br>Justification | Click F              | Reject Requisition Reject Requisition Close  | wycon by mie item         |
| 8         | Property Review  | no value             | Delivery Options edit  |                           |

The requisition will no longer appear in your My PR Approvals folder. You can review the requisition using the Document Search feature. If you need additional information on locating and tracking the requisition, refer to the Document Search training videos and documents.

#### **Rejecting Lines on a Requisition**

Open the requisition from your My PR Approvals folder. Select one or more line items to reject by selecting the **checkbox** to the right of the price. Click the drop-down and select **Reject Selected Items**.

|                                    |                                   |          |                           |        |              |      | Total (5.00 05D)               | *    |
|------------------------------------|-----------------------------------|----------|---------------------------|--------|--------------|------|--------------------------------|------|
| 1 Item                             |                                   |          |                           | 1      | $\checkmark$ | •    | Subtotal                       | 5.00 |
| Summus Staples · 1 Item · 5.00 USD | Select                            | Спеск    |                           |        | 🗸            | Reje | ect Selected Items             | 5.00 |
|                                    |                                   |          |                           |        | 1            | Cha  | nge Supplier                   |      |
| ▲ SUPPLIER DETAILS 🗳 🏛 \$ 🔤 🐼 🏧 PO | Purchase Order 1 : 500 Sta        | <i></i>  |                           |        |              | With | ndraw Selected Items           |      |
| Contract H-C15221                  | PO Number                         |          | belect                    |        |              | Add  | to Favorites                   |      |
| Status Item                        | Catalog No.                       | eject Se | elected Iter              | ns     |              | Add  | To Active Cart                 | ~    |
| 1 🧷 TEST                           | Test                              | 5.00     | Qty: 1 1/EA               | 5.00 • | - 🗸          | Add  | to Draft Cart or Pending PR/PO | > 🖻  |
|                                    |                                   |          |                           |        | _            | Add  | to PO Revision                 |      |
| ▲ ITEM DETAILS                     |                                   |          |                           |        |              | Cha  | nae Commodity Code             |      |
| Contract:<br>H-C15221              | Commodity Code<br><i>no value</i> |          | Internal Note<br>no value |        |              | Req  | uires Sourcing                 |      |
| Part Number                        | Recurring Payment                 |          | Internal Attachments      |        |              | Rem  | nove Requires Sourcing         |      |
| Test                               | ×                                 |          | Add                       |        | ļ            |      | Completed                      | •••  |

The Add Note window will appear. Enter the **Reject Line Reason** in the text box and click **OK**.

| 138697268                                  | Reject Line Item ×                       |         | ۲ | e              |
|--|--|---------|---|----------------|
| Enter Reject<br>Line Reason                | Reject Line Reason                       |         |   |                |
| les · 1 Item · 5.00 USD                    | 1000 characters remaining expand   clear | ~ ~<br> |   | Total<br>Subte |
| AILS 🍄 🏦 \$ 🔤 🛠 💷 PO Purcha<br>H-C15221 PO | Click OK Cancel                          |         |   |                |

The items you marked as rejected will have a small red X in the status icon to the left of the item description.

| Su | mmus Staples ·        | 1 Item · 0.00 USD              |                                   |                 |                                  |            | 🗌   |
|----|-----------------------|--------------------------------|-----------------------------------|-----------------|----------------------------------|------------|-----|
| ^  | SUPPLIER DETAILS      | 🕹 🏦 💲 🎫 🛠 🎹 PO Purc            | hase Order 1 : 500 Staples        | Dr Apt MS309R 🔻 |                                  |            |     |
|    | Contract              | H-C15221                       | PO Number                         | N/A             |                                  |            |     |
|    | Status Item           |                                | Catalog No.                       | Unit Price      | Quantity                         | Ext. Price |     |
| 1  |                       | Small Red X ir the Status Icor | n <sub>Test</sub>                 | 5.00            | Qty: 1 1/EA                      | 5.00       | ••• |
|    | ▲ ITEM DETAILS        |                                |                                   |                 |                                  |            |     |
|    | Contract:<br>H-C15221 |                                | Commodity Code<br><i>no value</i> |                 | Internal Note<br><i>no value</i> |            |     |

In order to finalize the order and approve the rejections, select **Approve** to the right.

|    |                      |                |                                 | PO Clauses         | Add           |            |   | Pending            |      |
|----|----------------------|----------------|---------------------------------|--------------------|---------------|------------|---|--------------------|------|
|    |                      |                |                                 |                    |               |            |   | Total (0.00 USD)   | ~    |
| 01 | Items                |                |                                 |                    |               |            |   | Subtotal           | 0.00 |
| Su | ımmus Staples · 1 li | tem · 0.00 USD |                                 |                    |               | Select     |   |                    | 0.00 |
|    |                      |                |                                 |                    |               |            |   | Approve            | -    |
| ^  | SUPPLIER DETAILS     | 🌉 Ş 🔤 🐼 🎹 P    | O Purchase Order 1 : 500 Staple | es Dr Apt MS309R 🔻 |               |            | 5 | Reject             |      |
|    | Contract             | H-C15221       | PO Number                       | N/A                |               |            |   |                    |      |
|    | Status Item          |                | Catalog No.                     | Unit Price         | Quantity      | Ext. Price |   | What's next?       | ~    |
|    | otatao nem           |                | outdrog No.                     | onit i noc         | quantity      | Externice  |   | Workflow           |      |
| 1  | 🎦 TEST               |                | Test                            | 5.00               | Qty: 1 1/EA   | 5.00       | 🗆 | Show skipped steps |      |
|    | ▲ ITEM DETAILS       |                |                                 |                    |               |            |   | Submitted          |      |
|    | Contract:            |                | Commodity Code                  |                    | Internal Note |            |   | 2/22/2021 11:55 AM |      |
|    | H-C15221             |                | no value                        |                    | no value      |            |   | INIBU              |      |

The requisition will no longer appear in your My PR Approvals folder. You can review the requisition using the Document Search feature. If you need additional information on locating and tracking the requisition, refer to the Document Search training videos and documents.

When an approver rejects a requisition or specific line items, the submitter will receive an email notification. Review the TechBuy User Profile document for more information. The reason for the rejection is listed at the bottom of the email.

| Re: LINE ITEM(S) REJECTED FOR REQUISITION#: 871645 Cart Name: 2012-10-29 DFQ329 01 Prepared by: John Haynes Rejected by: Terry Dalton  |  |  |  |  |  |  |
|--|--|--|--|--|--|--|
| Dear John Haynes,  |  |  |  |  |  |  |
| One or more line items on the requisition listed above have been rejected. You can review the details of this requisition online by using "My Requisitions", or by selecting the URL below.              |  |  |  |  |  |  |
| https://usertest.sciquest.com/apps/Router/ReqSummary?<br>ReqId=871645&AuthUser=476916&NavLevel1=Nav Document Search&NavLevel2=Nav Document Simple Search&tmstmp=1351528665357                            |  |  |  |  |  |  |
| If you have any questions with regard to this requisition, please contact the approver who rejected one or more line items or contact your SelectSite Support Team.<br>Support Team Contact Information: |  |  |  |  |  |  |
| +1 (806) 743-7841<br>purchasing@ttuhsc.edu   |  |  |  |  |  |  |
| Thank you,<br>Texas Tech   |  |  |  |  |  |  |
| The following notes were attached to this requisition during the workflow process:<br>Test - Reject Line Item on a Requisition   |  |  |  |  |  |  |

### **Returning a Requisition**

TechBuy allows an approver to return a requisition to the submitter. This will permit the submitter to make corrections to the order and resubmit into the workflow approval process. In order to return a requisition, you must first assign the requisition to yourself and open it for review.

Select **Return to Requisitioner** from the Approve button drop-down menu.

| â             | TEXAS TECH UNIVERSITY<br>HEALTH SCIENCES CENTER.                          |   |          |   | All 👻 v8        | 803799 | ۹ | 0.00 US                     | d 🛱                  | ∽ №     | ≥ 🔺 1   |
|---------------|---|---|----------|---|-----------------|--------|---|-----------------------------|----------------------|---------|---|
|               | Requisition ▼ : 138697268   |   |          |   |                 |        | ۲ | ₿ 0                         | 1 of 1 Re            | sults 🕶 | < >   |
| 5             | Summary PO Preview Comments   | Attachments History   |          |   |                 |        |   |                             |                      |         |   |
| <u>e</u>      | General 🧳 …   | Shipping  | ø        | Billing   |                 | y v    |   |                             | Pendir               | ıg      |   |
| 宜<br>梁        | Status<br><b>Pending</b><br>Banner FOAPAL Approval (Thi Bui)<br>Submitted | <b>Ship To</b><br>Contact Name Thi Bui<br>Phone +1 806-743-7841<br>Email thi.bui@ttuhsc.edu |          | <b>Bill To</b><br>TTUHSC Payable<br>Box 5970<br>Lubbock, TX 794 | es<br>108       |        | 2 | Fotal (5.00 USE<br>Subtotal | )                    |         | <ul><li>✓</li><li>5.00</li><li>5.00</li></ul> |
| <b>3</b><br>3 | 2/22/2021 11:55 AM<br>Cart Name<br>2020-12-07 SBM388 01<br>Description    | Tx Tech Univ HSC<br>3601 4TH ST<br>Rm/STOP 200a<br>LUBBOCK, TX 79430<br>United States       | Sel<br>R | ect <b>Ret</b><br>equisit                                       | urn to<br>ioner | _      |   | Return to R                 | Approve<br>equisitio | ner     |   |
| ці<br>Ці      | no value<br>Priority<br>Normal  | Cardinal Account Code   |          | 2/10/2021   |                 |        | Ň | Workflow                    | ow skippe            | d steps |   |

The Return to Requisitioner window will open. Enter a **Reason** for the return to inform the submitter of the purpose for returning the document and select **Save Changes**.

|                           | Return To Requisitioner  | Enter <b>Reason</b>  | ×                          |
|---------------------------|--|--|----------------------------|
| hmer                      |  |  |                            |
| Shij                      |  |  | · ·                        |
| Ship                      | 1000 characters remaining  |  | expand   clear             |
| Con<br>Pho<br>Ema<br>Tx T | Characters beyond the limit are note is attached, it is accessible | not saved, i.e., the note is trunc<br>from the History tab of the do | cated. Once the<br>cument. |
| 360<br>Rm/<br>LUB         | Save Changes   | Save Change  | es Cancel                  |

When an approver returns a requisition, the submitter will receive an email notification. Review the TechBuy User Profile document for more information. The reason for return is listed at the bottom of the email.

| Re: REQUISITION RETURNED FOR REQUISITION#: 865016 Cart Name: 2012-10-21 DFQ329 02 Prepared by: John Haynes Returned by: Terry Dalton                 |
|--|
| Dear John Haynes,  |
| This requisition has been returned. To modify the requisition go to the "Draft Carts", page using the URL below.                                     |
| https://usertest.sciquest.com/apps/Router/CartList?AuthUser=476916&tmstmp=1351537654433  |
| ****   |
| If you have any questions with regard to this requisition, please contact the approver who returned the requisition or your SelectSite Support Team. |
| Support Team Contact Information:<br>+1 (806) 743-7841<br><u>purchasing@ttuhsc.edu</u>   |
| Thank you,<br>Texas Tech   |
| The following notes were attached to this requisition during the workflow process:<br>Test - Return to Requisitioner                                 |

When a requisition is returned, the submitter will have access to it in the My Returned Requisitions section of the Shopping Carts – Drafts page. As a draft cart, the submitter will have the ability to make any necessary changes, deletions, or additions and resubmit the order. The history of the order will remain attached but the order will process back to each workflow approval step.

#### Forwarding a Requisition

You may decide that a different individual with approval authority for your department is a more appropriate approver for a particular order and want to forward a requisition to that person.

To forward a requisition, check the **box** to the left of the Requisition No. column from the My Approvals page. Select **Forward...** from the Action drop-down menu.

|              | TEXAS TECH UNIVERSITY<br>HEALTH SCIENCES CENTER.  |        |                       |                               |                   | All 🕶                  | Search (Alt+Q) Q | 0.00 USD 📜 🗢       | P 🔹 🖬          |
|--------------|---|--------|-----------------------|-------------------------------|-------------------|------------------------|------------------|--------------------|----------------|
| 7            | Approvals   |        |                       |                               |                   |                        | ۲                | Logout Submit Date | Newest First 💌 |
| 6            | Requisitions Purchase Order Change Requests   | Invoic | Select                | t the <b>Requis</b>           | sition            |                        |                  |                    |                |
| 0            | Filters   |        | Total cospilar 20 per | TUIDET -                      |                   |                        |                  |                    |                |
|              |   |        | ✓ MY PR APPROV S 1    |                               |                   |                        |                  |                    |                |
| ш            |   | 1      |                       | SUPPLIERS                     | ASSIGNED APPROVER | PR DATE/TIME           | REQUISITIONER    | AMOUNT             |                |
| -16          | A BUSINESS UNIT     ■ |        | 3374933               | ABC Tent and Party Rental Inc | Thi Bui           | 10/26/2021 10:50 AM    | Thi Bui          | 1.00 USD           | @ ⊑ ✓          |
| 89°          | Texas Tech University Health Sciences Center (Health<br>Sciences Center)  | 1      | Requisition Name      | 2021-10-26 SBM388 01          | Folders           | 6 Days in folder [My l | PR Approvals]    |                    |                |
| >            | ∧ SUPPLIER  |        | No. of line items     | 1                             |                   |                        |                  |                    |                |
|              | ABC Tent and Party Rental Inc   | 1      |                       |                               |                   |                        |                  |                    |                |
| lik          | CUSTOM FIELDS   |        |                       |                               |                   |                        |                  |                    |                |
| ត្           | Advanced Pay  |        |                       |                               |                   |                        |                  |                    |                |
|              | Buyer Name  |        |                       |                               |                   |                        |                  |                    |                |
| - <b>Q</b> - | Chart   |        |                       |                               |                   |                        |                  |                    |                |
|              | Account   |        |                       |                               |                   |                        |                  |                    |                |
|              | See all Custom Fields I Select Multiple IS  |        |                       |                               |                   |                        |                  |                    |                |
|              | CURRENT WORKFLOW STEP   |        |                       |                               |                   |                        |                  |                    |                |
|              | Banner FOAPAL Approval  | 1      |                       |                               | Selec             | ct Forward             | d                |                    |                |
|              | ∧ STATE   |        |                       |                               |                   |                        |                  |                    |                |
|              | Assigned  | 1      |                       |                               |                   |                        |                  |                    |                |
|              | △ DEPARTMENT  |        |                       |                               |                   | 1                      |                  |                    |                |
|              | No Department   | 1      |                       |                               |                   |                        |                  |                    |                |
| 0            |   |        | ITEMS SELECTED        |                               | Select an action  | · •                    |                  |                    |                |

The User Search window will open. Enter the **Last Name** and **First Name** of the person who will receive the requisition and click **Search**.

| User Search      |                      |                 | ? |
|------------------|----------------------|-----------------|---|
| Last Name 😨      | Haynes               | Enter Last Name | 1 |
| First Name 📀     | John                 | and First Name  |   |
| User Name 😨      |                      | _               |   |
| Email 3          |                      |                 |   |
| Business Unit 🔞  | Business Unit Name Q |                 |   |
| Department 📀     | ~                    |                 |   |
| Role 😨           | ~                    |                 |   |
| Results Per Page |                      |                 |   |
| Search           | Click Search         |                 |   |

The results meeting your search criteria will open. Click [select] in the Action column.

| New Search   |             |                          |                |          |
|--------------|-------------|--------------------------|----------------|----------|
| Name 🔺       | User Name 🗠 | Email 🗠                  | Phone          | Action   |
| Haynes, John | DFQ329      | john.g.haynes@ttuhsc.edu | Click [Select] | [select] |

The **Forward...** window will appear. Enter a **short note** to the user with the reason for forwarding the requisition and select **Forward**.

| Forward  | ? | x |
|--|---|---|
| For Requisition  |   |   |
| To - John Haynes   |   |   |
| Test. Forwarding a Requisition.  |   |   |
|  |   |   |
| 968 characters remaining expand   clear  |   |   |
| Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the document. | s |   |

The requisition is now assigned to the selected user to approve. After you forward a requisition, only the Assigned Approver has the ability to approve the requisition.

#### **My Recent Approvals**

My Recent Approvals presents the Approver with a list of everything they have either approved, rejected or returned. This feature allows you to quickly see a snapshot of the requisitions you have processed. To access My Recent Approvals, click the **Orders & Documents** icon, **Approvals**, and **Requisitions Recently Approved By Me**.

| <b>^</b>     | TEXAS TECH UNIVERSITY<br>HEALTH SCIENCES CENTER. |  |                   |                  | All 🔻  | Search (Alt+Q) | ٩         | 21.06 USD       | Ä       | ⊘ №          |           | T            |
|--------------|--|--|-------------------|------------------|--------|----------------|-----------|-----------------|---------|--------------|-----------|--------------|
|              | Approvals  |  |                   |                  |        |                | ۲         | Logout          | Submit  | t Date Newes | t First 🔻 |              |
| 6            | Orders   | Quick search Q                           |                   |                  |        |                |           |                 |         |              |           | _            |
| •            | Search   | Requisitions to Approve                  | y 20 per folder 🔻 |                  |        |                |           |                 |         |              |           |              |
| *            | My Orders  | Purchase Orders to Approve               |                   |                  |        |                |           |                 |         |              |           |              |
| ⋒            | Approvals •                                      | Change Requests to Approve               |                   | Click R          | lequis | sitions        |           |                 |         |              |           |              |
|              |  | Requisitions Recently Approved By Me     |                   | Recent           | ly An  | nroved         |           |                 |         |              |           |              |
| - <u>5</u> 2 |  | Purchase Orders Recently Approved By     | SUPPLIERS         | Recent           |        | proved         | REQ       | UISITIONER      | AMOU    | NT           |           |              |
|              |  | Assign Substitute Approvers-Requisitions |                   |                  | зу №е  | 9              |           |                 |         |              | - 3       | _            |
| հղ           |  | Assign Substitute Approvers-Purchase O   | ABC Tent and I    | <u>/</u>         |        | AM             | Thi E     | Bui             | 1.00 US | SD 🥖         | √ ئا      | <pre>/</pre> |
|              |  | Approval Notifications                   |                   |                  |        |                |           |                 |         |              |           |              |
| \$           | FULDERS  | Requisition Rama                         | 2021-10-26 S      | BM388 01 Folders | 3      | 0 Days in      | folder [M | y PR Approvals] |         |              |           |              |

By default, the documents in the Outbox will display in ascending order based on Approval Date. You can change the display order by clicking the **Requistion Number Arrow**. You can also sort by any of the other column display arrows available.

There are also several filtering options to narrow the list of documents that are displayed. As you select filter options, the documents displayed will be refined and the filters will be updated. To remove a filter, select the **Delete Filter** icon next to that filter or click **Clear All Filters** to remove all filters.

| *<br>•   | TRANS THOI I SURVISION<br>Criters > Search > Regulations<br>My Recent Approvals<br>Quick Filters My Searches   | Select Quick Filters   | All • Si               | earch (AIT+Q) Q    |   | Logout<br>· |
|----------|--|--|------------------------|--------------------|---|-------------|
| 。<br>〔1  | Supplier Supplier Supplier Supplier Supplier Supplier Supply Inc Suppl Inc Suppl Inc Suppl Inc Suppl Inc Suppl | Approved Date: Last 30 days + x Approved By: Bul, Thi + x<br>1-7 of 7 Results  | Requisition State      | AII F              | Submitted Date 2 Total Amount                                       | • •         |
| <b>용</b> | Completed  | approximation approved     approximation     approximation | Completed              | Thi Bui<br>Thi Bui | 10/28/2021 11:43:14 AM 1.00 USD<br>10/28/2021 11:37:09 AM 1.00 USD  | 3D<br>SD    |
| тг<br>Э  | Pending  Show More Business Unit   | 3379356         Regulation approved         10/28/2021 11:35:08 AM HSC Buyer 0         Select           3379356         Regulation approved         10/28/2021 11:27:88 AM HSC Buyer 0         Add Filter  | Completed<br>Completed | Thi Bui<br>Thi Bui | 10/28/2021 11:34:55 AM 18.48 USD<br>10/28/2021 11:27:22 AM 1.00 USD | 3D<br>SD    |
| ብ<br>በ   | Texas Tech University Health<br>Sciences Center (Health Sciences<br>Center)<br>Department  | Click Requisition  | Pending Completed      | Thi Bui<br>Thi Bui | 10/26/2021 10:50:21 AM 1.00 USD<br>10/6/2021 3:10:45 PM 1.00 USD    | 3D<br>3D    |
|          | No Department   Prepared For   | Number Arrow 221 309:16 PM HSC Buyer 0 ABC Tent and Perty Rental Inc @   | Completed              | Thi Bui            | 10/6/2021 3:08:56 PM 1.00 USD                                       | 3D          |
|          | Du, ITR Prepared By V<br>Bul, Thi 2  |  |                        |                    |   |             |

#### **Assign Substitute Approvers**

In the event that you, as an approver, are going to be absent or unavailable, you can designate an approver as a substitute. The substitute is able to review and approve documents routed to the original approver. The Assign Substitute Approvers pages present you with all of the folders you have access to and allow you to manage your substitutions separate from where you do your approvals.

Click Orders & Documents, Approvals, and select an Assign Substitute Approvers page.

| <b>^</b>   | TEXAS TECH UNIVERSITY<br>HEALTH SCIENCES CENTER. |  |                   |         | All 👻 | Search (Alt+Q) | ۹  | 21.06 USD     | Ä        | ∽ №        | <b>* 1</b> |
|------------|--|--|-------------------|---------|-------|----------------|----|---------------|----------|------------|------------|
| 7          | Approvals  |  |                   |         |       |                | ۲  | Logout        | Submit D | ate Newest | First 🔻    |
| 6          | Orders   | Quick search Q   |                   |         |       |                |    |               |          |            |            |
| <u>8</u>   | Search<br>My Orders                              | Requisitions to Approve<br>Purchase Orders to Approve              | y 20 per folder 👻 |         |       |                |    |               |          |            |            |
| Â          | Approvals >                                      | Change Requests to Approve<br>Requisitions Recently Approved By Me |                   |         |       |                |    |               |          |            |            |
| <b>2</b> 2 |  | Purchase Orders Recently Approved By                               | SUPPLIERS         | Clie    | ck As | sian           |    | JISITIONER    | AMOUNT   |            |            |
| հր         |  | Assign Substitute Approvers-Purchase O                             | ABC Tent and F    | Substit | ute A | pprove         | rs | Bui           | 1.00 USD | Ø          | Ľ ~        |
| \$         | - FULDERS  | периона нописацоня<br>периона нописацоня                           | 2021-10-26 S      |         |       |                |    | PR Approvals] |          |            |            |

From an Assign Substitute Approvers page, you can assign and remove substitutes to and from a single folder, multiple folders, or for all approval folders for which you are responsible.

#### Assign a Substitute to a Single Folder or Multiple Folders

Select the folder(s) by clicking the **checkbox** to the right of the Action button and click **Assign** next to that folder.

| <b>^</b> | TEXAS TECH UNIVERSITY<br>HEALTH SCIENCES CENTER. |                                  | All 👻 Search (Alt+Q)           | · · · · · · · · · · · · · · · · · · · |
|----------|--|----------------------------------|--------------------------------|---------------------------------------|
| _        | Orders  Approvals  Assign Substitute Appr        | overs-Requisitions               |                                | Select checkbox                       |
|          |  |                                  | Assign Substitute to All R     | 5                                     |
| í.       |  | Showing 1 - 20 of 106 Results    | All Folder Results             | Substitution Action                   |
| •        | Search Details                                   | Results Per Page 20              | Sort by: Folder name ascending | ■ Page 1 	 of 6 2                     |
| 414      |  | Folder N                         | ame Approve                    | er Substitute Action                  |
| -        | Filtered by                                      | Account Code 7L1890 Review       | Thi Bui                        | Assign                                |
| щ        | Type: Requisitions                               | Account Code Review              | Thi Bui                        | Assign                                |
| 392      |  | Account Code Review - IT Vendors | Thi Bui                        | Assign                                |
|          | Refine Search Results                            | Account Code Review - Recruiting |                                | Assign                                |
| <b>3</b> |  | Banner EH&S HSC - Amarillo       | Click Ass                      | ian Assign                            |
|          | Туре   | Banner EH&S HSC - Lubbock        |                                | Assign                                |
|          | Requisitions ~                                   | Banner HSC Federal Fund 21       | Thi Bui                        | Assign                                |

The Assign Substitute window will open. Enter the **Last Name** and **First Name** of the person or other search criteria to locate the approver and select **Assign**.

| Assign Substitu            |                     | × |
|----------------------------|---------------------|---|
| Include Date Range for Sub | stitution           |   |
| Substitute Name *          | Rodriguez, John × Q |   |
| * Required                 | lick Assign Clos    | e |

The substitute approver is assigned to the folder(s) and the name will appear in the Substitute column.

| Cardinal Ship To             | Substitute Approver | a Turnin | John Rodriguez | Remove |  |
|------------------------------|---------------------|----------|----------------|--------|--|
| Direct Pay with New Supplier |                     | a Turpin |                | Assign |  |

#### Assign a Substitute to All Folders

To assign a substitute approver to all your folders, click **Assign Substitute to All Requisition Folders**.

| â          | TEXAS TECH UNIVERSITY<br>HEALTH SCIENCES CENTER. |                                   | All 👻                   | Search (Alt+Q) Q                     | 0.00 USD 📜               | ♡   25              | <b>* 1</b> |
|------------|--|-----------------------------------|-------------------------|--------------------------------------|--------------------------|---------------------|------------|
|            | Orders > Approvals > Assign Substitute           | Click Assign<br>Substitute to All | All Folder Results      | gn Substitute to All Requisitions Fo | olders End Substitute fo | or All Requisitions | •D Logout  |
| ÷          | Search Details                                   | Requisition Folders               | Sort by: Folder name as | cending 💙                            |                          | ▲ Page 1 ➤ of       | 6 🕨 ?      |
| 474        |  | Folder Name                       |                         | Approver                             | Substitute               | Action              |            |
| -          | Filtered by                                      | Account Code 7L1890 Review        |                         | Thi Bui                              |                          | Assign              |            |
| щ          | Type: Requisitions                               | Account Code Review               |                         | Thi Bui                              |                          | Assign              |            |
| 312        |  | Account Code Review - IT Vendors  |                         | Thi Bui                              |                          | Assign              |            |
| <b>-</b> 0 | Refine Search Results                            | Account Code Review - Recruiting  |                         | Thi Bui                              |                          | Assign              |            |
| <b>P</b>   |  | Banner EH&S HSC - Amarillo        |                         | Thi Bui                              |                          | Assign              |            |
| _          | Туре   | Banner EH&S HSC - Lubbock         |                         | Thi Bui                              |                          | Assign              |            |
| 1          | Requisitions ~                                   | Banner HSC Federal Fund 21        |                         | Thi Bui                              |                          | Assign              |            |

The Assign Substitute window will open. Enter the **Last Name** and **First Name** of the person or other search criteria to locate the approver and select **Assign**.

| Assign Substitu                     | Enter Last and<br>First Name |        |    | ×    |       |  |  |
|-------------------------------------|------------------------------|--------|----|------|-------|--|--|
| Include Date Range for Substitution |                              |        |    |      |       |  |  |
| Substitute Name *                   | Turpin,                      | Lora   | ×  | Q    | ]     |  |  |
| * Required                          | Click                        | Assign | As | sign | Close |  |  |

The substitute approver is assigned to all folders and the name will appear in the Substitute column.

|            | TEXAS TECH UNIVERSITY<br>HEALTH SCIENCES CENTER. |  | All 👻                   | Search (Alt+Q) Q                   | 0.00 USD 🗎 🗮            | ♡ 🔎 🔺 👤                     |
|------------|--|--|-------------------------|------------------------------------|-------------------------|-----------------------------|
|            | Orders + Approvals + Assign Substitute Approve   | ers-Requisitions                       |                         |                                    |                         | -10 Logout                  |
|            |  |  | Assig                   | n Substitute to All Requisitions F | olders End Substitute f | or All Requisitions Folders |
| í.         |  | Showing 1 - 20 of 106 Results          | All Folder Results      |                                    |                         | Substitution Actions 💌      |
| ^          | Search Details                                   | ▲ Results Per Page 20 ×                | Sort by: Folder name as | ending 🖌                           |                         | ▲ Page 1 ➤ of 6 🕨 ?         |
| ×          |  |  | Folder Name             | Approver                           | Substitute              | Action                      |
| <b></b>    | Filtered by                                      | Account Code 7L1890 Review             |                         | Thi Bui                            | Lora Turpin             | Remove                      |
|            | Type: Requisitions                               | Account Code Review                    |                         | Thi Bui                            | Lora Turpin             | Remove                      |
| 112        |  | Account Code Review - IT Vendors       | Substitute Approve      | Thi Bui                            | Lora Turpin             | Remove                      |
|            | Refine Search Results                            | Account Code Review - Recruiting       |                         | Thi Bui                            | Lora Turpin             | Remove                      |
| <b>3</b> 9 |  | Banner EH&S HSC - Amarillo             |                         | Thi Bui                            | Lora Turpin             | Remove                      |
| _          | Туре   | Banner EH&S HSC - Lubbock              |                         | Thi Bui                            | Lora Turpin             | Remove                      |
|            | Requisitions ~                                   | Banner HSC Federal Fund 21             |                         | Thi Bui                            | Lora Turpin             | Remove                      |
|            | View Approvals For                               | Banner HSC Purchasing (line limit)     |                         | Thi Bui                            | Lora Turpin             | Remove                      |
| յու        | My Approvals V                                   | Banner HSC Purchasing (line limit) \$0 | .00                     | Thi Bui                            | Lora Turpin             | Remove                      |

#### Removing a Substitute Approver From a Single Folder

To remove a substitute approver from a single folder, locate the appropriate folder and click the **Remove** button in the Action column.

| Banner HSC Henry Schein                 | Lora Turpin |                | Assign |  |
|---|-------------|----------------|--------|--|
| Banner HSC Plant Funds/Bonds Funds - 9H | Lora Turpin |                | Assign |  |
| Banner HSC State Accounts - 10          | Lora Turpin | Click          | Assign |  |
| Banner HSC State Accounts - 12          | Lora Turpin | Remove         | Assign |  |
| Cardinal Ship To                        | Lora Turpin | John Rodriguez | Remove |  |
| Direct Pay with New Supplier            | Lora Turpin |                | Assign |  |
| Fund: 181182-H (Rebates): (All Values)  | Lora Turpin |                | Assign |  |

#### Removing a Substitute Approver From Multiple Folders

To remove a substitute approver from multiple folders, locate the appropriate folders and click the **checkbox** to the right of the Action button and select **Remove**.

|          | TEXAS TECH UNIVERSITY<br>HEALTH SCIENCES CENTER. |  | All 👻 Search (Alt+Q)           | م 0.00 USD 🖢                     | ♡ 🔎 🔺 🛓                         |
|----------|--|--|--------------------------------|----------------------------------|---------------------------------|
|          | Orders  Approvals  Assign Substitute Appro       | vers-Requisitions                      |                                |                                  | -D Logou                        |
|          |  |  | Assign Substitute to All Re    | equisitions Folders End Substitu | te for All Requisitions Folders |
| í.       |  | Showing <b>1 - 20</b> of 106 Results   | All Folder Results             |                                  | Substitution Actions 🔻          |
| 0        | Search Details                                   | Results Per Page 20 V                  | Sort by: Folder name ascending |                                  | I ≥ Page 1 ≥ of 6 ≥ ?           |
| A14      | Filtered by                                      | Folder Name Account Code 7L1890 Review | Select ch                      | eckbox <sup>ii</sup>             | Actic 🗸                         |
| ш        | Type: Requisitions                               | Account Code Review                    | Thi Bui                        | Lora Turpin                      | Remove                          |
| -122     |  | Account Code Review - IT Vendors       | Thi Bui                        | Lora Turpin                      | Remove                          |
|          | Refine Search Results                            | Account Code Review - Recruiting       |                                | Turpin                           | Remove                          |
| <b>3</b> |  | Banner EH&S HSC - Amarillo             | Select Re                      | move 🖳                           | Remove                          |
| _        | Туре   | Banner EH&S HSC - Lubbock              |                                | Turpin                           | Remove                          |
| <b>)</b> | Requisitions                                     | Banner HSC Federal Fund 21             | Thi Bui                        | Lora Turpin                      | Remove                          |

#### Removing a Substitute Approver From All Folders

To remove a substitute approver from all folders, select the **End Substitute for All Requisition Folders** button located above the folder list.

|            | T TEXAS TECH UNIVERSITY<br>HEALTH SCIENCES CENTER. |                                      | All 👻                   | Search (Alt+Q) Q                     | 0.00 USD 📜            | ♡  2                 | <b>1</b>    |
|------------|--|--------------------------------------|-------------------------|--------------------------------------|-----------------------|----------------------|-------------|
|            | Orders + Approvals + Assign Substitute A           | provers-Requisitions                 |                         |                                      |                       |                      | 🕄 Logout    |
| 7          |  |                                      | Assi                    | gn Substitute to All Requisitions Fo | olders End Substitute | e for All Requisitio | ons Folders |
| <b>i</b> c |  | Showing <b>1 - 20</b> of 106 Results | All Folder Result       | s                                    |                       | Substitution A       | Actions 🔻   |
| æ          | Search Details                                     | Results Per Page 20 ~                | Sort by: Folder name as | cending 🗸                            |                       | ▲ Page 1 ∨ o         | of 6 🕨 ?    |
| ATA        |  | Folder Name                          |                         | Approver                             | Substitute            | Action               |             |
| <b></b>    | Filtered by  | Account Code 7L1890 Review           |                         |                                      |                       |                      |             |
|            | Type: Requisitions                                 | Account Code Review                  |                         | Select End                           | Substitu              | ute for              |             |
| 22         |  | Account Code Review - IT Vendors     |                         |                                      | ition Eo              | Idore                |             |
|            | Refine Search Results                              | Account Code Review - Recruiting     |                         | All Keyuls                           |                       | iuei s               |             |
| <b>3</b> 9 |  | Banner EH&S HSC - Amarillo           |                         | THE DAT                              | cora rarpin           | Keniove              | <b></b>     |
|            | Туре   | Banner EH&S HSC - Lubbock            |                         | Thi Bui                              | Lora Turpin           | Remove               |             |

#### **Email Approvals**

You can take action on a requisition directly from an email notification link. The email can be accessed from a desktop or on many mobile devices. You are not required to be logged into TechBuy to take action. You will have the same actions that are available to you in TechBuy including Assign to myself (for later review and action) and Approve.

<u>Note</u>: You may configure Preferred email format to receive either HTML or Plain Text (Defaults to HTML) for all approval emails by accessing your **profile** > **User Profile and Preferences** > **Language, Time Zone and Display Settings** > **Save Changes** 

With Email Approvals enabled, you will receive an enhanced approval email containing pertinent order information and a quick action webpage link where action can be taken. The email contains detailed order information to allow you to make a decision on what action to take on the entire requisition. After reviewing the order details in the email, select the **Take Action** button to access the secure approval webpage.

<u>Note</u>: In order for you to receive the emails, you must have the PR pending Workflow approval email notification enabled. To enable this, access your **profile** > **Notification Preferences** > **Shopping, Carts & Requisitions**, then click **Edit Section**, select **Override, PR pending Workflow approval**, select **Email** from dropdown and click **Save Changes**.





The webpage allows you to select the specific desired action. Possible actions include: **Assign to myself** and **Approve**.

A Comment section is also available to enter a **comment** for the action you have taken. You must enter your **email approval code** and then select **Approve.** 

| Actions         |                     |               |
|-----------------|---------------------|---------------|
| Approval Code * |                     |               |
| Required        | Enter Approval Code |               |
| Comment         |                     |               |
| -               | Enter Comment       |               |
| 0               | Assign to myself    |               |
| 0               | Approve S           | elect Approve |

Once the action is complete, you will receive a confirmation.

<u>Note</u>: You will not be able to approve from email until you have configured an email approval code in your profile. To set up the email approval code, go to **profile** > **Update Security Settings > Change Email Approval Code**. Your email approval code must contain four characters and may be a combination of letters, numbers, and characters.

If you do not set up an email approval code, the enhanced email with order information will not contain the Take Action link. Instead, a warning message will display directing you to TechBuy to take action on the Requisition, as well as to configure your email approval code to take action from future emails.

| Change Email Approval Code<br>Default User Settings | , | Color Theme                           | Texas Tech University | Enter Email Approval |
|---|---|---------------------------------------|-----------------------|----------------------|
|   |   | Enable Accessibility Mode             | Ves No                | Code                 |
|   |   | Help on mouse over                    | Change Email A        | Approval Code ×      |
|   |   | Preferred email format                | Email Approval Code   |                      |
|   |   | Access Training Content Configuration |                       |                      |
|   |   | Home Page Click Sav                   | e Changes             | Save Changes Close   |

The action is logged in History as having been taken via email.

| Results Pe | er Page 20 🗸         |         |                        | Records found: 2     | 8 |           |      | I Page 1 ∨ c | of 2 🕨 ? |
|------------|----------------------|---------|------------------------|----------------------|---|-----------|------|--------------|----------|
| Line<br>No | Date/Time 🔻          | User 🗠  | Step(s)                | Action               |   | Action    | From | То           | Note     |
|            | 9/10/2020<br>2:07 PM | Thi Bui | Banner FOAPAL Approval | Requisition approved |   | logged in |      |              |          |
|            | 9/10/2020<br>1:35 PM | Thi Bui | Banner FOAPAL Approval | Requisition assigned |   | History   |      |              |          |
|            | 9/10/2020<br>1:35 PM | System  | Budget Authorization   | Requisition approved |   |           |      |              |          |

The action is logged in Comments. The Comments are also logged in Comments.

| Requisition PF Acti  | on logged in<br>Comments | بر بر میں |
|--|--------------------------|---|
| Records found: 1   |                          | ?   |
| Thi Bui<br>Applies To: Requisition - 1357<br>Comment Added - 9/10/2020 2:08 PM | Comments logged          | [Remove]                                      |
| Order Approved.  | in Comments              |   |

### **Enhanced Approval Email Notification**

If you are not set up for Email Approvals, you can still receive enhanced email notifications that include detailed information for requisitions. Once configured, you will receive the enhanced email notification containing detailed information without the Take Action link. The enhanced email does include a link; **Click here to view the document in your organization's site**, allowing you to take action as normal on the requisition in TechBuy.

| Line and Header FOAP Summary  |  |
|---|--|
| Chart:<br>Fund:<br>Organization:<br>Account:<br>Program:<br>Activity:   | H - TX Tech Univ Hith Sciences Ctr<br>181182-H - Rebates<br>201181-H - Purchasing Lbk<br>729900-H - OC Purchased Contracted Services<br>60-H - Institutional Support |
| Additional In   | formation  |
| Summary Details<br>Purchase Order<br>Classification:<br>Hindipal Investigator<br>LBB Field:<br>Event Title:<br>Export to Sourcing<br>Manager:<br>Buyer Phone<br>Number:<br>Cardinal Account<br>Code:<br>Comments:<br>Other Possible A<br>Atton Taylor<br>Terry Dalton | r.<br>None<br>21034961 - PSYCHIATRY TTUHSC RM 4A161<br>(0)<br>Approvers  |
| Shipping Address<br>Contact Name John Haynes<br>Phone<br>Email John o havnes@tlubsc.edu<br>Tx Tech Univ HSC<br>1300 COULTER<br>Rm/Euliding test1<br>AMARILLO, TX 79106<br>United States   |  |
| Click here to view the  | e document in your organization's site.  |

<u>Note</u>: In order for you to receive the emails, you must have the PR pending Workflow approval email notification enabled. To enable this, access your **profile** > **Notification Preferences** > **Shopping, Carts & Requisitions**, then click **Edit Section**, select **Override, PR pending Workflow approval**, select **Email** from the dropdown and click **Save Changes**.