TIGER BUY

AUBURN UNIVERSITY
Procurement and Business Services

Table of Contents

Requisition/PO Inquiry and Change Requests

Auburn University
TigerBuy

Quick Reference Guide

AUBURN UNIVERSITY
Procurement and Business Services

Overview
Auburn University's TigerBuy is a web-based eProcurement platform that transforms several manual procurement processes into a single, unified electronic procurement process. Tigerbuy is a one-stop shop for requisitions, purchase orders, electronic approvals, and invoice payment.

**Please note that Jaggaer updates three times a year. The overall look of TigerBuy will change slightly and at times button placement may vary. Significant changes will be edited to these guides which can be found on our website and the TigerBuy shopping homepage.

Learning Objectives
The goal of this reference guide is to reinforce the following training objectives:
- Learn about the benefits TigerBuy will bring to Procue-to-Pay process.
- Understand TigerBuy user interface and functionality.
- Understand and differentiate TigerBuy roles and responsibilities.
- Recognize the capabilities and considerations for each role.
- Learn enhanced TigerBuy functionality through Frequently Asked Questions.

Benefits of TigerBuy
Efficiencies
- Eliminates duplicate entry and rework.
- One system to accomplish most procurement and accounts payable activities.

Ease of Use
- Catalog content available with TigerBuy preferred pricing.
- Catalog and non-catalog orders in the same system

Visibility
- Online history-all purchasing and payment information in one place.
- Data export capability
- Insight into purchasing trends across all segments of the institution.

Compliance
- Automated workflow makes compliance simpler.
- Departments can define their own workflow and compliance elements with institutionally mandated elements.

Speed
- Orders are electronically sent to the supplier as soon as approval steps are complete.
- Orders dispatched to vendors in real-time.

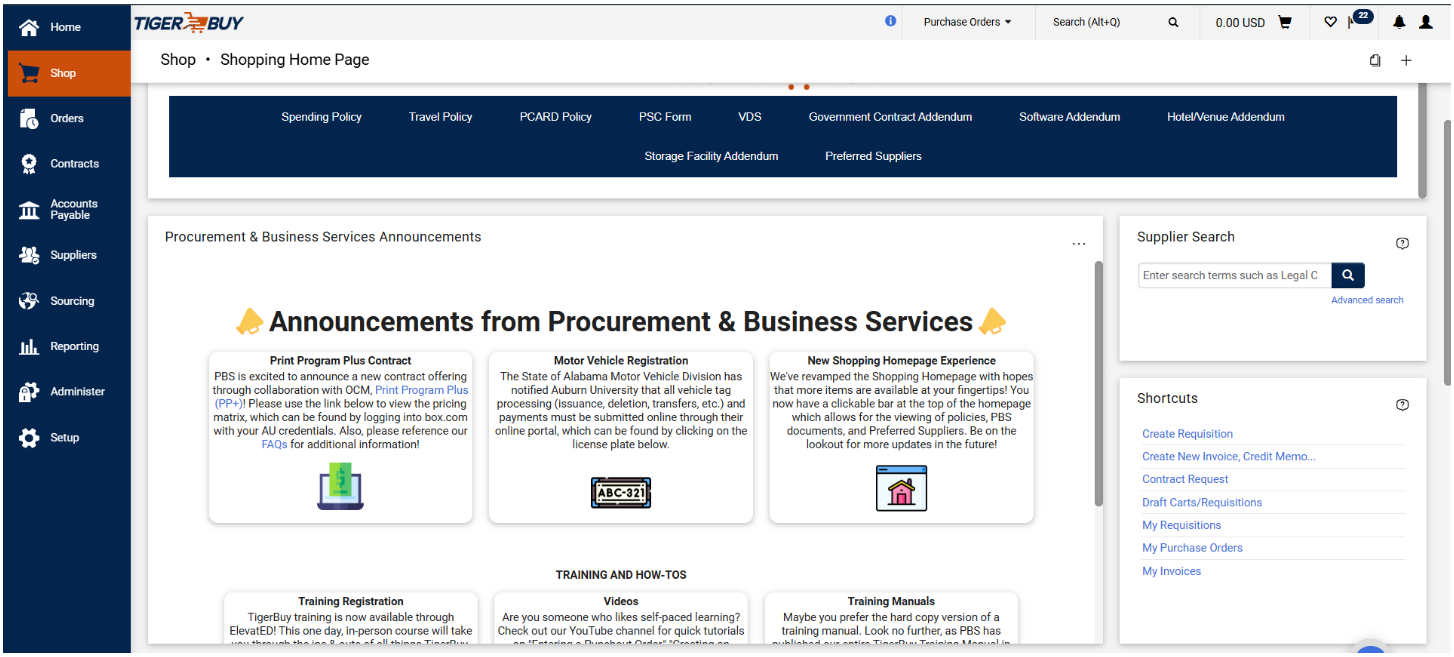
Cost Savings
- On-contract spend
- Increased spend visibility will lead to better supplier pricing.

Communication
- Use of internal notes, comment, and attachments to others processing the purchase
- Use of external notes to communicate with suppliers, which are enabled to receive such communication

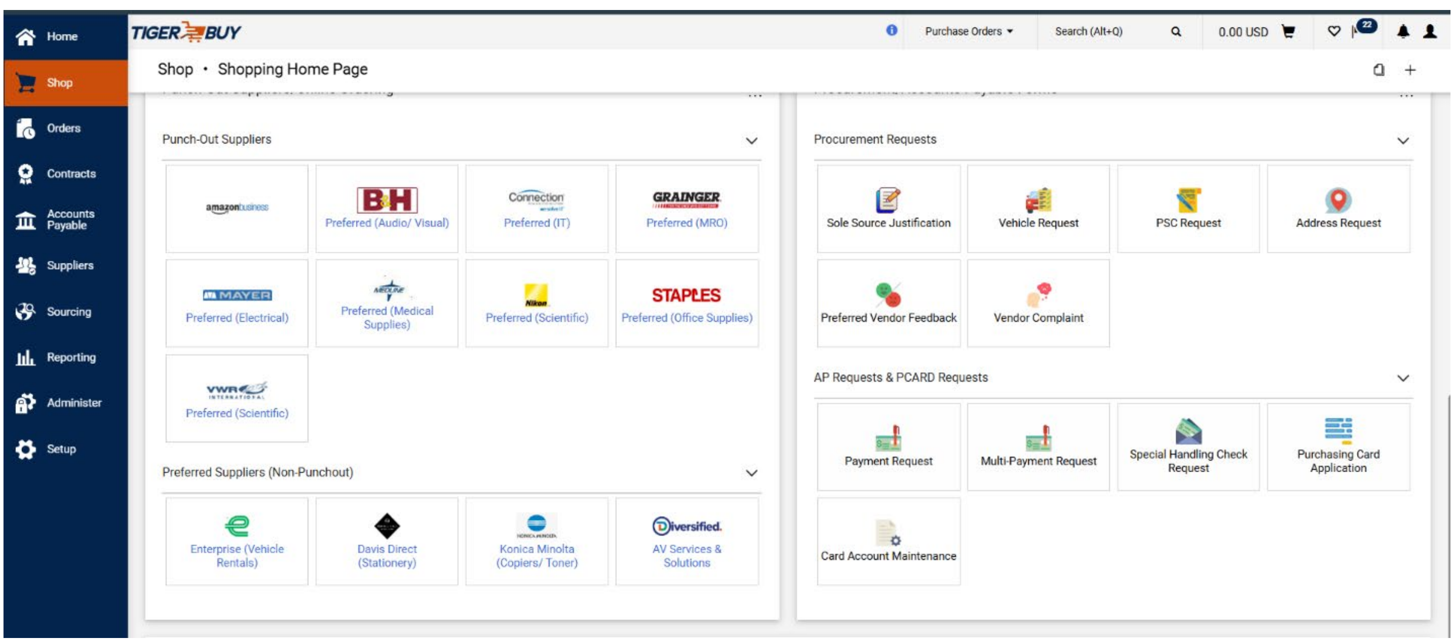
What's New and Different Overview

Previous Method	New Method
Purchase goods and services from external supplier websites	Most goods and services will be purchased using AU's TigerBuy eProcurement platform
Check requests and most paper vouchers originated via Banner	Check requests will be submitted using TigerBuy via Check Request form
Unautomated and manual workflow process	Automated and dynamic workflow process
Approvals in SSB	Mobile Application- Approvals can be made from your desktop or through Jaggaer app on your phone/device

TigerBuy Homepage (Top Half)



TigerBuy Homepage (Bottom Half)



Key Definitions

SYSTEM DOCUMENTS

SHOPPING ITEMS

SYSTEM USERS

Cart: A cart holds details about the item(s) or services that you are ordering. Carts are draft entities; they do not become actual orders until they are submitted. Once the cart has been submitted, it becomes a Purchase Requisition.

Purchase Requisition: Requisitions are referred to as Purchase Requisition. Purchase Requisitions in TigerBuy have an approval process (workflow) that requires that the Purchase Requisition be reviewed/approved. Once a Purchase Requisition is fully approved and complete, it becomes a Purchase Order.

Purchase Order (PO): A Purchase Order is a binding contract to purchase goods or services. POs are distributed to Suppliers in TigerBuy via cXML, Fax, or email.

Invoice: Invoices in TigerBuy are based on PO purchases. Invoices are subject to tolerance requirements related to the PO and Receipt. Once an invoice is fully approved and complete, it will be marked as “Ok to Pay” and exported to Banner for payment.

Punch-Out: From TigerBuy, you can click on Supplier Logos to go to a Supplier’s site to shop. This experience is very similar to shopping directly from a Supplier’s website except that the vendor typically tailors to the external catalog to items/prices specific to UDC. After shopping from a vendor punch-out, the items are returned to the TigerBuy cart.

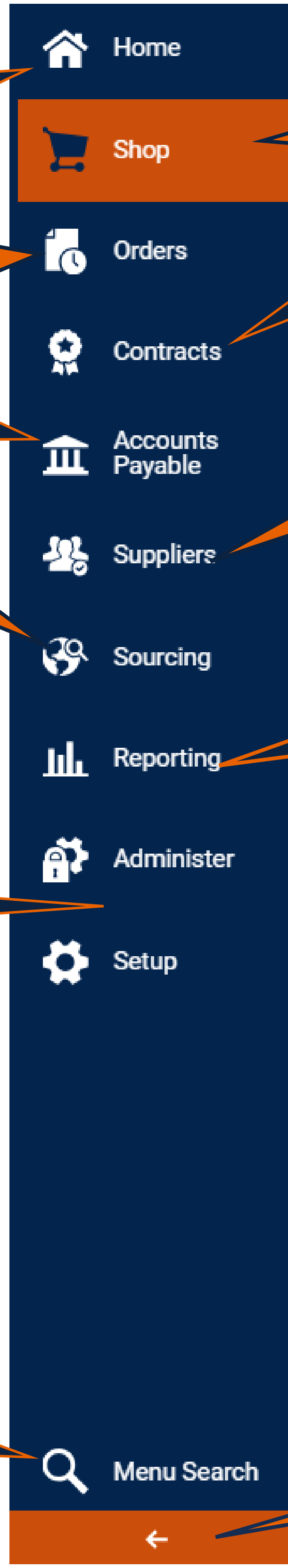
Non-Catalog Items: A non-catalog order indicates the item is not available via a Punch-Out catalog. TigerBuy has no pricing for the item being requested and it is the User’s responsibility to accurately describe and price the item.

Forms: On TigerBuy, a form is merely an “electronic” version of a paper form, which can be filled out, added to a Cart, and submitted. It can have fields that are required as well as attachments.

Requestor: Adds orders to their Cart and submits or assigns their Carts for processing.

Approver(s): Department, Budgeting, Procurement, etc. Approvers will approve Purchase Requisitions based on specific criteria that has been determined for routing the Requisition.

Side Navigation Menu



The **Home** icon provides quick access to the main shopping page.

The **Shop** icon provides quick access to the shopping options and carts.

The **Orders** section allows you to search for requisitions, purchase orders, and invoices.

The **Contracts** section allows you to search for and view University Contracts

The **Accounts Payable** section allows you to view invoice information.

The Suppliers section allows you to

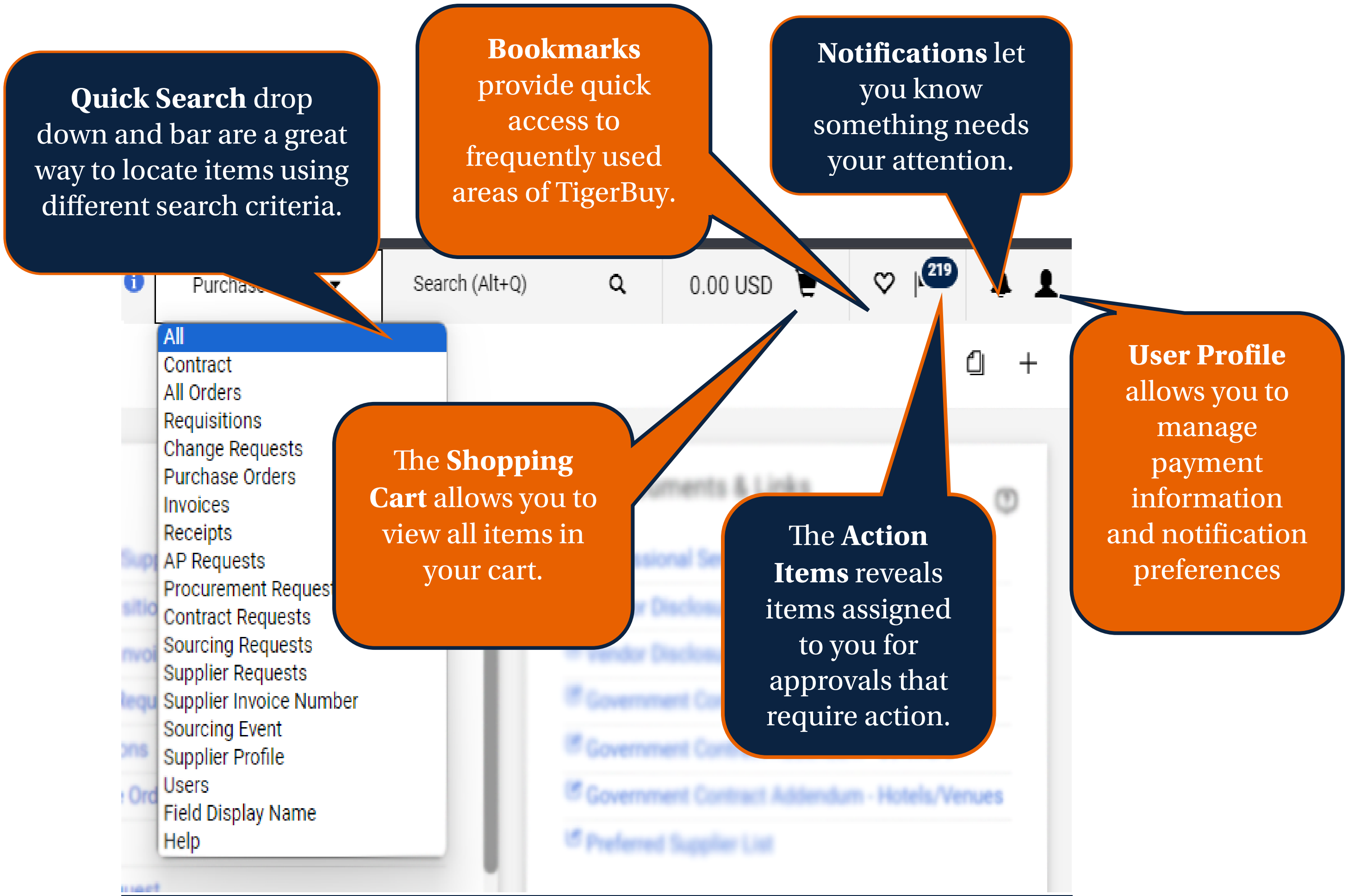
The **Sourcing** section allows you to view sourcing events.

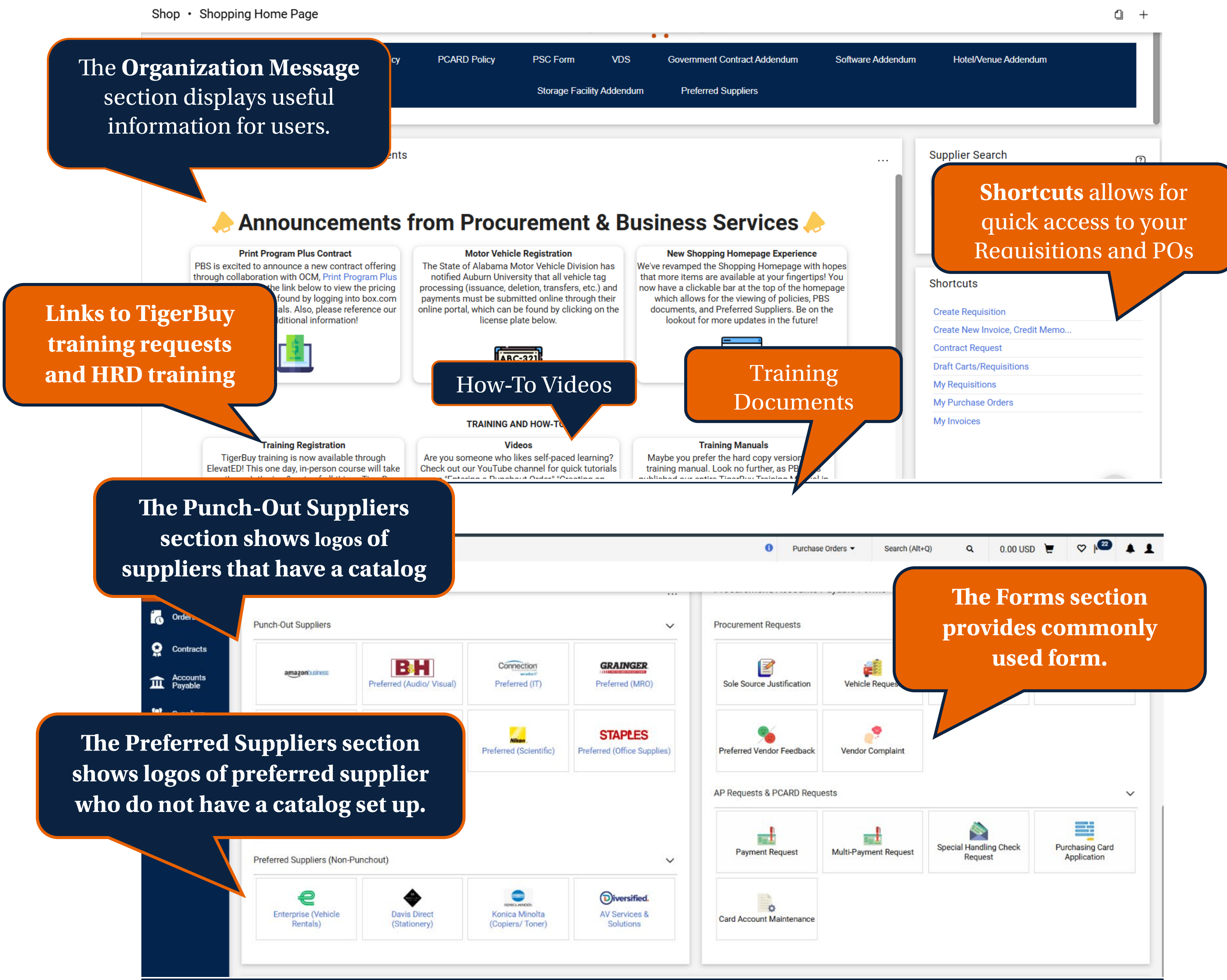
The **Reporting** section allows you to access reports based on your role.

The **Administer** and **Setup** Sections are for Admin use only.

The Menu Search section allows you to search the system.

Quick Tip: To hide or see icon names, click the arrow accordingly.


Quick Search drop down and bar are a great way to locate items using different search criteria.
Bookmarks provide quick access to frequently used areas of TigerBuy.
Notifications let you know something needs your attention.
Purchase
Search (Alt+Q)
0.00 USD
219
All
Contract
All Orders
Requisitions
Change Requests
Purchase Orders
Invoices
Receipts
AP Requests
Procurement Request
Contract Requests
Sourcing Requests
Supplier Requests
Supplier Invoice Number
Sourcing Event
Supplier Profile
Users
Field Display Name
Help
The **Shopping Cart** allows you to view all items in your cart.
The **Action Items** reveals items assigned to you for approvals that require action.
User Profile allows you to manage payment information and notification preferences


Shop • Shopping Home Page
The Organization Message section displays useful information for users.
PCARD Policy
PSC Form
VDS
Government Contract Addendum
Software Addendum
Hotel/Venue Addendum
Storage Facility Addendum
Preferred Suppliers
Supplier Search
Shortcuts allows for quick access to your Requisitions and POs
Announcements from Procurement & Business Services
Print Program Plus Contract
Motor Vehicle Registration
The State of Alabama Motor Vehicle Division has notified Auburn University that all vehicle tag processing (issuance, deletion, transfers, etc.) and payments must be submitted online through their online portal, which can be found by clicking on the license plate below.
New Shopping Homepage Experience
We've revamped the Shopping Homepage with hopes that more items are available at your fingertips! You now have a clickable bar at the top of the homepage which allows for the viewing of policies, PBS documents, and Preferred Suppliers. Be on the lookout for more updates in the future!
Links to TigerBuy training requests and HRD training
How-To Videos
Training Documents
Shortcuts
Create Requisition
Create New Invoice, Credit Memo...
Contract Request
Draft Carts/Requisitions
My Requisitions
My Purchase Orders
My Invoices
Training Registration
Videos
Training Manuals
The Punch-Out Suppliers section shows logos of suppliers that have a catalog
Purchase Orders
Search (Alt+Q)
0.00 USD
Contracts
Accounts Payable
Punch-Out Suppliers
Preferred (Audio/ Visual)
Preferred (IT)
Preferred (MRO)
Preferred (Scientific)
Preferred (Office Supplies)
Procurement Requests
Sole Source Justification
Preferred Vendor Feedback
Vendor Complaint
The Forms section provides commonly used form.
AP Requests & PCARD Requests
Payment Request
Multi-Payment Request
Special Handling Check Request
Purchasing Card Application
Card Account Maintenance
The Preferred Suppliers section shows logos of preferred supplier who do not have a catalog set up.
Preferred Suppliers (Non-Punchout)
Enterprise (Vehicle Rentals)
Davis Direct (Stationery)
Konica Minolta (Copiers/ Toner)
AV Services & Solutions

FAQ (Frequently Asked Questions)

What is TigerBuy?
Tiger Buy is a web-based eProcurement platform that provides an all-in-one solution for procure-to-pay processes.

Who can use TigerBuy?
All individuals that are active employees at Auburn University & AUM will be able to access TigerBuy using their AU Access credentials. This includes all faculty, staff, and students with either a part time or full-time assignment.

How do I use TigerBuy?
TigerBuy has various roles with different responsibilities. Training sessions are offered to provide end users with hands-on training for the full shopping experience and to take advantage of the efficiencies the system can offer.

Can I use Banner to create check requests and/or purchase orders?
As the University transitions to TigerBuy, end users will no longer be able to process check requests or purchase orders in other systems outside of TigerBuy.

Can I access TigerBuy off-campus?
Do I need to remote into my computer? TigerBuy is a web-based eProcurement system that has mobile application and can be accessed using the Jaggaer app. and your university user credentials from any device with web access.

What is a showcased supplier?
A showcased supplier is a preferred supplier. Showcased supplier catalogs are accessible directly in TigerBuy as a "punch-out" catalog.

I am looking for a supplier that is not available in TigerBuy. How do I purchase from that supplier?
You can direct the supplier to register in our supplier portal at www.aub.ie/supplier.

Is there a file size limit when uploading attachments?
Yes. Attachments cannot exceed 10MB.

Can I order from different suppliers using the same cart?
No. You cannot order from different suppliers using one cart. A new cart must be created for each supplier.

How do I search for orders?
TigerBuy has two (2) ways to search for documents. You can use the magnifying glass located at the upper right-hand corner or you can use the Orders icon on the left-hand side.

How do I approve/reject/return a cart/requisition?
As an approver, you have the option to approve, reject, or return a requisition. In order to take action, you must first "assign" the request to yourself. Once assigned, you will have the option to approve/reject.

How will I pay for my punch-out orders?
Users are required to use his/her personal P-card. Single transaction limit will be reviewed and raised as needed.

Requisitions

Can I cancel a requisition after it has been submitted?
Yes. Conduct a document search specifically searching for requisitions and navigate to your requisition. Select 'withdraw' from the available actions drop-down menu. Please note: the requisition may be in the process of being reviewed by an Approver; to limit confusion, it is advised that the Approver be contacted prior to withdrawing the requisition.

How do I enter my account codes?
In TigerBuy, account codes require an '–A' to show that they are associated with Chart A funds. Please note: For requisitions, only Chart A should be used.

Can I add multiple accounting codes to one requisition?
Yes. Please refer to the Requisition Creation user training guide, Section 3.6 for information on how to split accounting codes.

How can I determine where my requisition is within approval queues?
Access the Document Search icon, searching specifically for 'Requisitions.' Click the desired requisition number, then the 'History' tab from the requisition summary page.

Can I determine when my requisition was approved and by whom?
Yes. Conduct a document search specifically searching for requisitions. Click the desired requisition number, then the 'History' tab from the requisition summary page. Each step of the requisition's history is time/date stamped, including approval history.

What is a Non-Catalog request?
A Non-Catalog request is a free form requisition that allows the user to enter in product information including description, catalog number, quantity, and price. Non-Catalog requests are typically used for service-related orders or unique goods that are not available through punch-out suppliers.

When should I use a form?
Forms have been designed to simplify certain types of requests. Each form has a description in the header (as well as by hovering over the form with your mouse) to define proper use.

Purchase Orders

Will I receive notification when my purchase order has been delivered to the supplier?
Yes. A 'PO sent to supplier' notification will be emailed to the Requisitioner after successful transmission of the PO has been achieved.

How do I edit the purchase order?
If a requisition has been submitted and a purchase order has been created, any changes to the purchase order must be requested via a change request.

How can I retrieve a copy of the purchase order?
Perform a document search specifically searching for purchase orders. Once the results are shown, click the desired requisition number, and click 'Print Purchase Order' in the available actions drop-down menu. Please note: purchase orders are automatically routed to the supplier. DO NOT print a purchase order to redistribute to the supplier; otherwise, you risk order duplication.

What are the different methods that a purchase order can be distributed to a supplier?
A purchase order can be distributed via email or cXML (for enabled suppliers). Distribution methods are determined by the supplier contact information and/or requisition specific instructions.

What is Purchasing Category?
This is where you will choose the category for the item(s) you are purchasing (i.e., Office Supplies, books…). This is important as all routing will be based on the purchasing category.

Can I do a Change Request on a punch-out order?
No. The punch-out suppliers do not accept change requests for orders placed in TigerBuy.

Approvals

Can I edit a requisition that has entered my approval queue?
Yes. However, be aware changes to the account code information will NOT re-route to departmental approvers that were not included in previous approval levels. If account code changes are needed, it is recommended that the requisition be returned, corrected, and re-submit to invoke the appropriate departmental approvals.

How do I add an individual or make changes to my approval queue?
Changes to approval queues should continue to be requested through the 'Administrative Security Request System' found on the 'Employee' tab of Self-Service.

If I am an approver for multiple departments, how do I manage all the incoming requisitions?
Incoming requisitions will be deposited into separate departmental approval folders to allow you to independently review and manage requests coming from different departments. You can further refine your approval queue using the 'Filter' options adjacent to the approval folders.

When and why do I need to "Assign a requisition to myself?
A requisition can be approved without assigning the requisition. However, assigning a requisition is required when the request needs to be rejected, returned, or placed on hold. The act of assigning the requisition allows you to take ownership of the requisition and prohibit any other approvers from unknowingly approving a requisition that you are reviewing.

What is the difference between returning a requisition and rejecting a requisition?
Returning a requisition allows the Requestor to make edits and resubmit the request using the same requisition number. Rejecting a requisition cancels the requests and no further edits are allowed. A rejected requisition can be copied to a new cart, but a new requisition number will be assigned. Rejections should be reserved for inappropriate request for goods and services or budget concerns.

Can I place a requisition on hold while I evaluate the applicability and/or collecting additional information for the requests without having to return or reject it?
Yes. A requisition can be placed on hold instead of returning the requisition. Comments can be added directly to the requisition to request clarification and/or support documentation without unnecessarily returning the requisition and re-routing through approvals.

Document Visibility

Why can't I see/access a requisition/purchase order/invoice/receiver from my school/college/department?
Document visibility is based on your TigerBuy role and your assigned department within your user profile.

- Requisitioners have access to view documents they participated with (e.g., submitted requisition), as well as all department related activity.
- Approvers have access to view documents they participated with (e.g., approved requisitions), as well as all department-related activity.

Invoice Matching

What is the process for invoice matching?
Most invoices are matched by price and quantity - this is a "two-way match." If a three-way match is required, the department that requested and received the order must submit an online receipt.

The three-way match is established by comparing the following:

- The receiving report that contains the item(s) description, quantity, and price and that has been signed as received by the end user
- The purchase order data from TigerBuy
- The invoice from the vendor

A two-way match is conducted when there is no receiving report. The two-way match is established by comparing the following:

- The purchase order data from TigerBuy
- The invoice from the vendor

How will invoicing and payment be handled when I purchase from TigerBuy suppliers?
Most TigerBuy punch-out suppliers will submit invoices electronically. The two-way or three-way matches, referenced above, will be executed, and successful matches will automatically trigger payment.

Purchasing Categories

Category#	Category Name
101	Advertisements
102	Aggregate Materials
103	Animals
104	Apparel
105	Appliances
106	Art (Statues, paintings, exhibits)
107	Audio Visual
108	Automotive Parts
109	Aviation (Fuel, parts, aircraft)
110	Awards (Cords, robes, letterman awards)
111	Books, publications
112	Building Supplies
113	Catering
114	Cellular Equipment, Services, & Supplies
115	Chemicals, solvents
116	Construction/Public Works
117	Custodial/Janitorial Services
118	Educational Materials
119	Electrical Supplies
120	Elevator Supplies & Maintenance
121	Engineering Equipment
122	Environmental & Ecological Services
123	Equipment Maintenance
124	Event Staging
125	Feed & Fertilizer
126	Financial Services
127	Fire Protection, Equipment, Supplies, & Services
128	Flooring
129	Food (not catering services or restaurants)
130	Forestry Services
131	Fuel & Lubricants
132	Furniture (Chairs, draperies, furnishings)
133	Health Related Services (Drug testing, counseling, physical therapy)
134	Heavy Equipment (Rental/purchase, agricultural, construction, implements)
135	HVAC Parts & Supplies
136	Insurance

Category#	Category Name (Continued)
137	IT (Peripherals, AV equipment, copiers, multi-functional devices, printers, software, & hardware)
138	Landscaping Equipment (Rental & purchase)
139	Landscaping services
140	Lodging
141	Mail equipment & supplies
142	Medical supplies & Equipment
143	Miscellaneous Services
144	MRO (Janitorial supplies, paint, piping, tubing)
145	Musical Instruments
146	Office Supplies
147	Parks & Recreational Equipment
148	Pest Control Services
149	Pharmaceuticals, Equipment, & Supplies
150	Plumbing Services
151	Printing Services
152	Professional Services (Architectural, Engineering, Consulting)
153	Promotional Items
154	Real Estate
155	Restaurant Equipment (Appliances, small wares)
156	Scientific Equipment, Furnishings, & Supplies
157	Security Equipment & Services
158	Shipping Equipment, Services, & Supplies (Material handling, packaging)
159	Speakers
160	Sporting Goods & Equipment
161	Theatrical Equipment & Supplies
162	Transportation Equipment & Services (Charter buses, charter flights, hauling)
163	Uniforms (Rental, purchase)
164	Utilities (Power, water, telecom, internet, & cable)
165	Vehicles (Rental, purchase. Lease/cars, trucks, utility, golf carts, marine)
166	Veterinary Equipment & Supplies
167	Waste Removal, Recycling Services, & Supplies

Important Contact Information:

Supplier Portal: https://aub.ie/supplier
TigerBuy Portal: https://aub.ie/tigerbuy
Bid Calendar: https://aub.ie/bids

tigerbuy@auburn.edu
auprocure@auburn.edu
supplierhelp@auburn.edu

TigerBuy Terminology Crosswalk

TigerBuy Terms	Cross Reference
Supplier Portal / TSM	Vendor Center
Supplier	Vendor
Sourcing Event	Bid/RFP
Sourcing Specialist	Buyer/Strategic Sourcing Analyst
Change Request	Purchase Change Order (PCO)
Requisitioner	Preparer
Punchout Orders & Non – Catalog Orders	Requisition
Invoice	Vendor Voucher
Punchout Supplier	Supplier who has their own website, which is accessed by "punching out" to their site. Users then return to TigerBuy with shopped items intact.

Additional Information

With the transition to TigerBuy, **ALL** allowable purchases are now requisitions (orders), regardless of the amount. For transactions less than $5K, a PCARD may be used as the method of payment. If a card is entered within the billing section of the requisition, the order will be sent directly to the supplier upon completion. A **"CC"** number will be assigned to any orders paid via PCARD. For orders that are greater than or equal to $5K, the normal requisition workflow will take place with the departmental approval and PBS approval being triggered. As with our previous eReq process, a Banner PO number will be assigned upon completion of the workflow process.

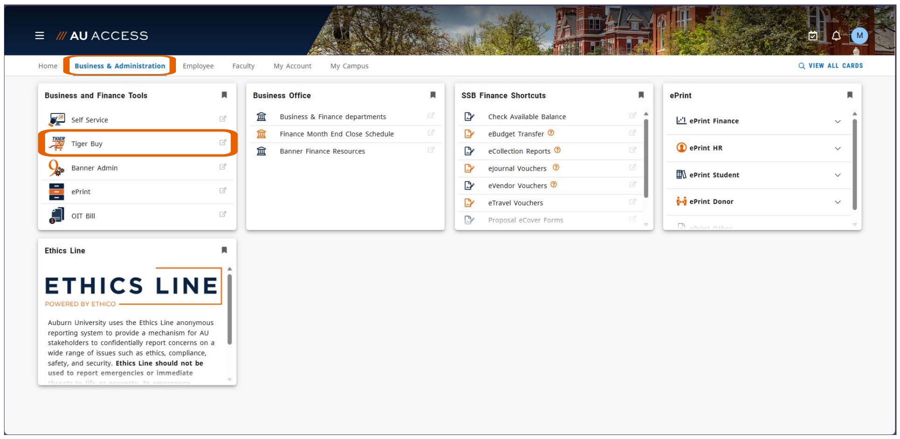
Auburn University
TigerBuy

Module 1: Customizing User Profiles

1.0 Signing in to TigerBuy

Target Audience: **All**

1. Log in to your AU usiness
2. Select the **Business & Administration** tab at the top of the screen. Next, select the **TigerBuy** button located in the **Business and Finance Tools** card..



3. Once logged in, the role(s) and permissions assigned to the user to dictate what screens are visible and what functions are accessible.

What's My Profile?

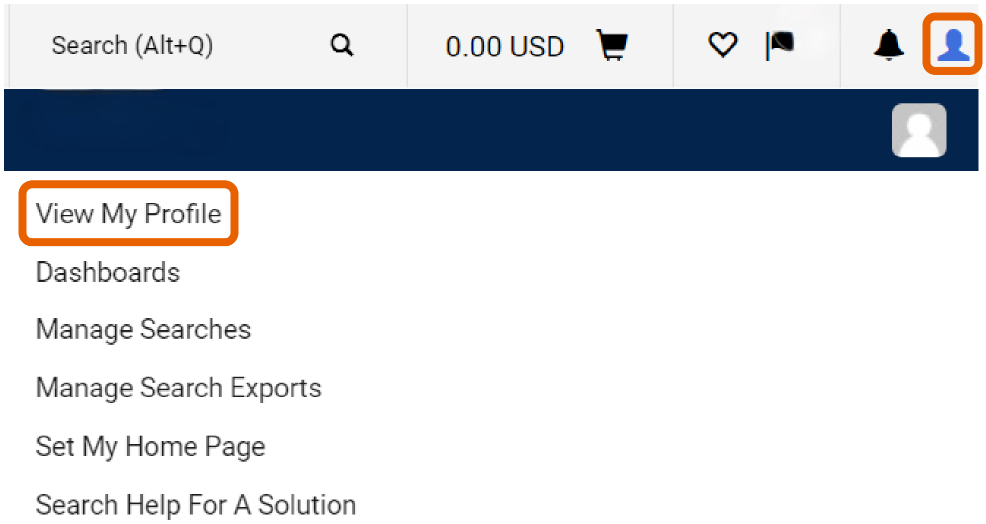
Profiles in TigerBuy allow you to make the buying and paying process more efficient and customize your user experience by allowing you to save default information, shipping addresses, frequently used FOAPs, cart assignees, notification preferences, and email approval options. Note: Some of the values in your profile are maintained by the system administrators and cannot be changed. These include user roles, permissions, order settings, and approval settings.

1.1 Setting Default Accounting Code Favorites

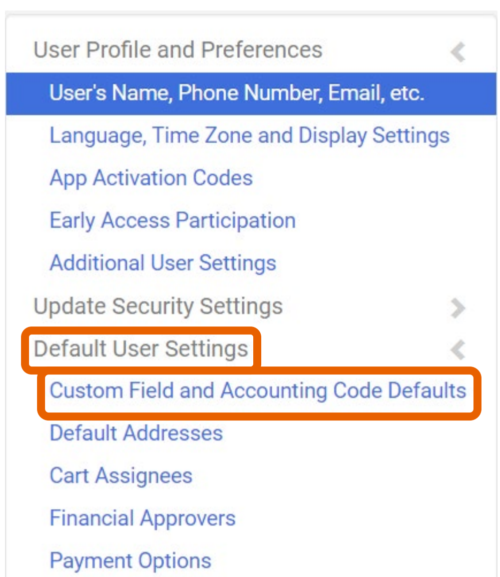
Target Audience: **Requisitioner**

Users can set default accounting codes for TigerBuy purchases. To select default accounting codes, sign into TigerBuy using your AU Access credentials.

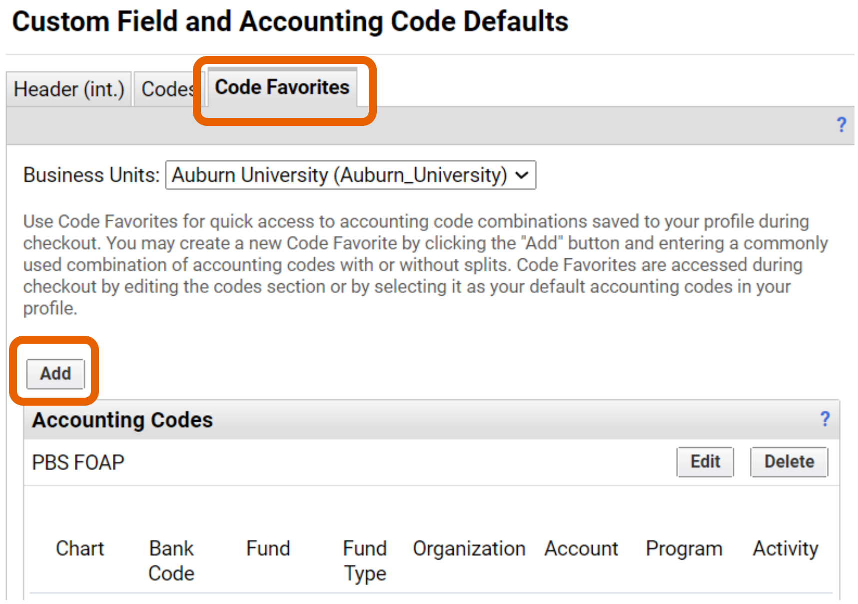
1. From the TigerBuy homepage, select the icon in the dashboard located in the top right corner and select **View My Profile** from the menu.



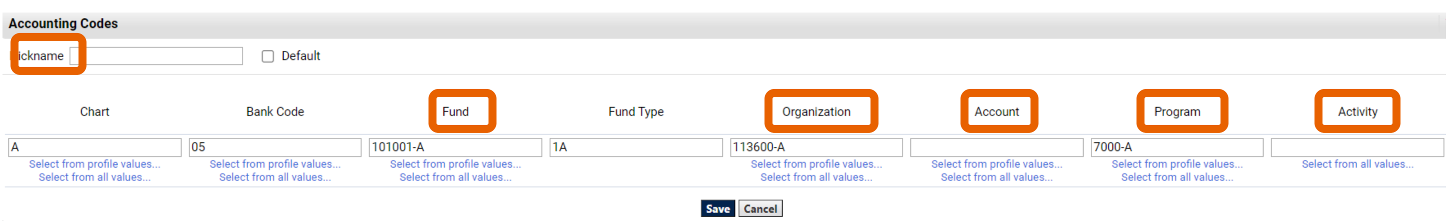
2. From **Default User Settings**, select **Custom Field** and **Accounting Code Defaults**.



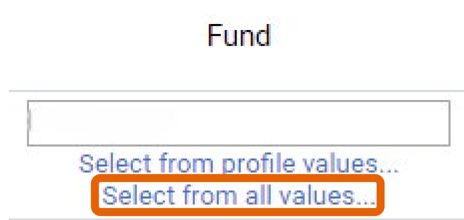
3. The **Custom Field** and **Account Code Defaults** page will appear. From there, select **Code Favorites**. Within the dialog box, select **Add**.



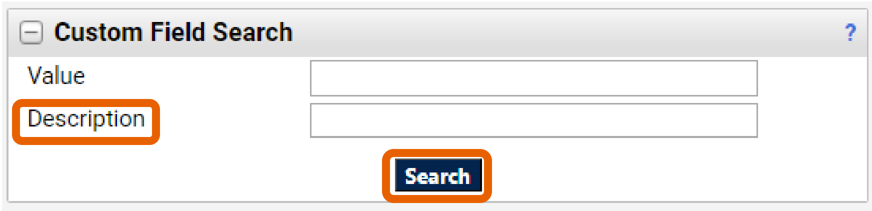
4. The following fields are available for data entry: ***Nickname, Fund, Organization, Account, Program, and Activity***. Decide on a nickname for the **Accounting Code** you are selecting. You can also identify the string as a default for all ordering activity.



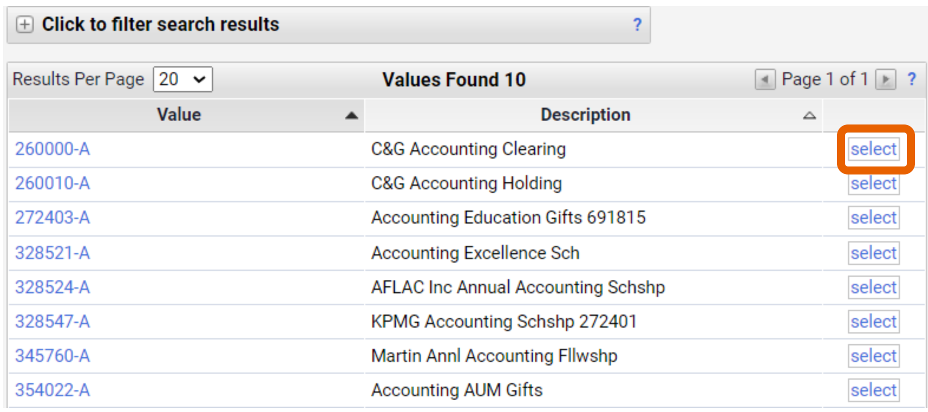
5. If you are unsure of the Fund, Organization, Account, Program, or Activity use codes, choose the **Select from all values** link for value options.



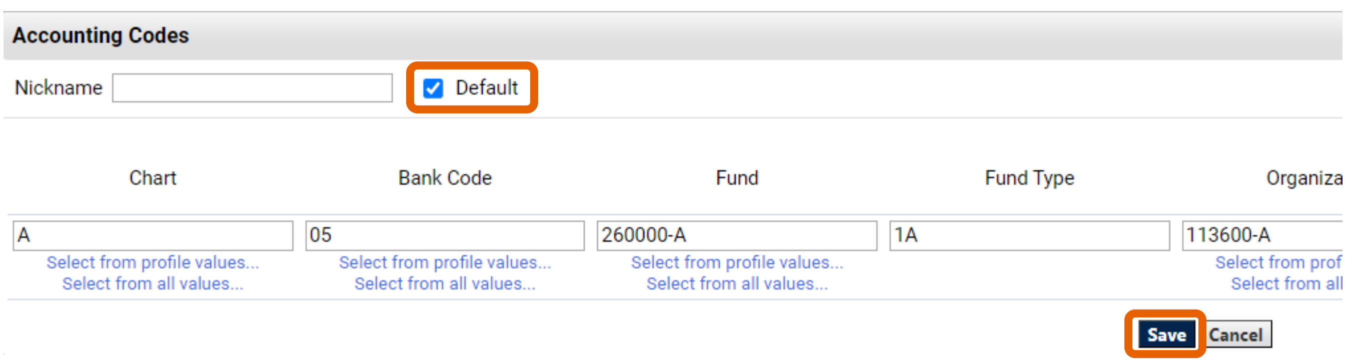
6. A **Custom Field Search** dialog box will appear. Enter a description for the code you are searching for and select **Search**.



7. A list of values will appear in another dialog box. **Select** the appropriate value.



8. Follow the same steps until all fields are selected, check the **Default** box, and select **Save**.

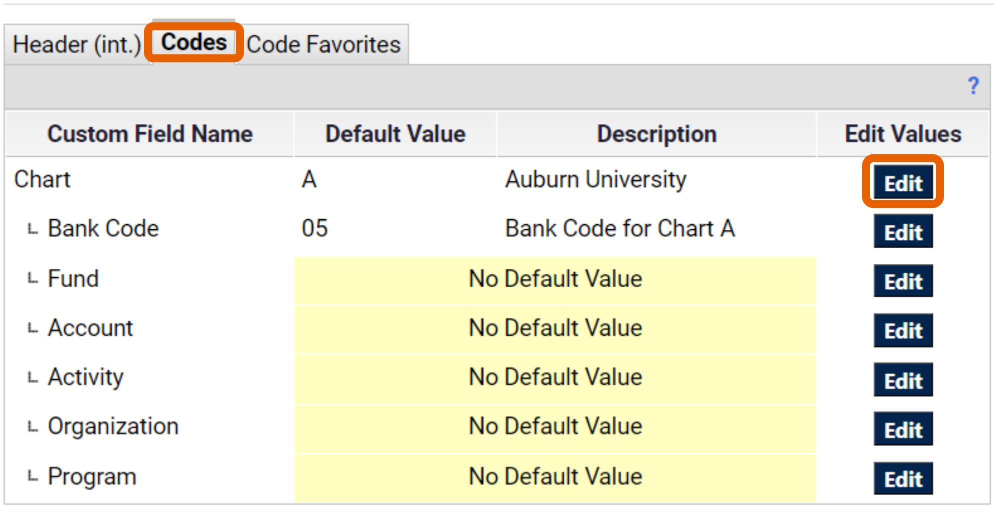


1.2 Entering Default Accounting Codes to Your Profile

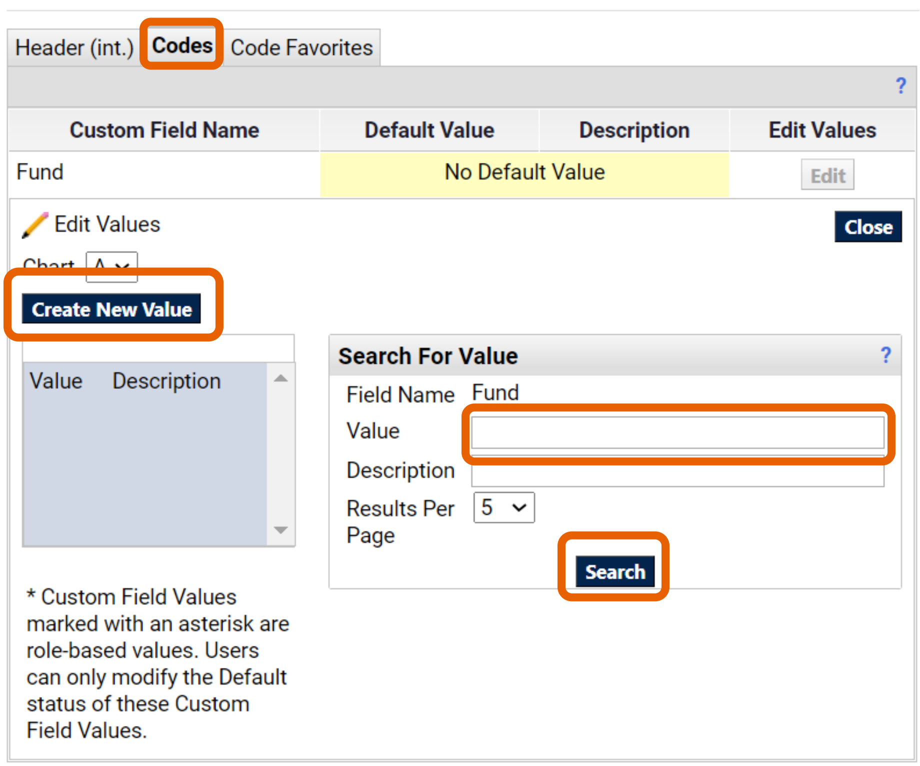
Target Audience: **Requisitioner/Approver**

Depending on your role, access, and permission in TigerBuy, you may have the ability to enter accounting codes to your profile other than the default accounting code provided by the AU System Administrator. The Shopper/Requisitioner role will not have the ability to add other default accounting codes. This module only applies to the Sourcing Analyst role.

1. From **Default User Settings**, select **Custom Field and Accounting Code Defaults**, then **Codes**.
2. Within this menu, you have the option of defaulting ***Fund, Account, Organization, program, and Activity***. Be selective in what accounting values should be used, as these values default for every order. Select **Edit** on the respective chart field component.



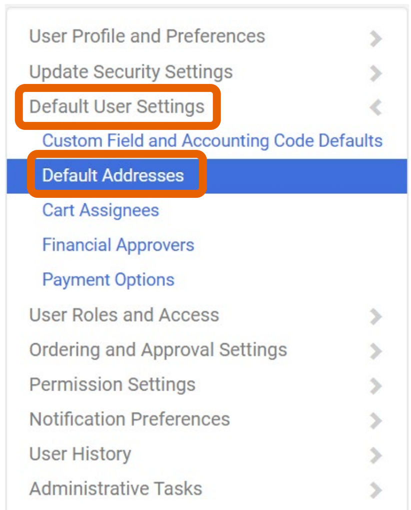
3. Within the **Codes** tab, select **Create New Value**. Within the **Search for Value** section, use the **Value** field to search for a specific value or **Description** field to search for a term associated with the value (e.g. President) and select **Search**.



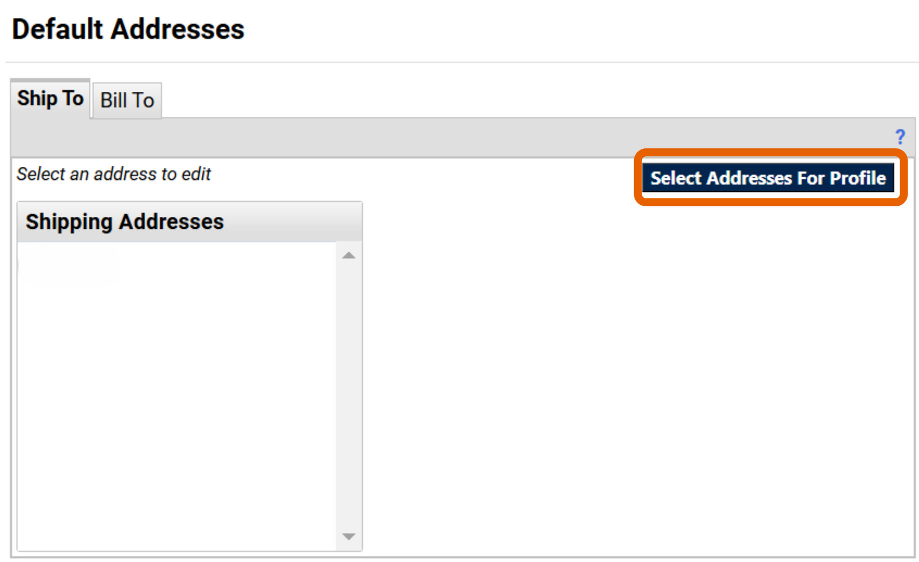
1.3 Entering Default Shipping Address

Target Audience: **Requisitioner**

1. From the TigerBuy home page, select the icon in the dashboard located in the top right and select **View My Profile** from the menu.
2. From **Default User Settings**, select **Default Addresses**.

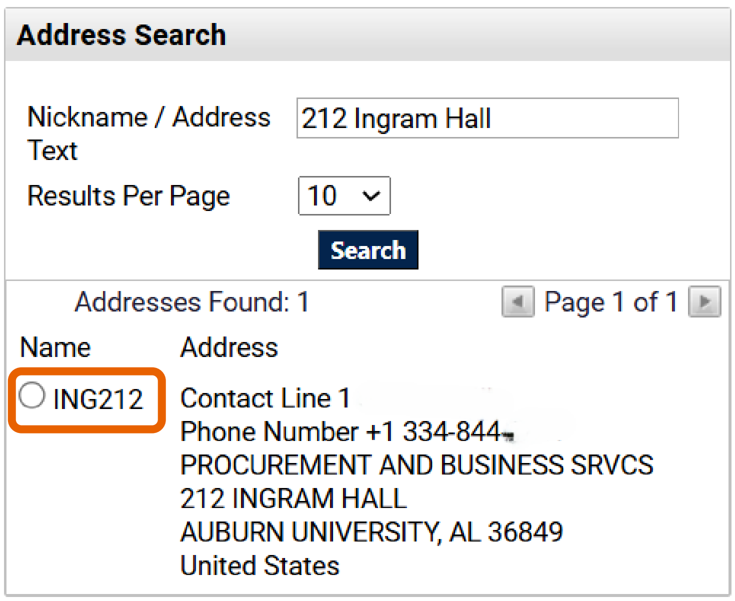


3. The **Default Addresses** page will appear. In the **Ship To** tab, select the **Select Addresses** for Profile button.

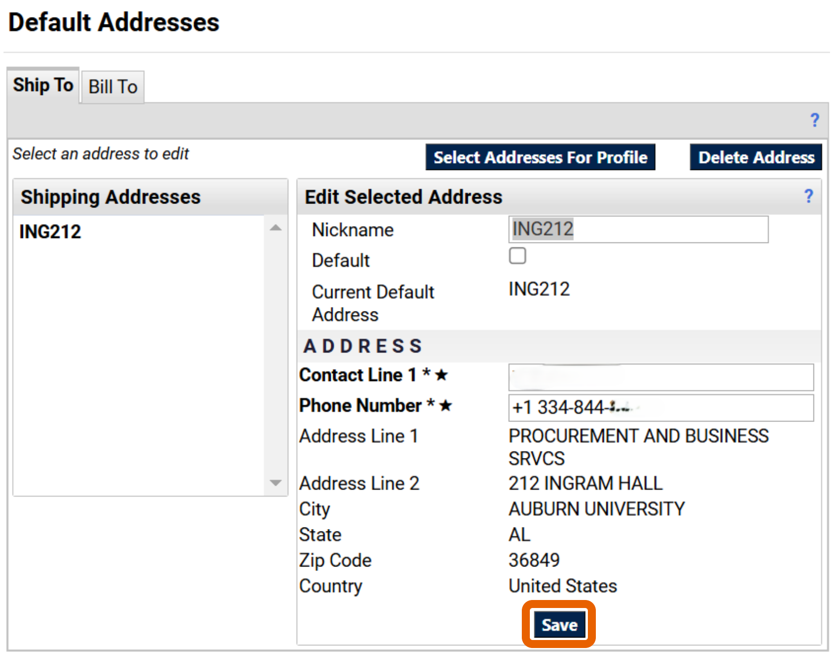


4. Search using a department, building name, street name, or street number. The directory of addresses includes only known Auburn address locations. Non-Auburn addresses are prohibited.

5. One you have identified the preferred address, select the corresponding option button.



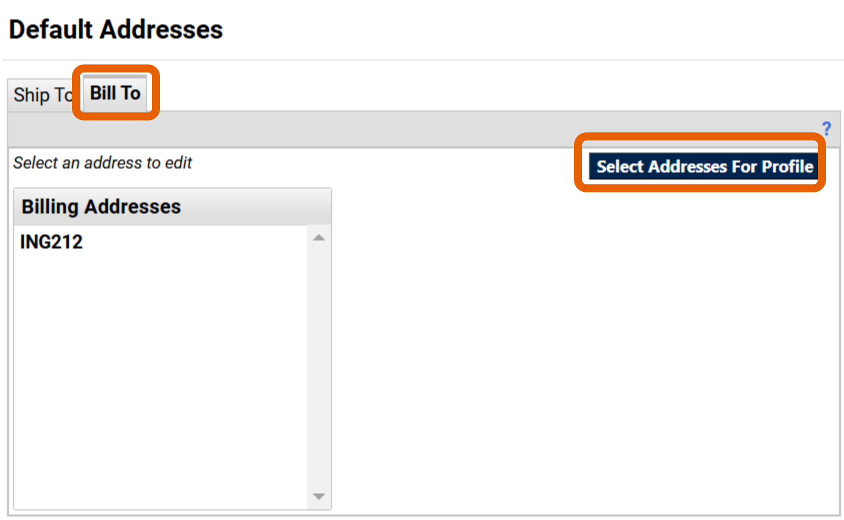
6. You will be prompted to complete user-specific date for the **Contact** and **Building**. *Be sure to add your contact phone number, as this is required for punchout purchases.* You also have the option of making this your default address. Select **Save** to store this address in your profile. This will ensure future orders are promoted with this shipping address.



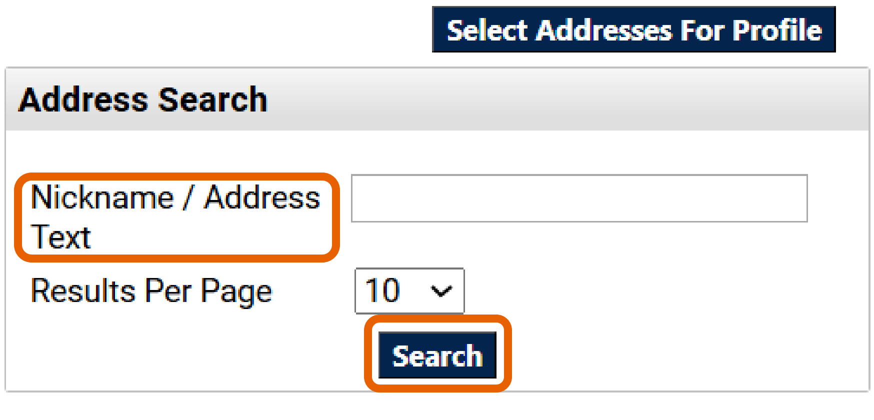
1.4 Entering Default Billing Address

Target Audience: **Requisitioner**

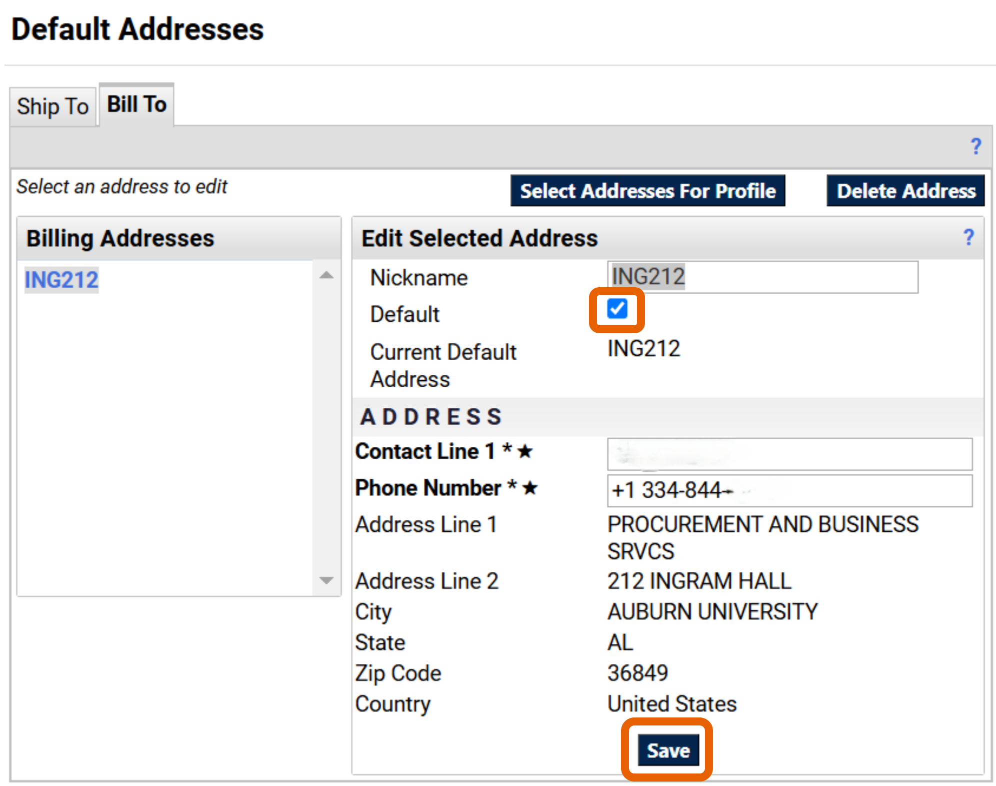
1. Follow **Steps 1 and 2** from **Section 1.3**, enter **Default Shipping Address**. The **Default Addresses** page will appear. Select the **Bill To** tab then select the **Select Addresses for Profile** button.



2. Following **Step 4 from Section 1.3**, search using a department, building name, street name, or street number. The directory of addresses includes only known Auburn address locations. Non-Auburn addresses are prohibited.



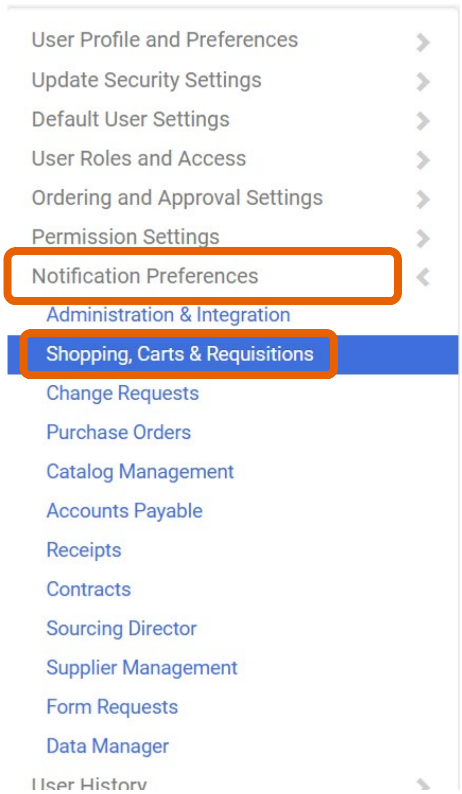
3. Select the **Default** checkbox and select **Save** to use the default Accounts Payable address for billing purposes.



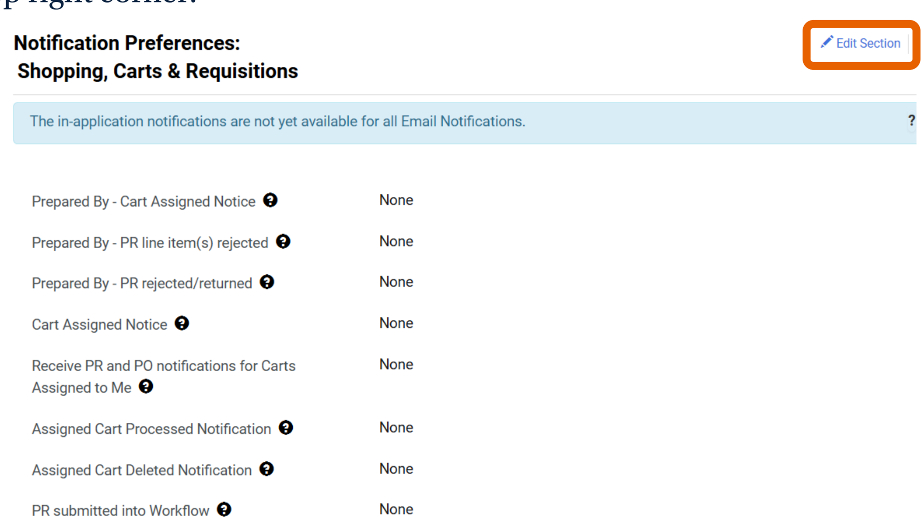
1.5 Updating Email Notifications

Target Audience: **All**

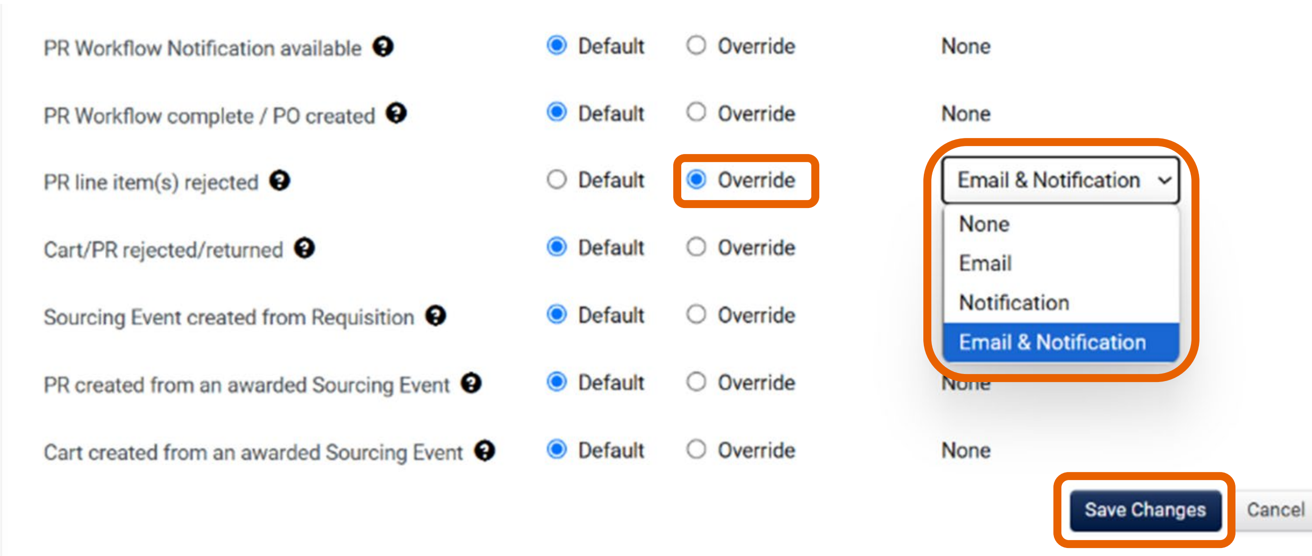
1. From the **View My Profile** menu option, navigate to the **Notification Preferences** option, then **Shopping, Carts, & Requisitions**.



2. A list of notifications will appear. After scanning the notification sub-category, use the ? icon to assess what each notification controls. Select the **Edit Section** link in the top right corner.



3. To change a notification, select on the **Override** option button and select the preferred options with include **Email**, **Notification**, **Email & Notification**, or **None**, and select **Save Changes**. When actions are performed in TigerBuy, emails can be generated to notify users of these actions. Users should check these email notification boxes to increase the level of individual notification. By Selecting the ? icon next to the notification preference, a brief description will be displayed to assist users in making a decision.

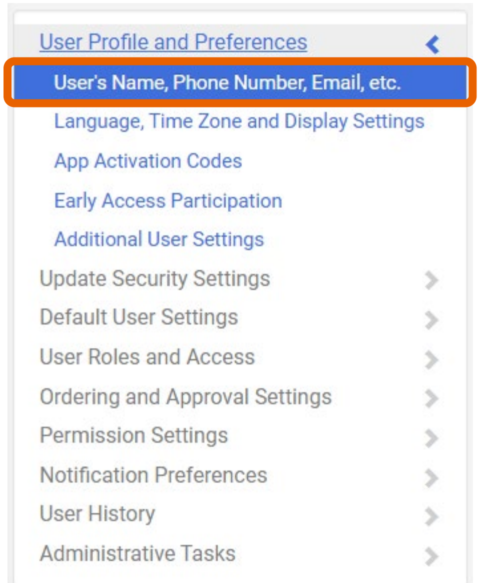


4. The **Email** option triggers outbound emails to your AU email address when the event occurs. **Notifications** trigger TigerBuy system notifications that are only viewable in the **Dashboard** menu under **Notifications**.

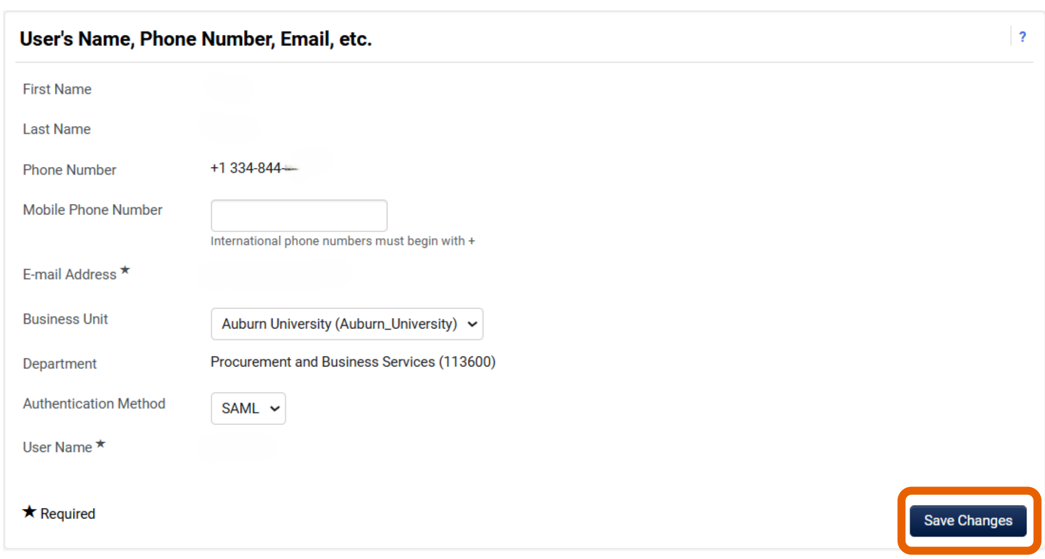
1.6 Customizing Personal Settings

Target Audience: **All**

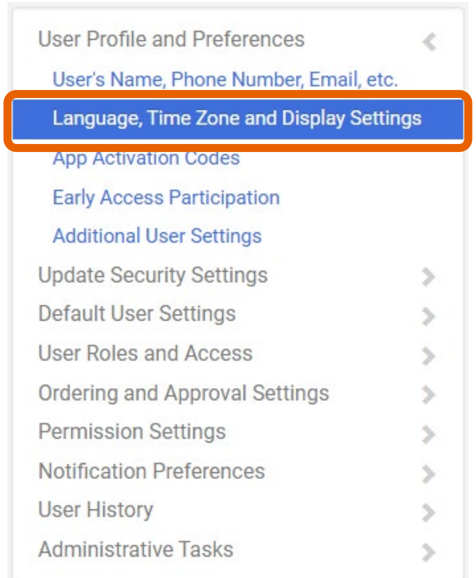
1. Users can customize some of their personal settings in TigerBuy by navigating to the **View My Profile** option, then **User's name, Phone Number, Email, etc.**



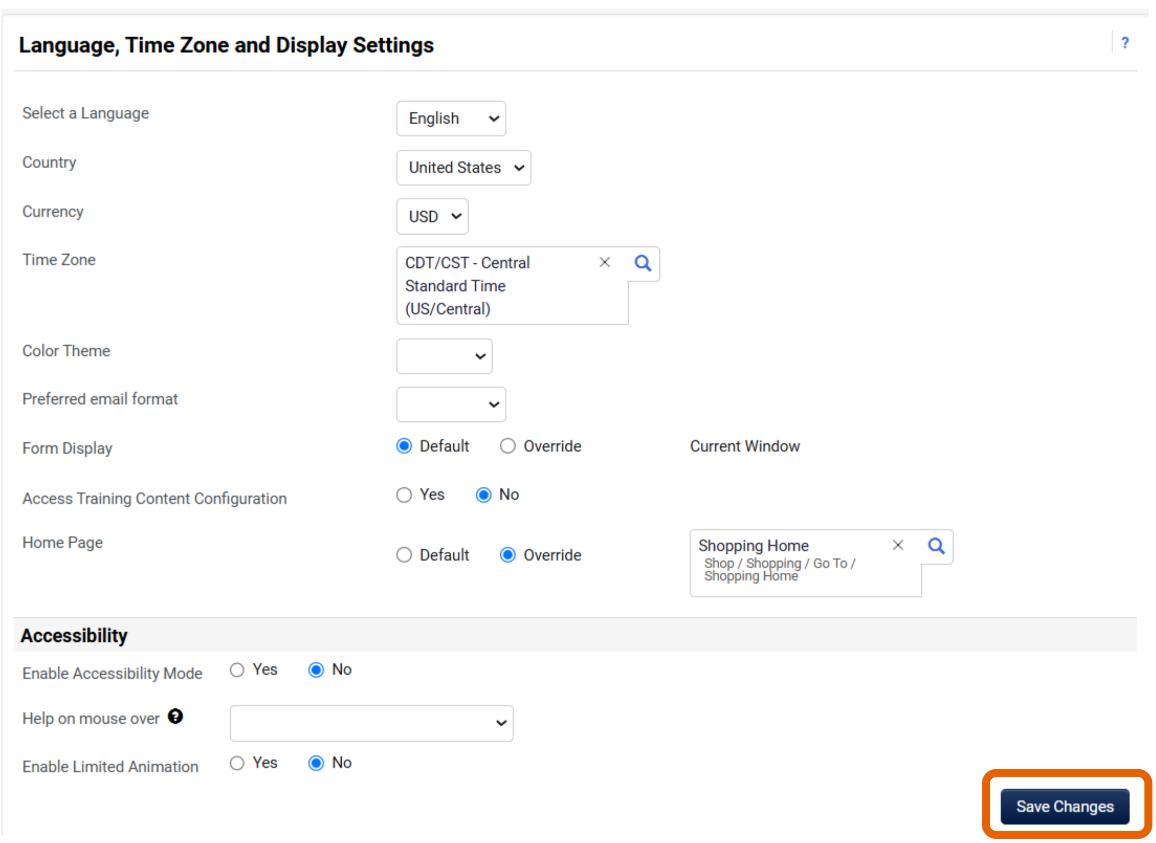
2. From this screen, users can edit personal settings depending on the level of access and fields made available by the system administrator. Be sure to save changes made by Selecting the **Save** button. *Reminder: Including a good phone number is extremely important to ensure orders are placed without issue.*



3. Users can also edit language, time zone, and display settings by navigating to the **Language, Time Zone, and Display Settings** link in the **Menu** tab.



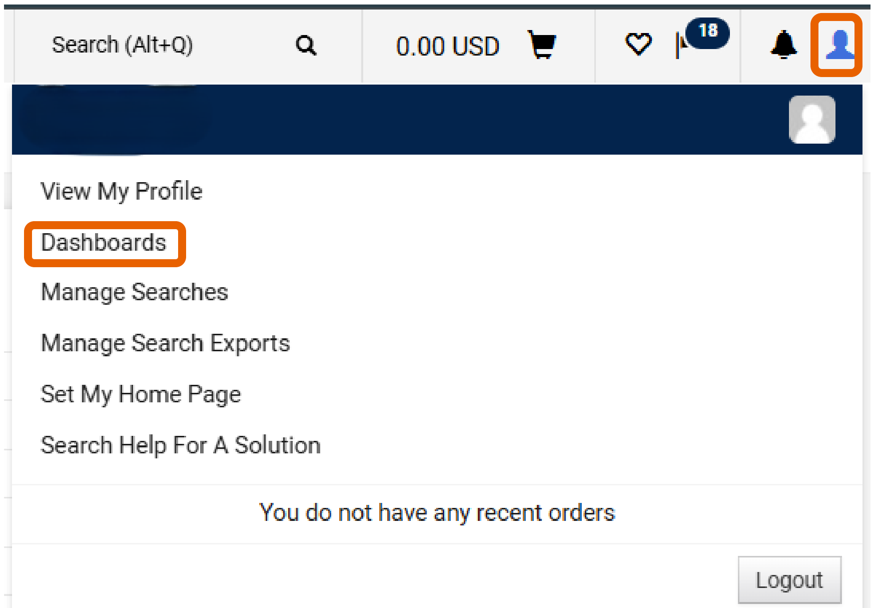
4. Users can edit various settings including language, geographical settings, help on mouse over settings, email preferences, etc. Be sure to save changes made by Selecting the **Save** button.



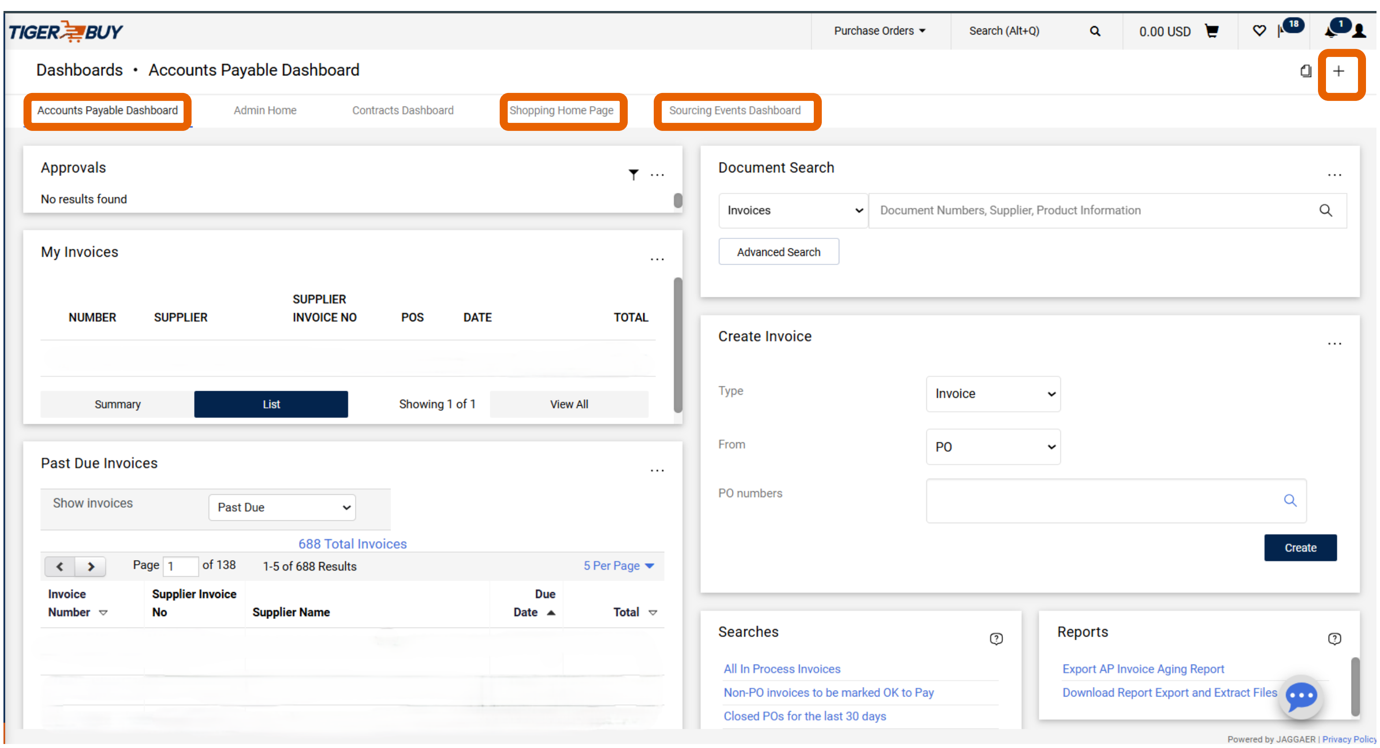
1.7 Customizing User Dashboards

Target Audience: **All**

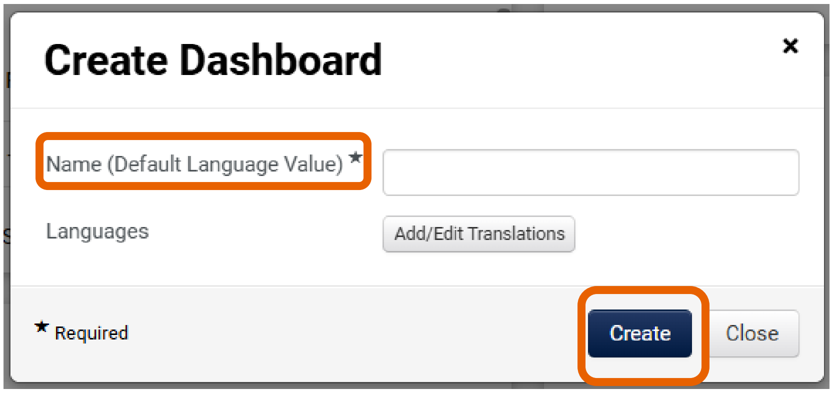
1. Users can view the prepopulated dashboards in TigerBuy by Selecting the  icon in the top right corner, then **Dashboards**.



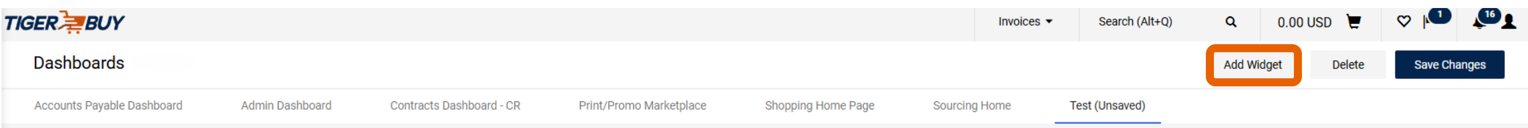
2. Depending on your access and what you prefer to view, you will be able to select from the automatic dashboards that are presented. Users also have the ability to create their own dashboard by Selecting the '+' in the top right corner.



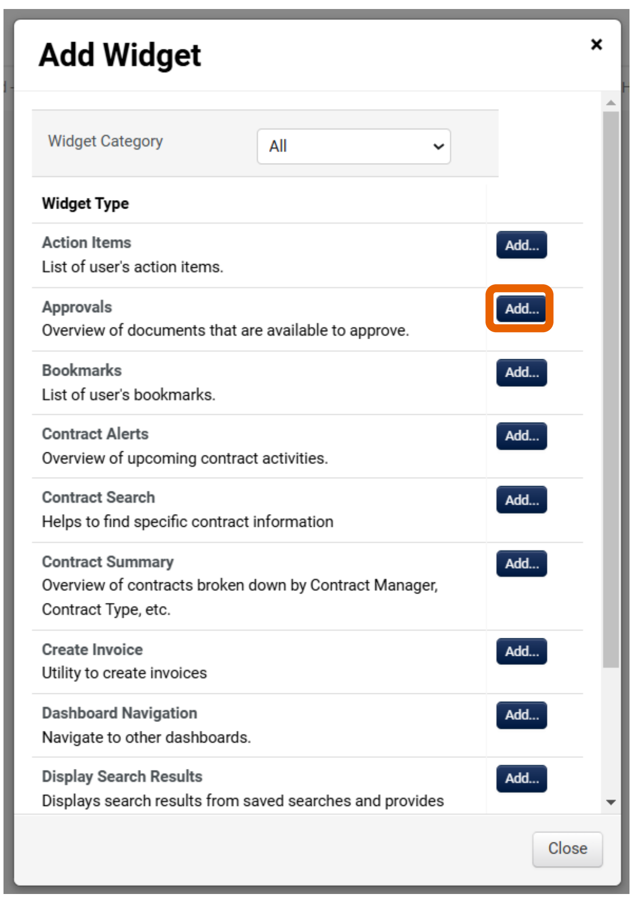
3. Start off by naming your personalized dashboard. Select **Create**.



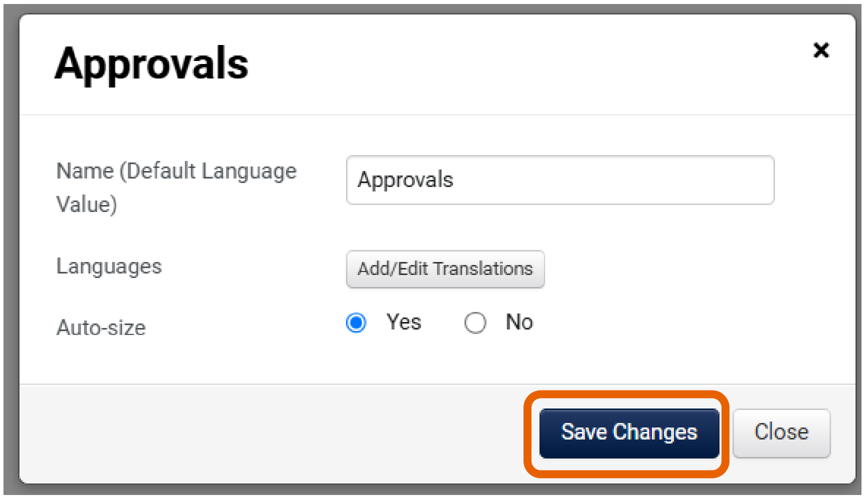
4. Next, select **Add Widget** to begin creating your personalized dashboard.



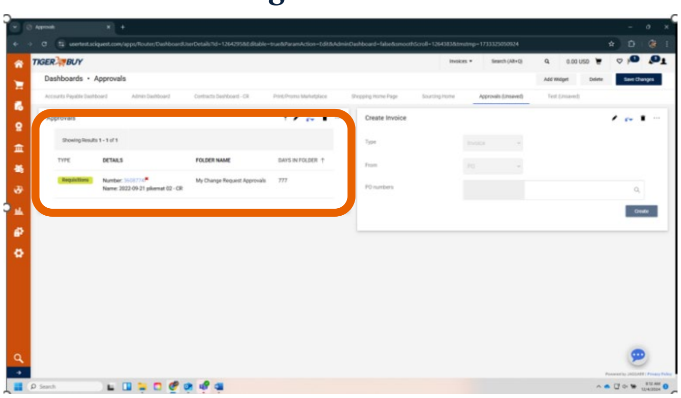
5. Select the widgets that you prefer and Select **Add**.

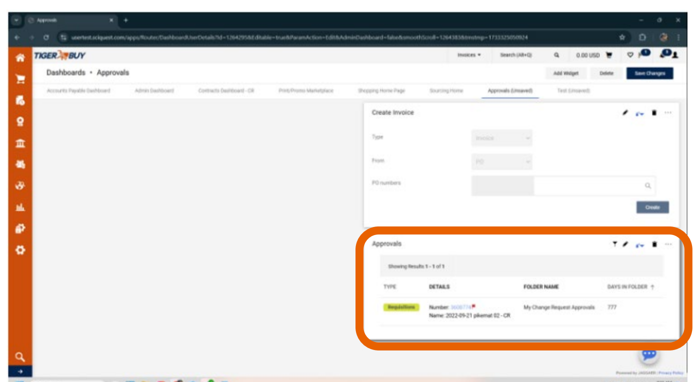


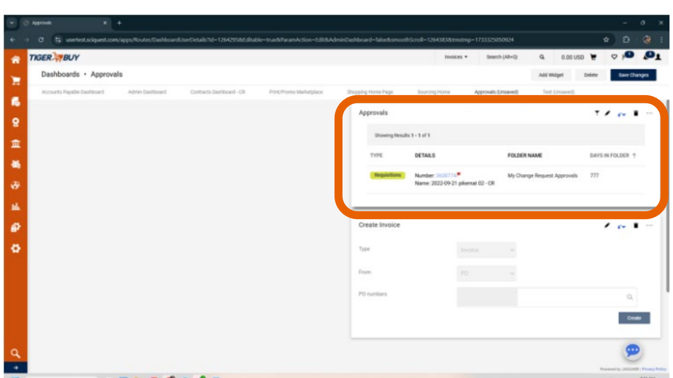
6. Next, verify the widget you are adding. You can change the name or continue with the default. Select **Save Changes**.

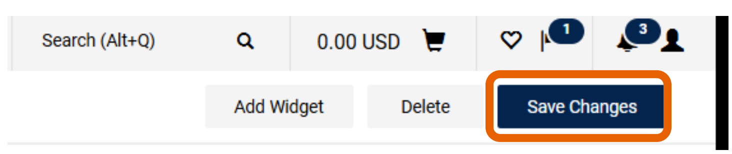


7. Once you have added the widget you want, you have the ability to place them in the order/arrangement that you prefer. Select by the title of the widget and drag to the spot that is desired. Users are also able to edit using the buttons on the top right of each widget. With these buttons, users are able to do a variety of things such as edit, change the color, and delete the widget. When edits are complete, Select **Save Changes**.

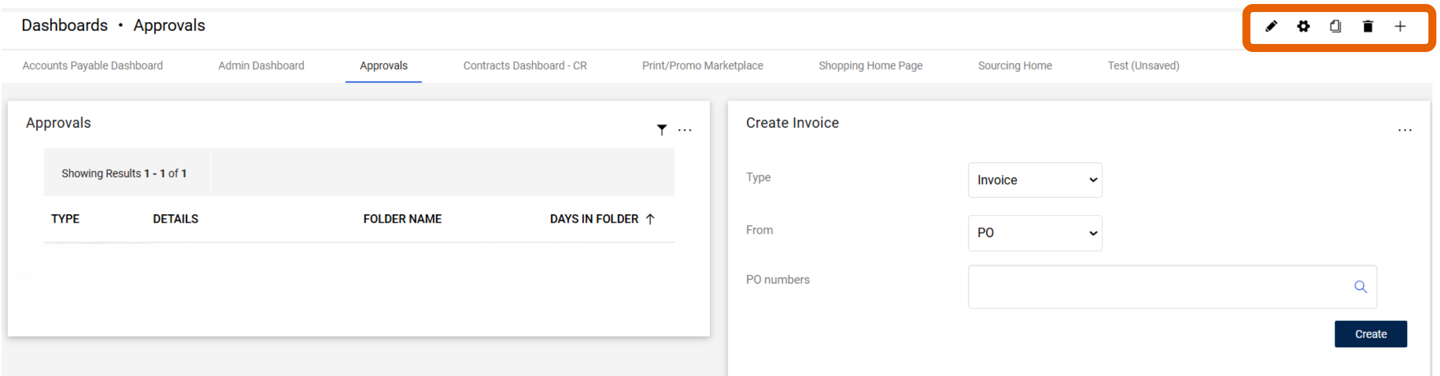








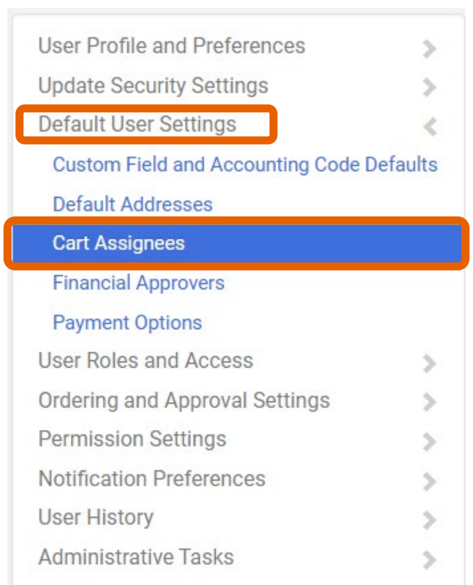
8. Now users will see their completed dashboard. The edit buttons have moved to the top if any future changes need to be made.



1.8 Entering a Default Cart Assignee

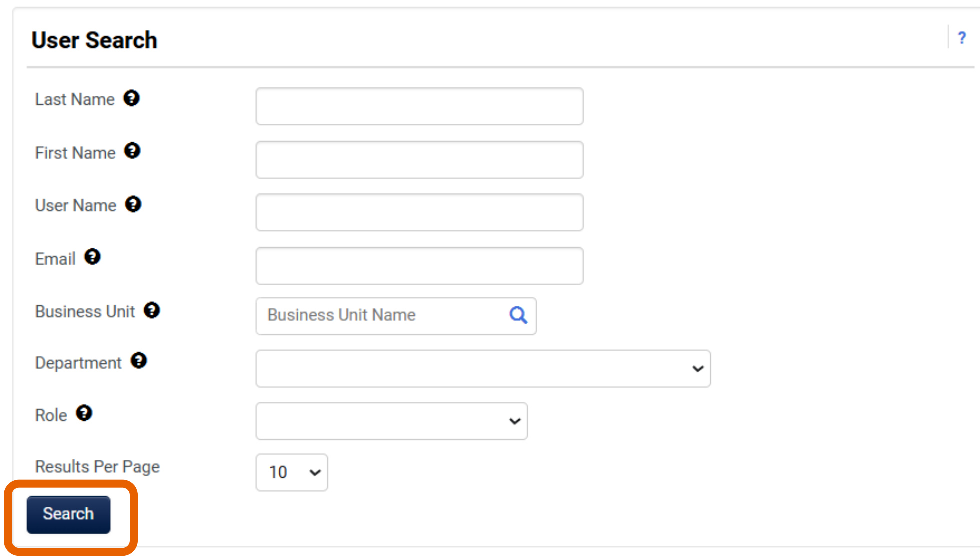
Target Audience: **Requisitioner**

1. From the **View My Profile** menu option, navigate to the **Default User Settings**, then **Cart Assignees**. A cart assignee is the person that will receive the carts by default.

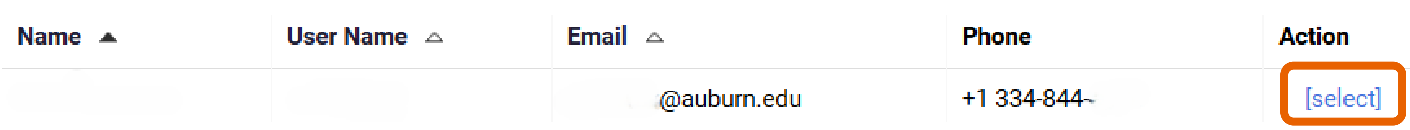


2. From the **Cart Assignees** page, select the **Add Assignee** button in the upper left corner.

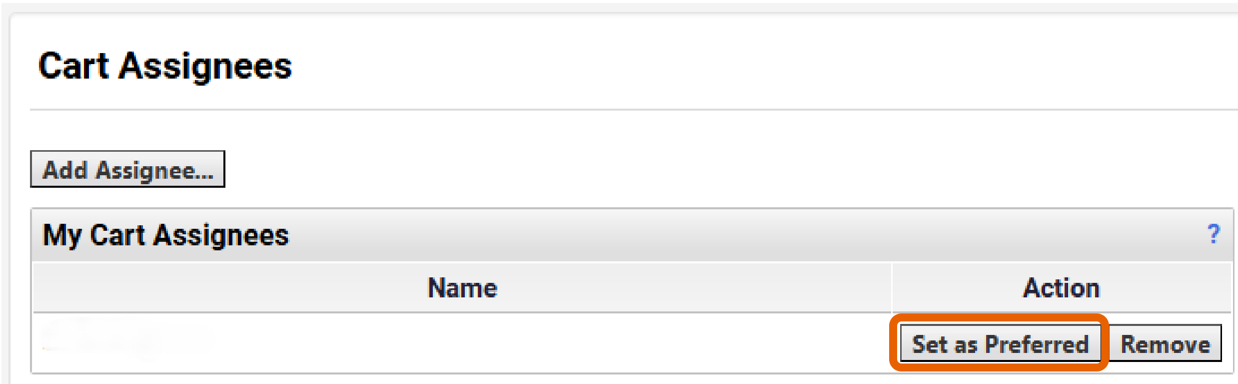
3. A search dialogue box will appear. Search for your assignee using **Last Name, First Name, Username and/or Email**.



4. Locate the designated assignee and select **Select**.



5. Once you have selected your assignee, you can also Select the **Set as Preferred** button to ensure the assignee name is easily accessible when you attempt to assign a draft cart.

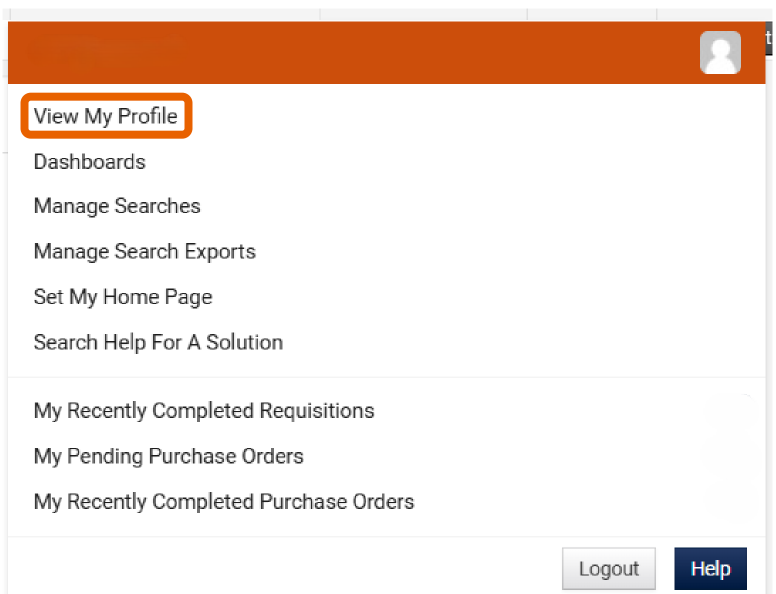


1.9 User Access and Roles

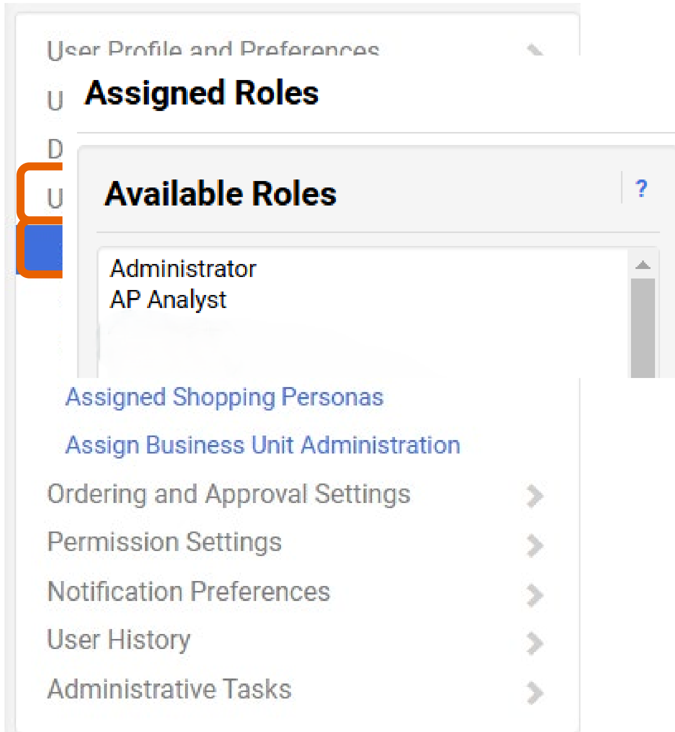
Target Audience: **All**

Sign in to TigerBuy using your normal AU system-administered credentials.

1. From the TigerBuy home page, Select the icon in the dashboard located in the top right corner and select **View My Profile** from the menu.

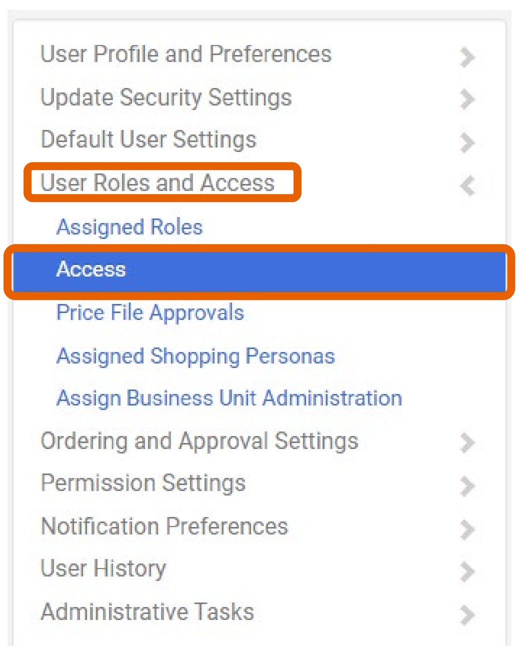


2. Navigate to **User Roles and Access** and select **Assigned Roles**.

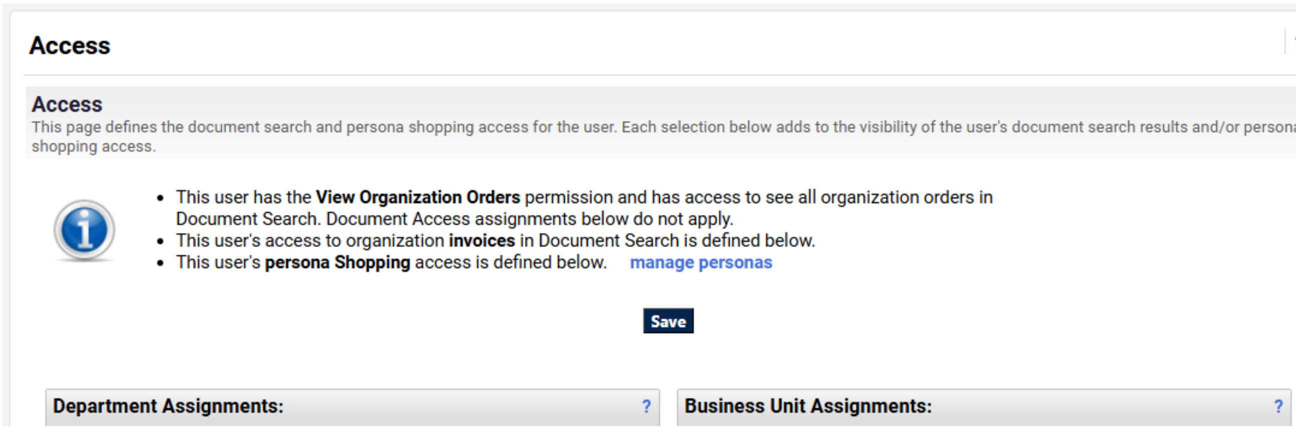


3. The role assigned to your user will appear. Your role determines the level of access in TigerBuy.

4. Select **Access** from the **User Roles and Access** menu.



5. This page shows the level of access that will be available to the user on the history-searching pages for purchase orders, requisitions, invoices, and receipts.



1.10 Setting up the TigerBuy Mobile App

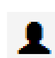
Target Audience: All

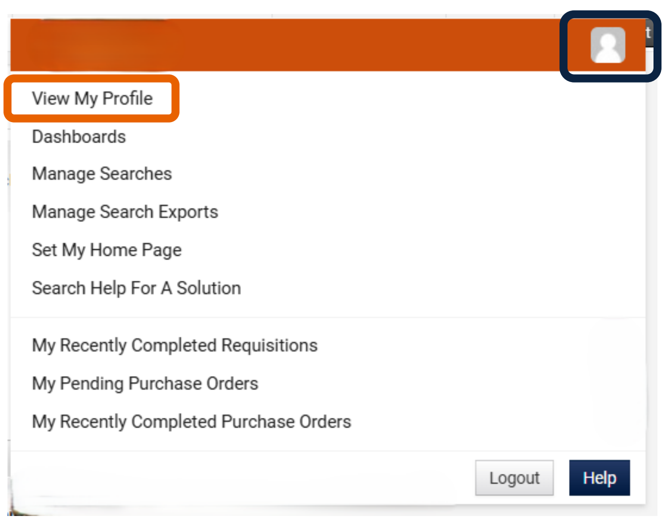
The TigerBuy Mobile app allows users to perform various tasks from their mobile device. Depending on a user's role and permissions, availability of tasks will vary.

- Manage documents assigned to you for approval.
- Access your action items and notifications.

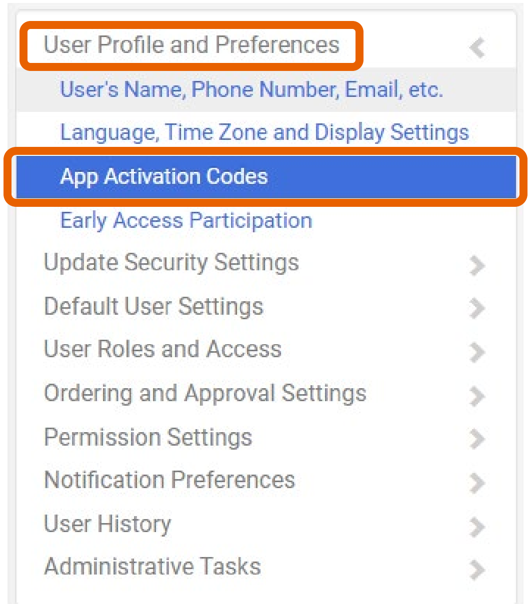
Supported Devices
The TigerBuy mobile app is currently available for both iOS (version 10.0 and higher) and Android (version 4.0.3 and higher) in their stores. The app will function on an iPad but it is scaled for a smaller iPhone screen.

1.11 Installing the App

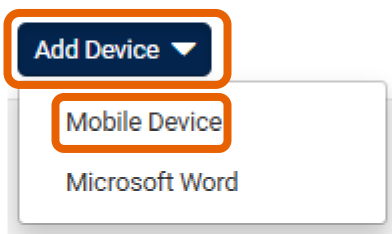
1. Log in to TigerBuy. Select on the  icon on the right, then **View My Profile**.



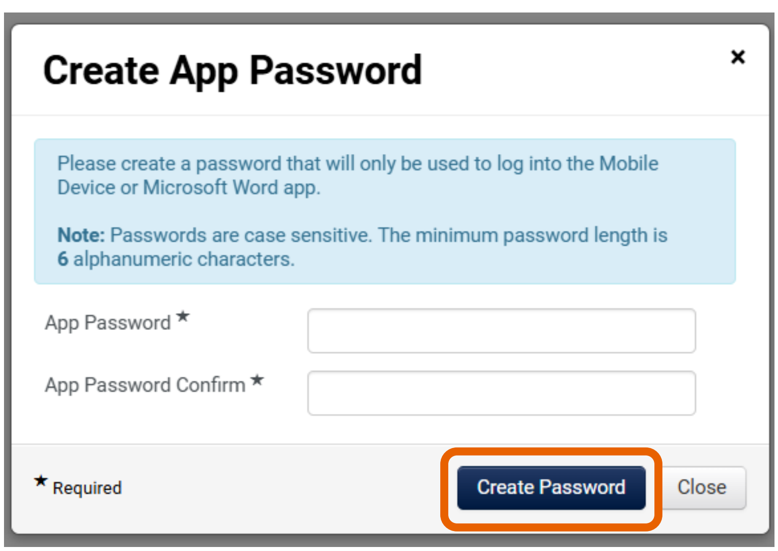
2. Select on **App Activation Codes**.



3. Select **Add Device**, then **Mobile Device**.



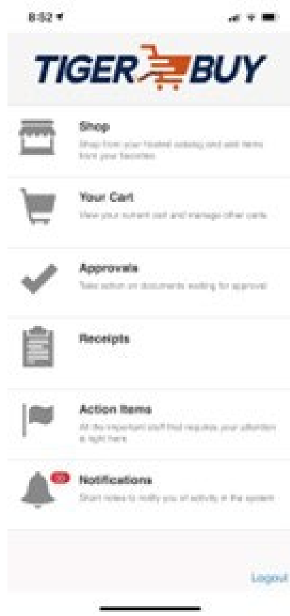
4. You will then be prompted to create a password. Please note that this password is for the mobile app only and not for access to TigerBuy through the web, which will continue to use your single sign-on for authentication.



5. Next, name your device. Choose **Yes** to email the activation code to your device. However, you can always retrieve it in your account settings. Select **Add Device** and your authentication code will be displayed.

6. Download and install the mobile app on your device. In your app store, you will need to search for "**Jaggaer**". The correct app name is **Jaggaer**, not Jaggaer Advantage.

7. Once downloaded, open the app. You will be prompted to enter the authentication code from your email or profile screen the new app password that you created. When you get logged in, you will see the TigerBuy homepage.



Auburn University TigerBuy

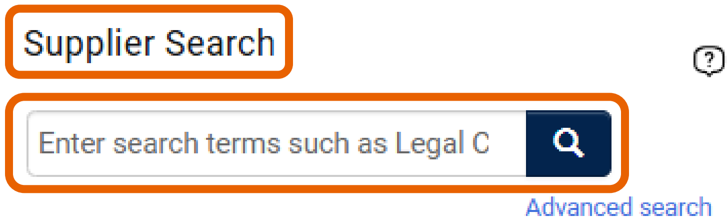
Module 2: Cart Creation

AUBURN UNIVERSITY
Procurement and Business Services

2.1 Searching by Supplier

Target Audience: **Requisitioner**

1. In addition to searching for products, users can also browse TigerBuy by suppliers by accessing the **Supplier Search** bar on the home page **OR** by using the **Quick Search** box in the **Suppliers** section in the left-hand navigation menu.

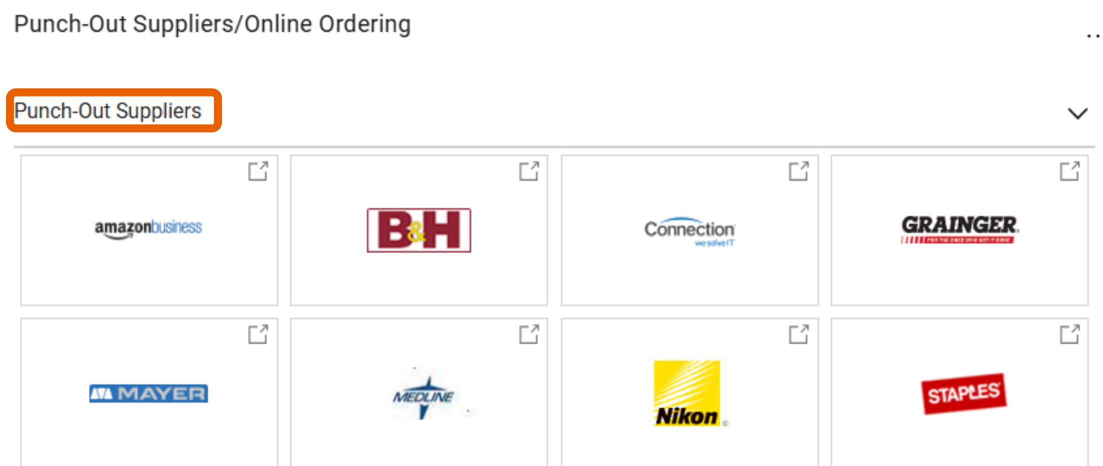


2.2 Creating Shopping Carts from Punchout Catalog

Target Audience: **Requisitioner**

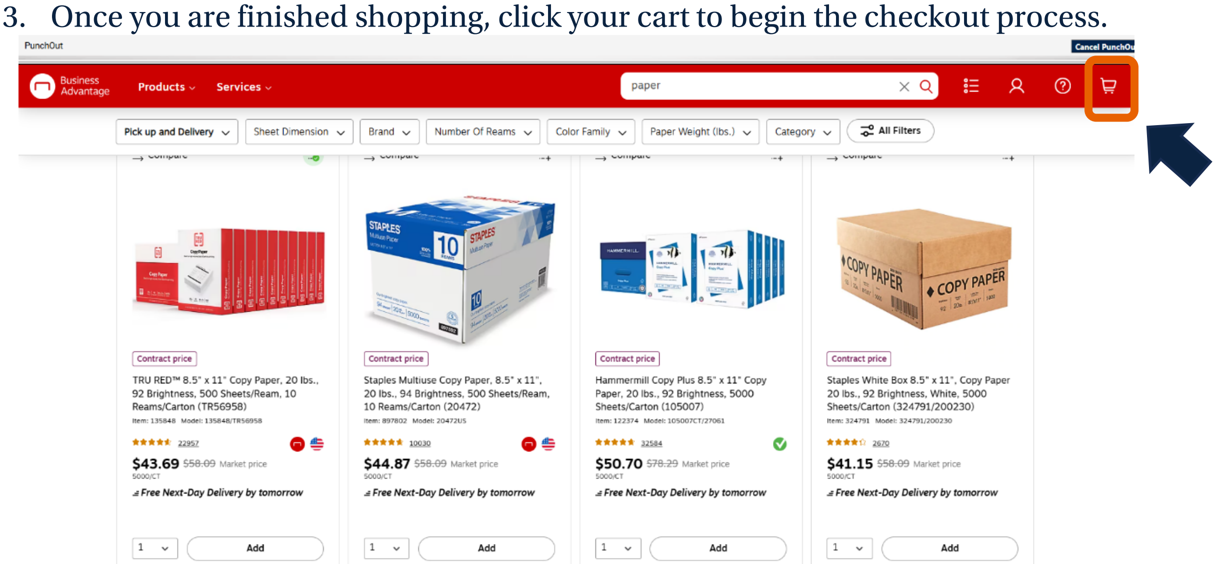
Users can create shopping carts from the supplier **punchout catalogs**. A punchout catalog is a catalog that resides in the supplier's website. When users shop using a punchout catalog, they are directed to the supplier's catalog to fill a cart and then return it to TigerBuy for processing.

1. Users can all add products to a cart from the **Shopping Homepage** (🏠 icon), search for a product or choose of the catalog suppliers. For this module, we will search via supplier. Choose a supplier and click to be directed to the supplier's online punchout catalog.

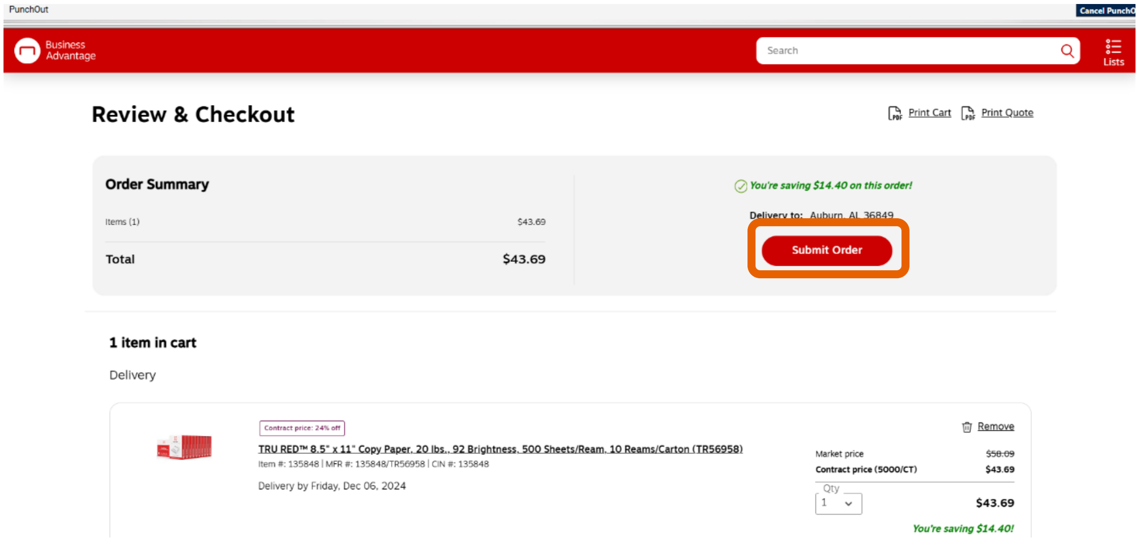


2. Users will be redirected to the supplier's TigerBuy portal to shop as normal. Products can be added to the shopping cart from the punchout site.

3. Once you are finished shopping, click your cart to begin the checkout process.



4. Review your cart and select **Submit Order**. You will then be redirected back to TigerBuy to complete your checkout.



2.3 Creating Shopping Carts for Non-Catalog Items & for Sourcing Events

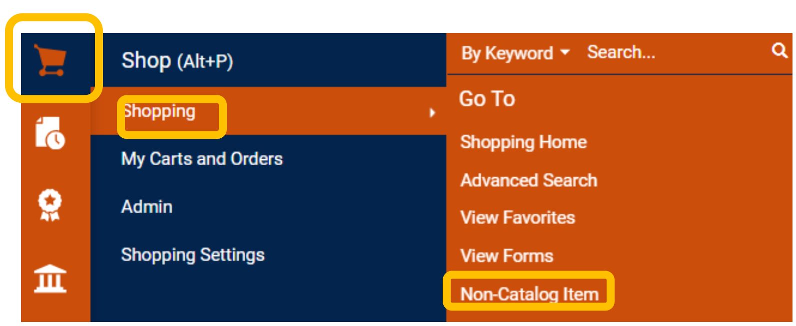
Target Audience: **Requisitioner**

Non-Catalog Requests are intended to address purchasing needs that fall outside of typical requests for goods and/or contract-enabled supplier items.

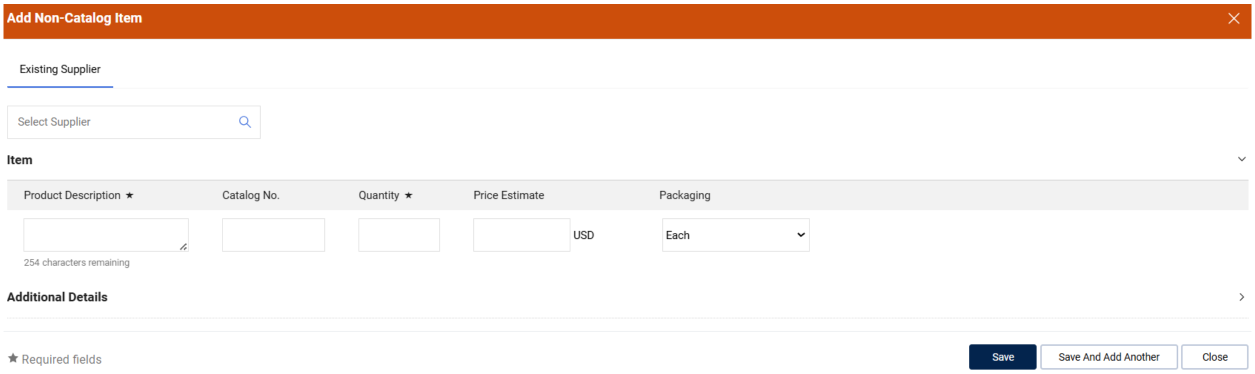
Building a Non-Catalog request will not require navigation outside of the TigerBuy environment. Prior to beginning a Non-Catalog Request, ensure that your cart is empty. Non-Catalog Requests follow a different approval queue and cannon be mixed with other types (e.g. Punchout items, Catalog items, Form Items).

Once you have completed a Non-Catalog Request, you will add the items to your cart, navigate to the draft cart, and follow a standard checkout process.

1. From the Shopping homepage, click the **Non-Catalog Item** link located in the **Go To** menu. It appears directly above the search bar.

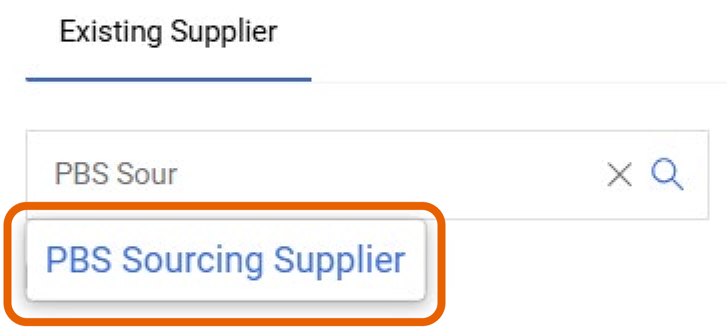


2. The **Non-Catalog** link opens in a separate order form, which includes required fields, not Non-Catalog item information.



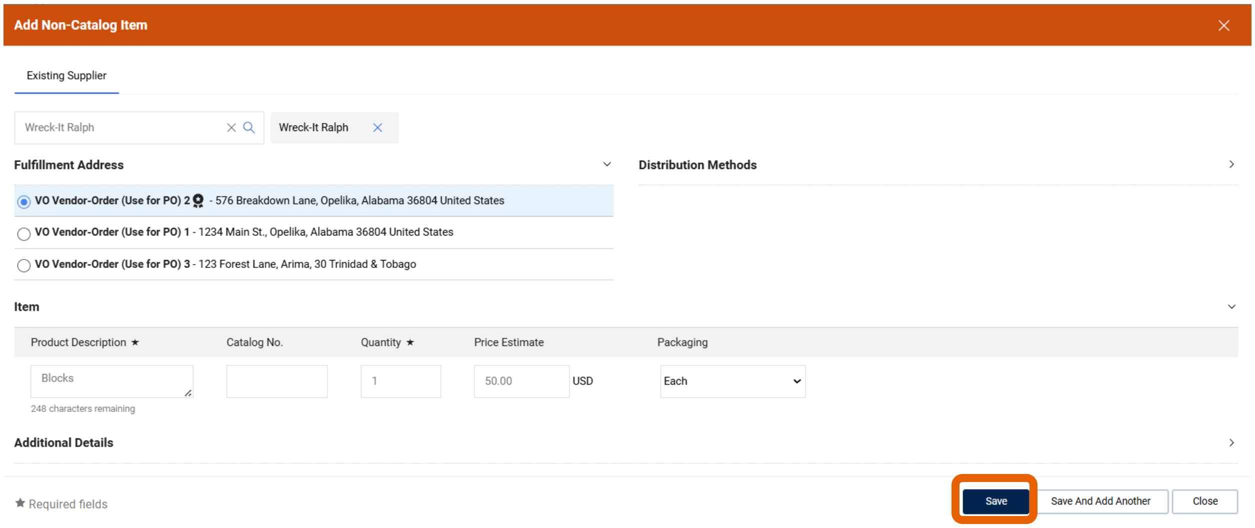
3. **Enter Supplier** is a search-enabled field which queries the entire supplier directory. If you cannot locate your supplier, a new supplier request may be necessary.

   NOTE: For purchases of $75,000 or greater that require a formal, sealed bid, a sourcing event will be required. If a department is entering a requisition, **PBS Sourcing Supplier** MUST be entered as the supplier along with the dollar amount requested. This will ensure that it does not get to the buyer assigned to the chosen purchasing category.

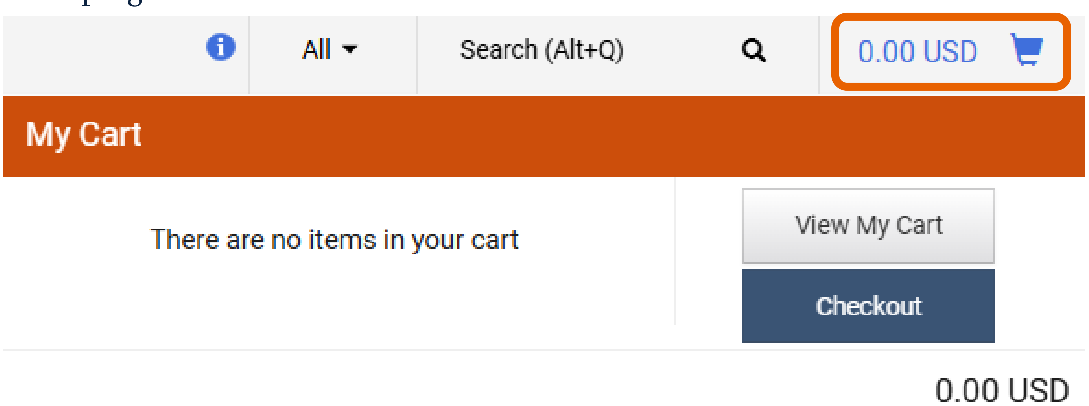


4. Complete each of the required fields (indicated with an *) with the appropriate information. Included are: Description, Quantity, and Price.
5. Additional line items can be added by using the **Save and Add** Another button located at the bottom of the Non-Catalog Request form.

6. Once all necessary information has been entered, click **Save**. This will deposit your non-catalog line items into your cart. Navigate to the cart, name it if you wish, and **Save**.



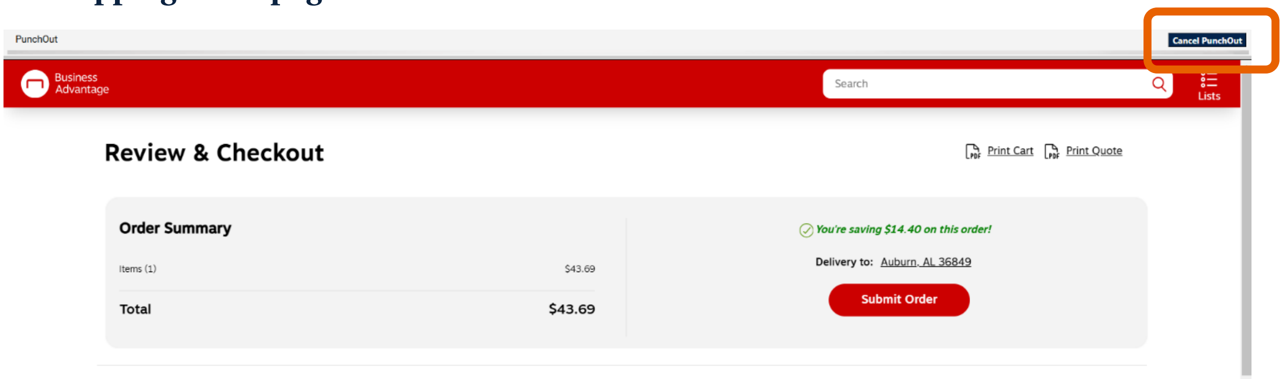
7. Proceed to your cart to begin the checkout process by clicking the icon located in the top right menu.



2.4 Canceling Punchout Sessions

Target Audience: **Requisitioner**

To cancel a punchout session, select the **Cancel Punchout** button at the top right-hand corner of the supplier punchout screen. You will be redirected to the TigerBuy **Shopping Homepage**.

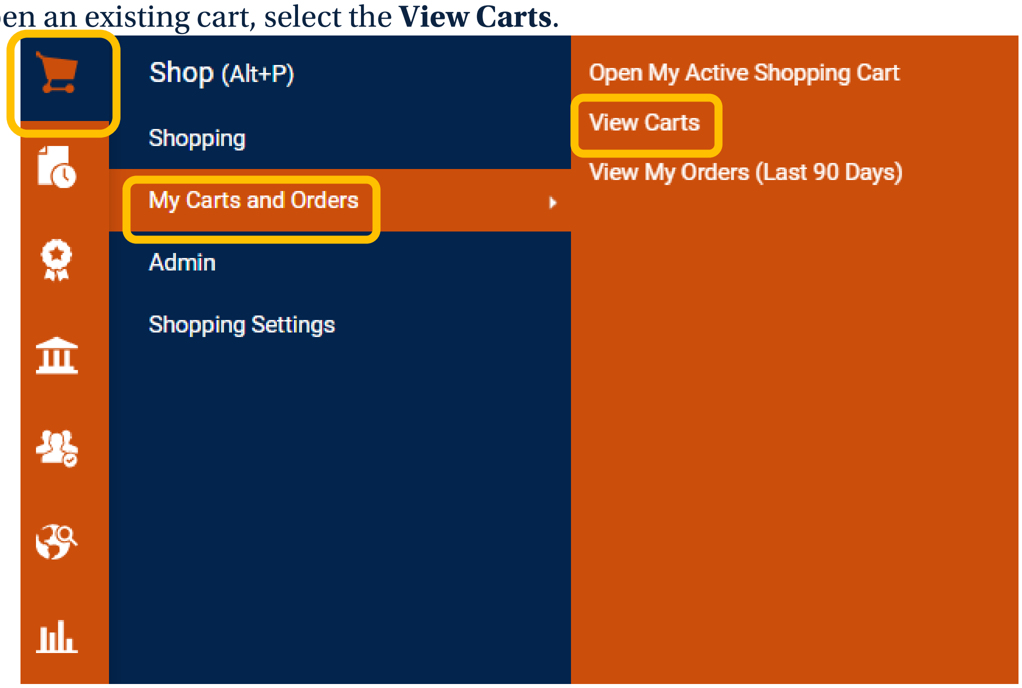


2.5 Assigning Shopping Cart to Requisitioner

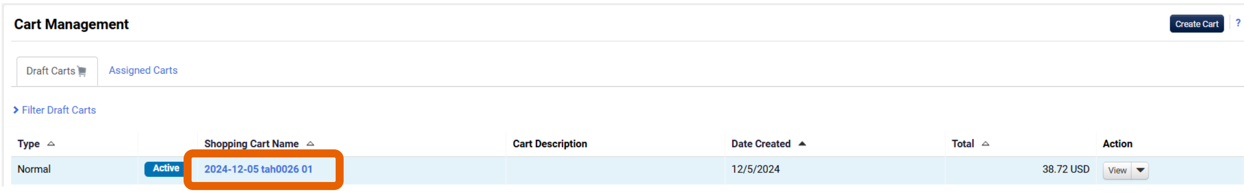
Target Audience: **Requisitioner**

You can assign a Shopping Cart to another user. This option is relevant to anyone, as they can assign their draft cart to a department requisitioner to fill in the accounting information. Assigning a cart is also useful to aggregate multiple items for different users, while still consolidating the request to one order.

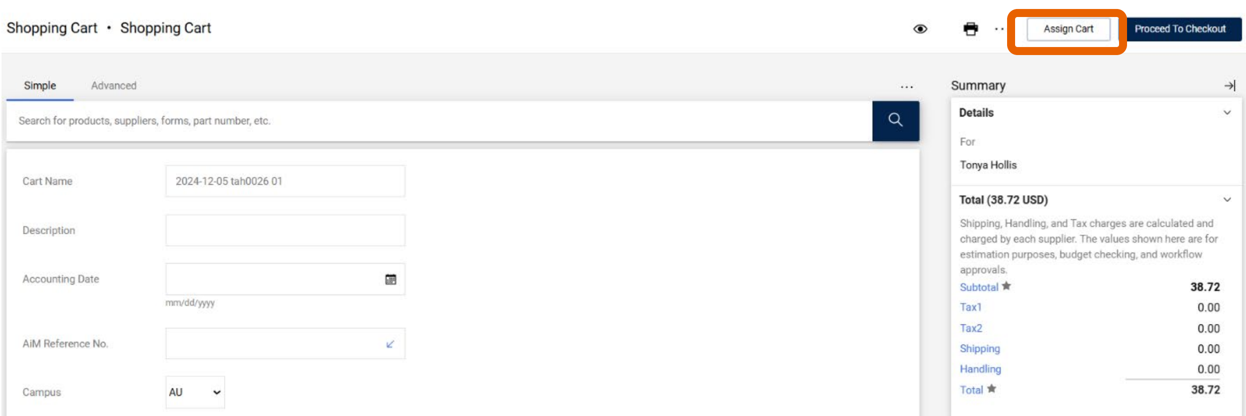
1. Click the Shopping Cart ( ) icon and choose the **My Carts and Orders** option. To open an existing cart, select the **View Carts**.



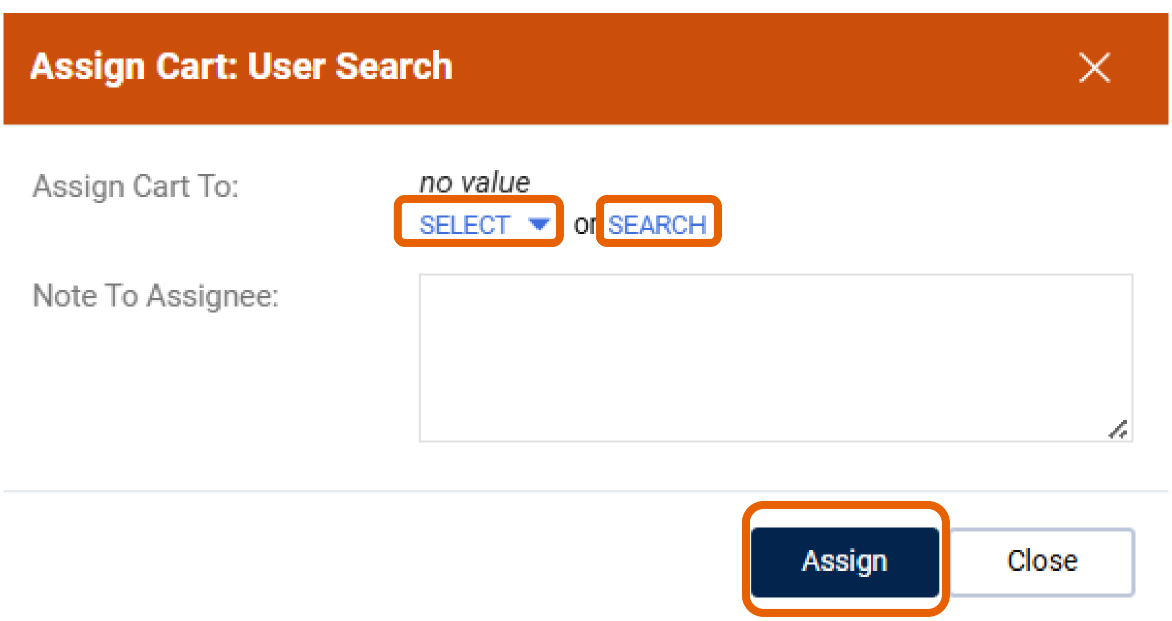
2. All draft carts will appear. Select the desired cart for editing by clicking the **Shopping Cart** you want to assign.



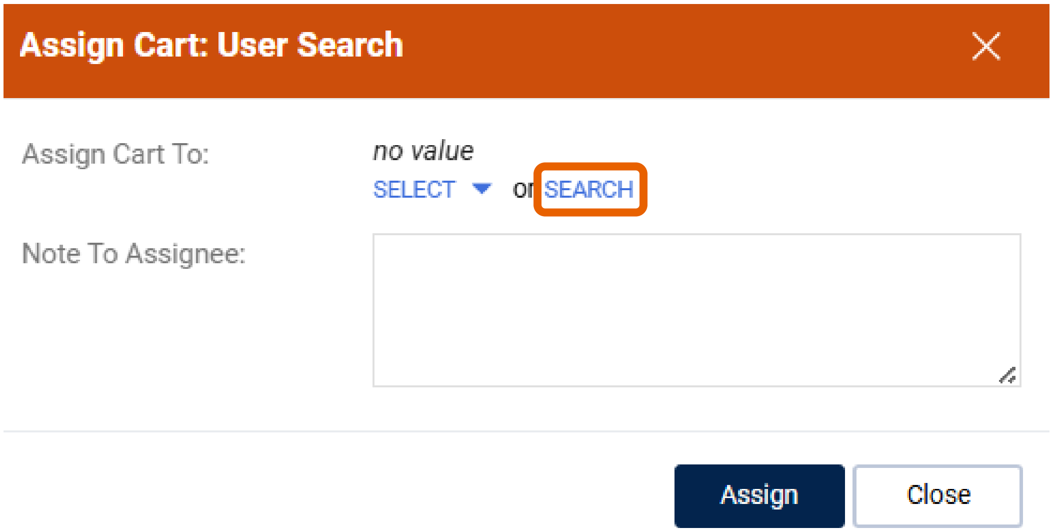
3. Once the active shopping cart is open, click the **Assign Cart** button in the top right-hand corner.



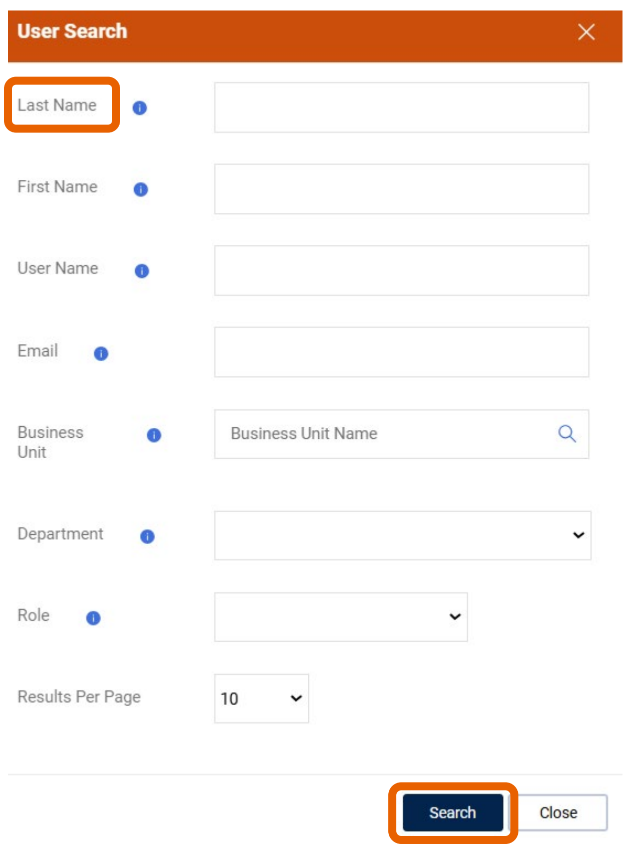
4. Clicking the **Assign Cart** button allows the user to search the TigerBuy directory for their requisitioner, add them to their profile to expedite future efforts, and add a note to the assignee, which will be delivered to their email via a system notification. You can assign carts by **Selecting** or by **Searching**. To select a person based on profile values, choose the **Select** value option button.



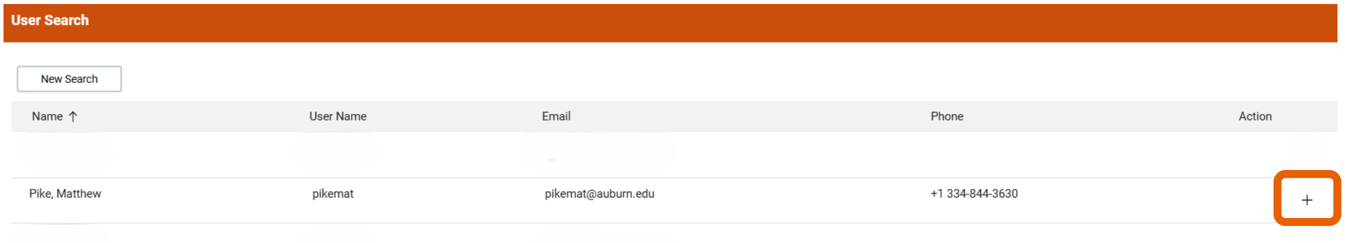
5. To search for an assignee, choose the **Search** option button.



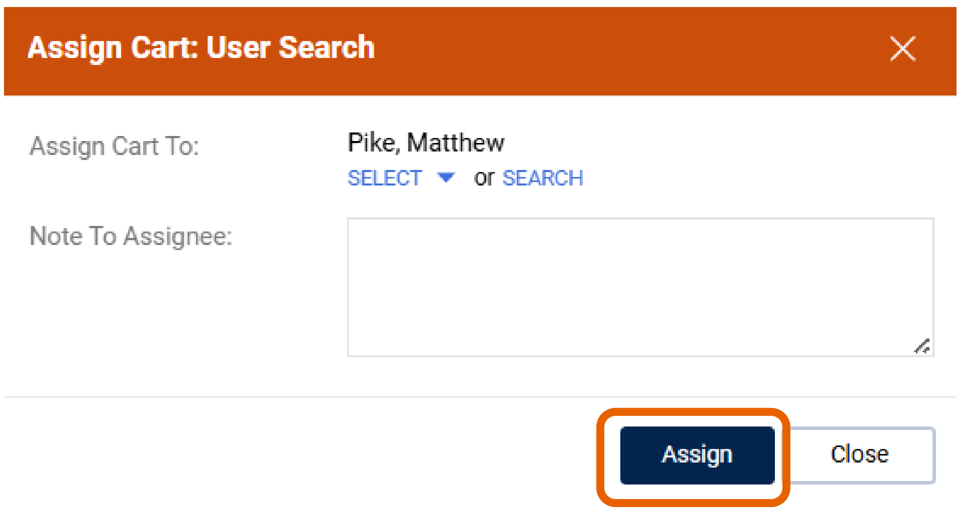
6. At the User Search screen, type in the information of the requisitioner that is being assigned the cart and click **Search**.



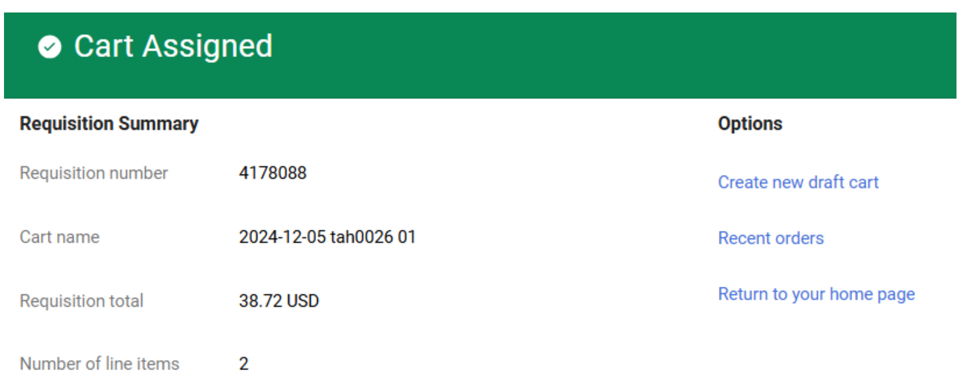
7. Choose the appropriate person and click **+** to add.



8. After selecting the assignee, click the **Assign** button.



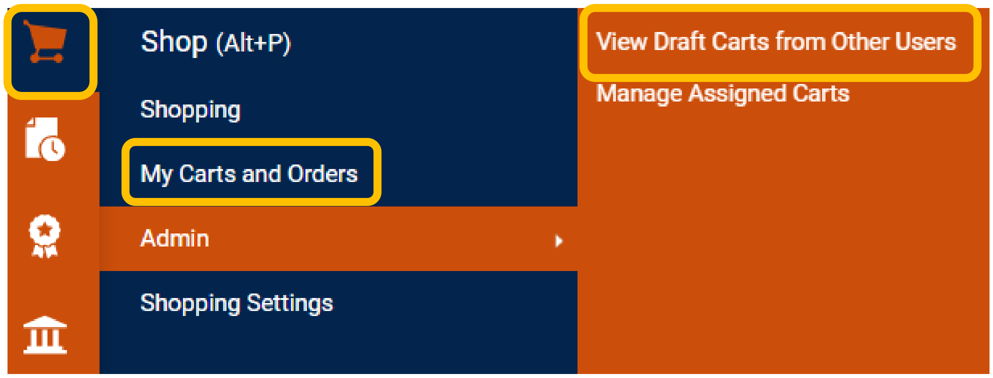
9. Once the assignee has been chosen, you will receive a confirmation email that the cart has been assigned.



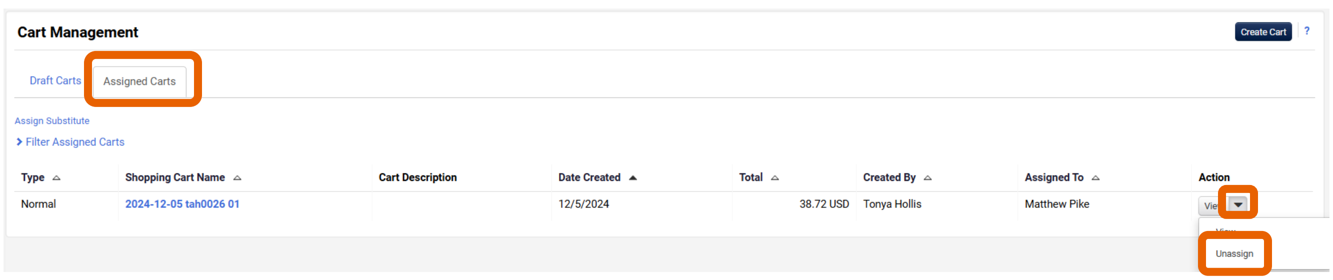
2.6 Unassigning Shopping Cart to Requisitioner

Target Audience: **Requisitioner**

1. After logging in, click the icon in the left menu panel, navigate to **My Carts and Orders**, and select **Open My Active Shopping Cart**.



2. Choose the **Assigned Carts** tab to view the carts you have assigned. Find the cart you want to unassign and click the **View** dropdown menu and **Unassign**.

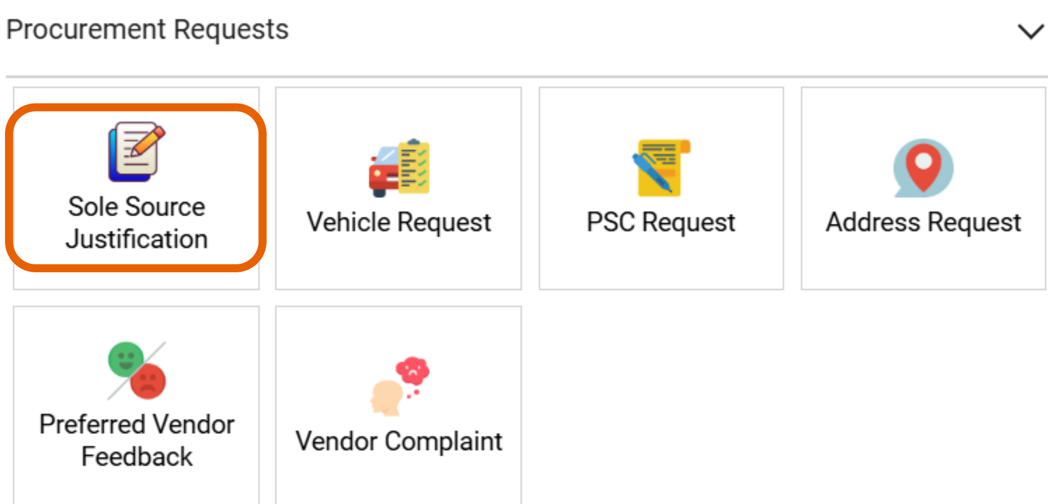


2.7 Creating a Cart from a Sole Source Justification

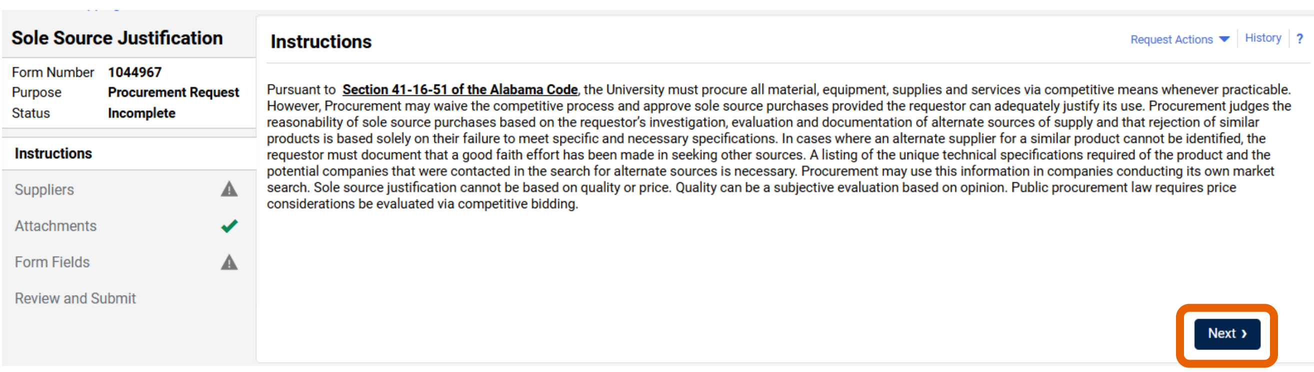
Target Audience: **Requisitioner**

Sole Source should be used when only one supplier is capable of delivering the required product or service.

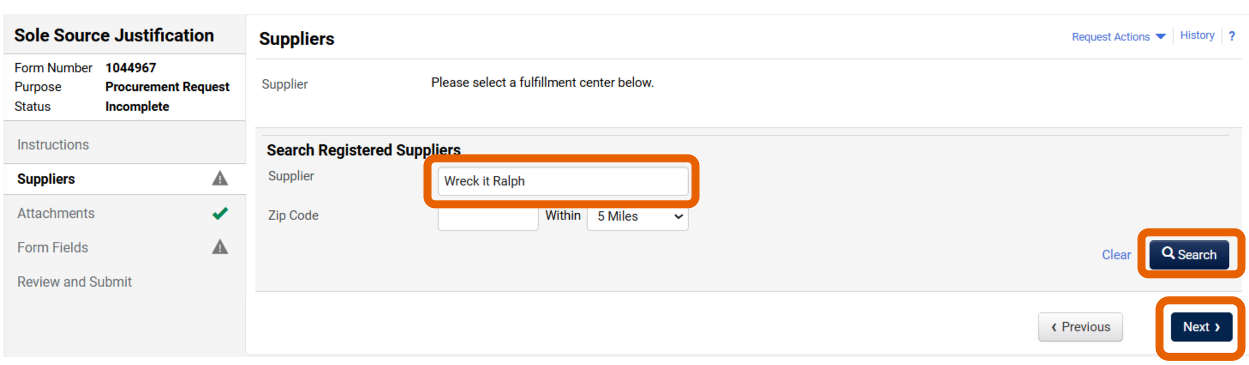
1. From the **Shopping Homepage**, select the **Sole Source Justification** button in the **Procurement Services Forms** section.



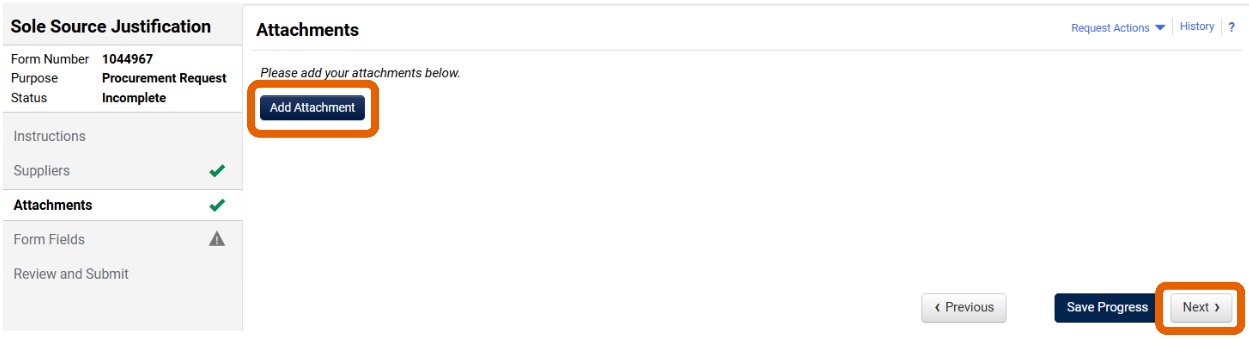
2. The **Sole Source Justification** form will appear. Read the instructions carefully and select **Next**.



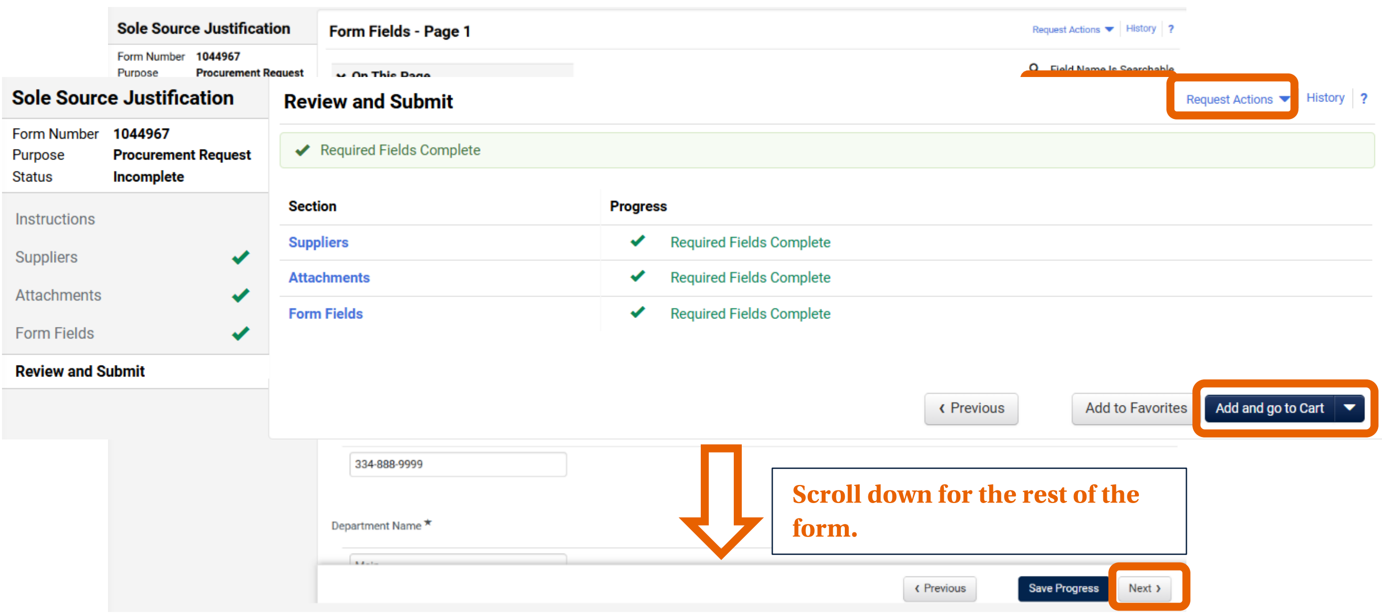
3. Fill in the supplier details. Search and select the correct supplier and click **Next**.



4. Add any attachments that need to be included in the Sole Source Justification. Attachments may include the quote, distributor information, relevant patent documentation, previous research, letters from the manufacturers, etc. When complete, click **Next**.



5. Next, fill in required information. All required information is marked with an asterisk (*). Click **Next**.



6. Confirm all sections are complete and click **Add and Go to Cart**. Follow the regular cart checkout procedures.

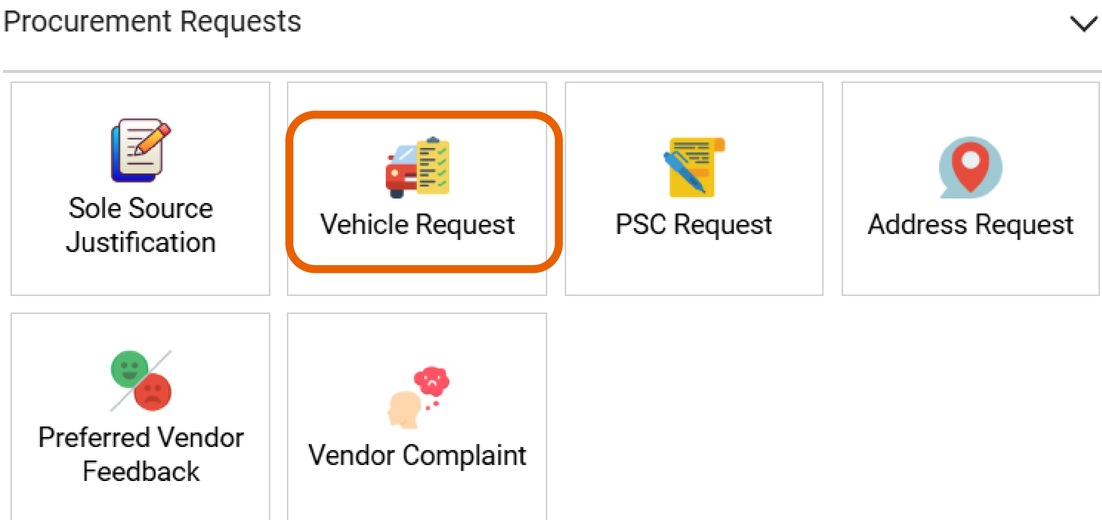
2.8 <u>Creating a Cart from a Vehicle Request Form</u>

Target Audience: **Requisitioner**

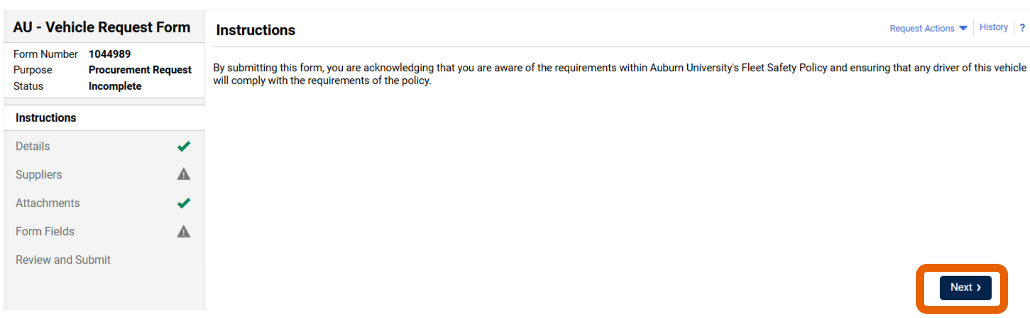
A Vehicle Request Form will be used when a department needs to purchase or lease a new vehicle. Vehicles to be requested are cars, trucks, SUVs, UTVs, golf carts, or other forms of motor vehicle transportation.

Short term rentals should not utilize this form.

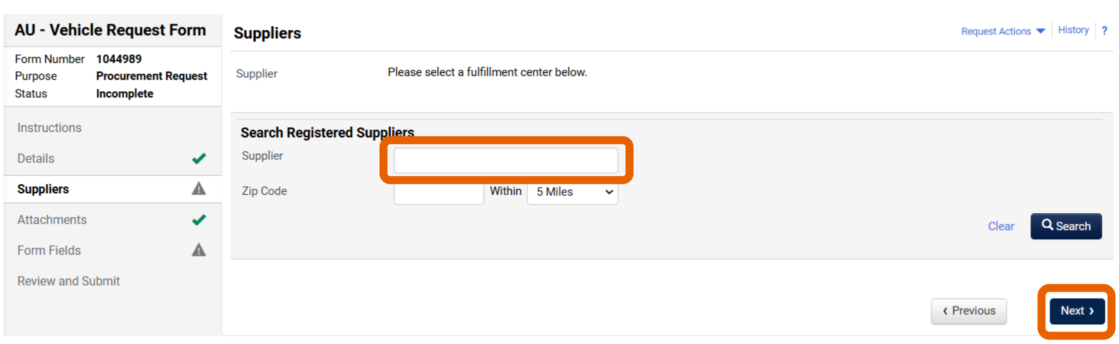
1. From the **Shopping Homepage**, select the **Vehicle Request Form** button in the **Procurement Services Forms** section.



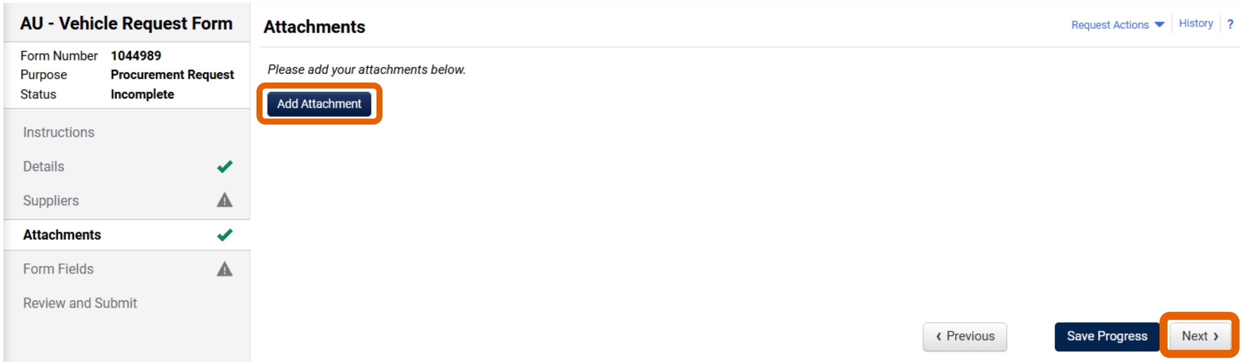
2. The **Vehicle Request Form** will appear. Read the instructions carefully and click **Next**.



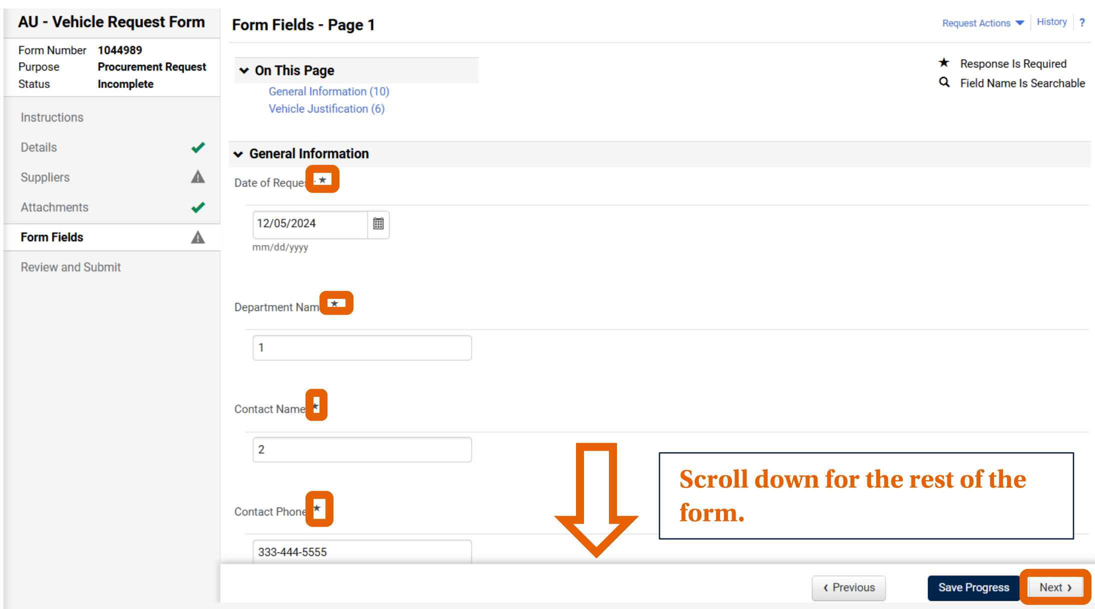
3. Fill in the supplier details. Search and select the correct supplier and click **Next**.



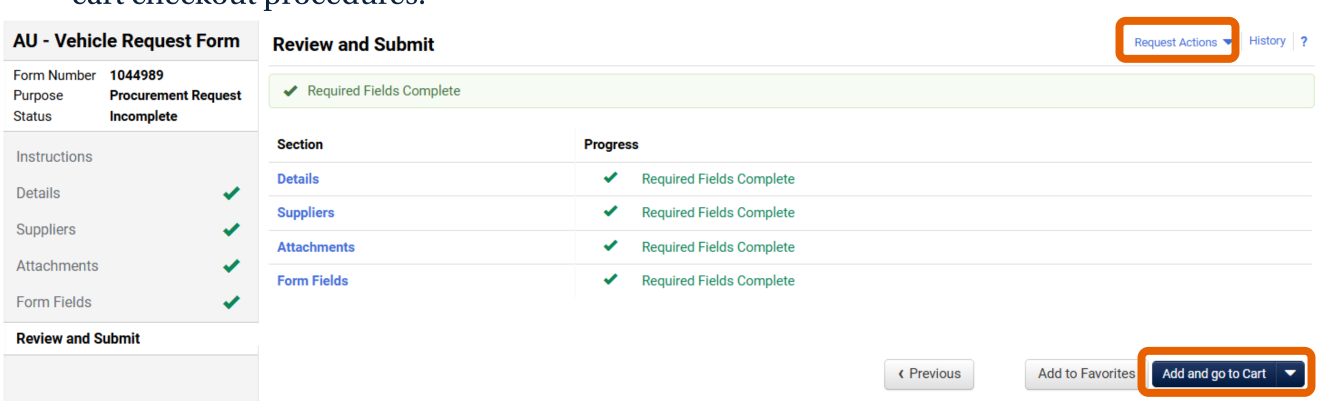
4. Add any attachments that need to be included in the Vehicle Request. When complete, click **Next**.



5. Next, fill in required information. All required information is marked with an asterisk (*). Click **Next**.



6. Confirm all sections are complete and click **Add and Go to Cart**. Follow the regular cart checkout procedures.



2.9 Submitting a New Supplier/Update Request

Target Audience: **Requisitioner**

AU Supplier Portal- http://aub.ie/supplier

Vendors seeking to do business with AU for the first time should register through the **AU Supplier Portal**, where you can handle many vendor-related tasks such as:

- Register to do business with AU
- Request to be added to the AU and/or AUM bid lists
- Updated vendor information
- Report commodities you offer
- Offer information on your SBA status
- Register for our payment direct deposit service

Please ensure you allow sufficient time for supplier onboarding to occur (typically 7-10 business days).

Auburn University TigerBuy

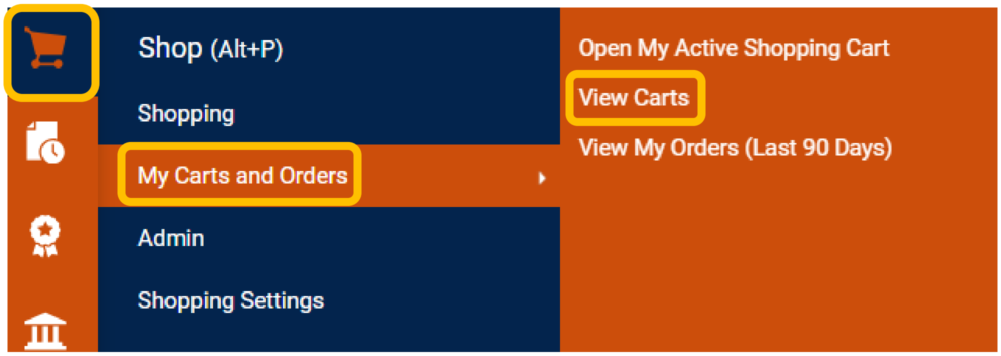
Module 3: Requisition Creation

AUBURN UNIVERSITY
Procurement and Business Services

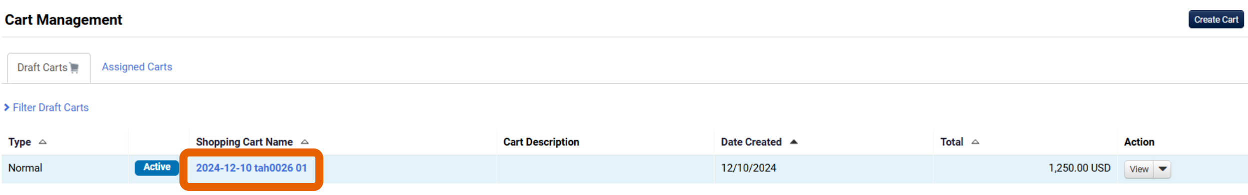
3.0 Modifying Draft Shopping Carts

Target Audience: **Requisitioner**

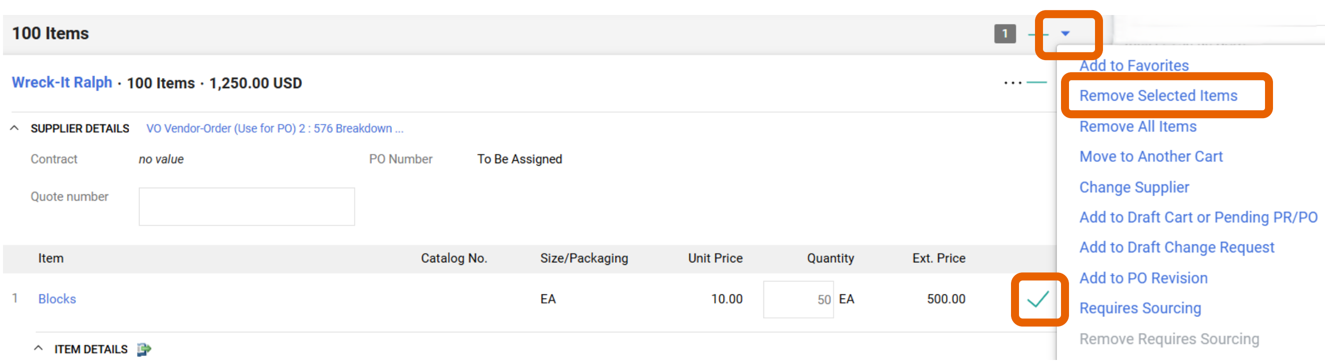
1. Once logged into TigerBuy, click the icon in the left-hand navigation bar, select **My Carts and Orders**, and **View Carts**.



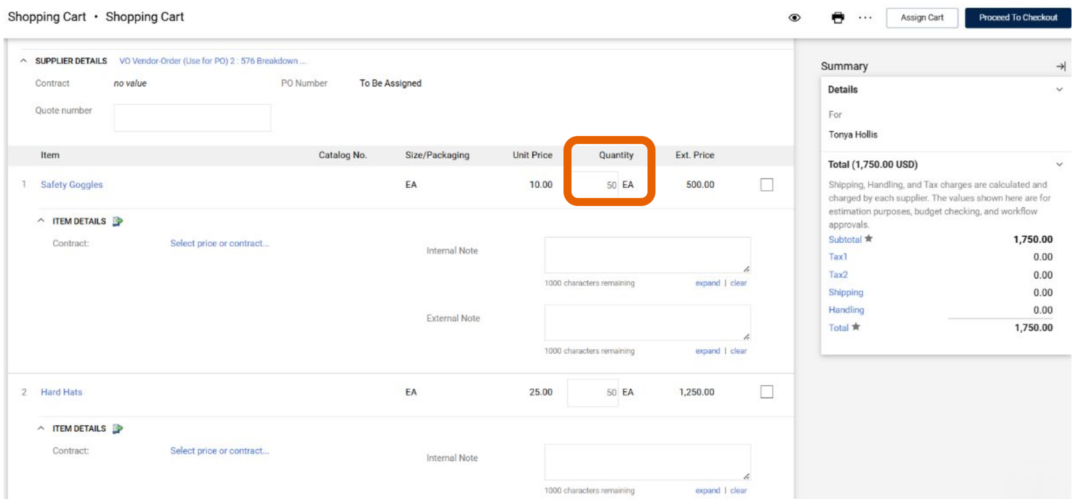
2. Your carts will appear as a list. Click the link of the **Shopping Cart Name** that you want to edit.



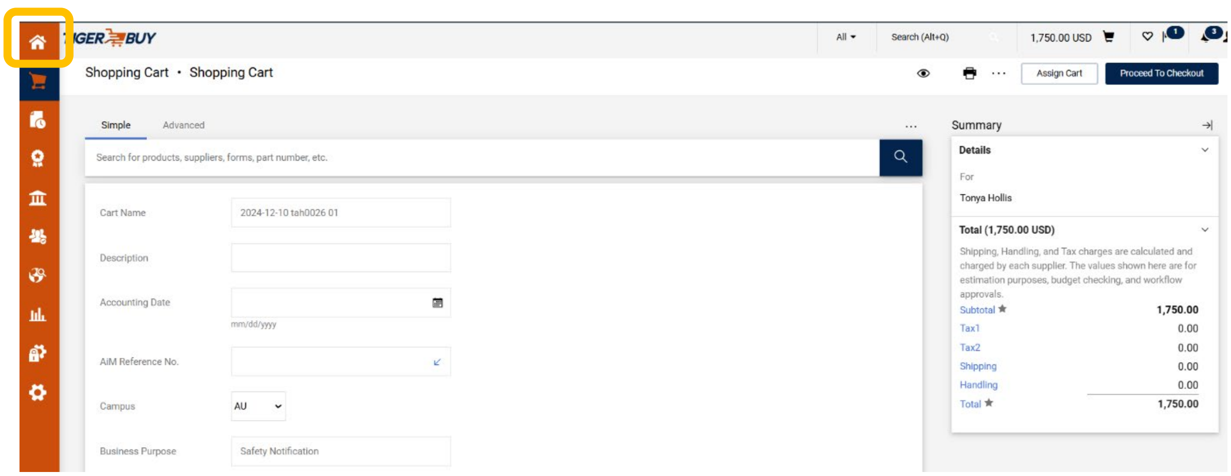
3. To remove individual items from your draft cart, navigate to the desired products and select the **Check Box** next to that item. Select the dropdown at the top of the item list and choose **Remove Selected Items**.



4. The product will be removed from the cart and additional edits can be made. To modify quantities, change to the correct quantity. Changes will be automatically saved.



5. To resume shopping, click the **Home** icon to return to the **Shopping Homepage**.

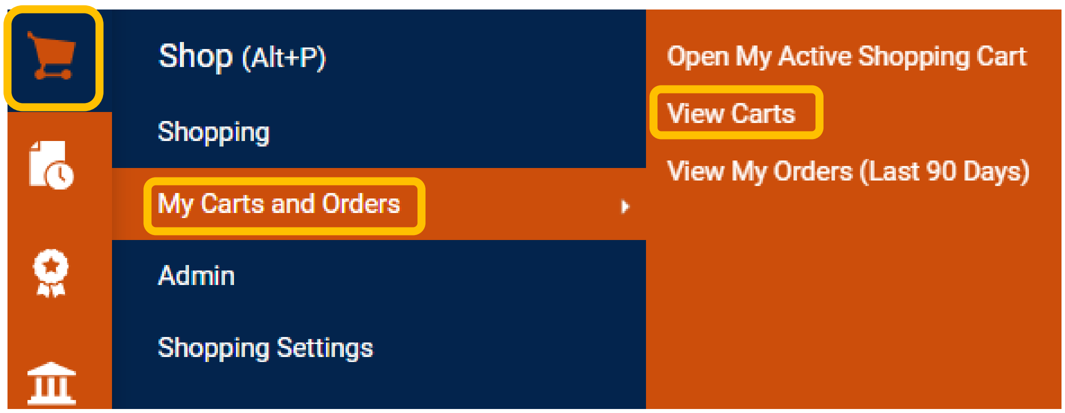


3.1 Deleting a Draft Cart

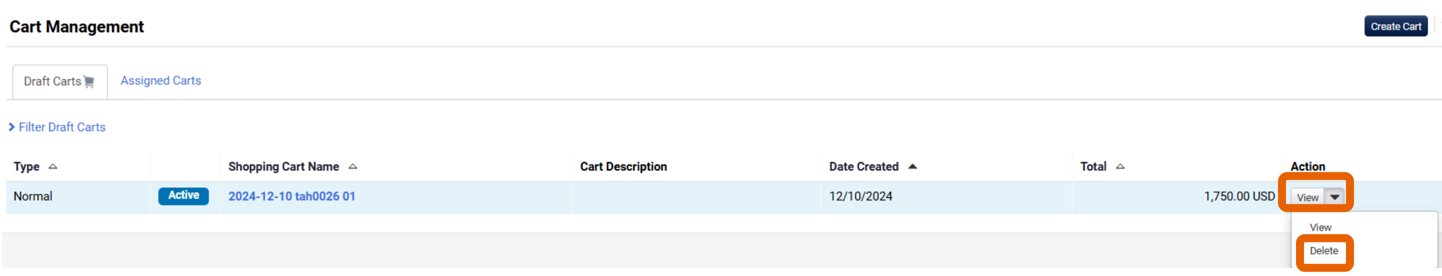
Target Audience: **Requisitioner**

If you have created a cart that you no longer need, the cart will need to be deleted.

1. Once logged into TigerBuy, click the **Shop** icon in the left-hand navigation bar, select **My Carts and Orders**, and **View Carts**.



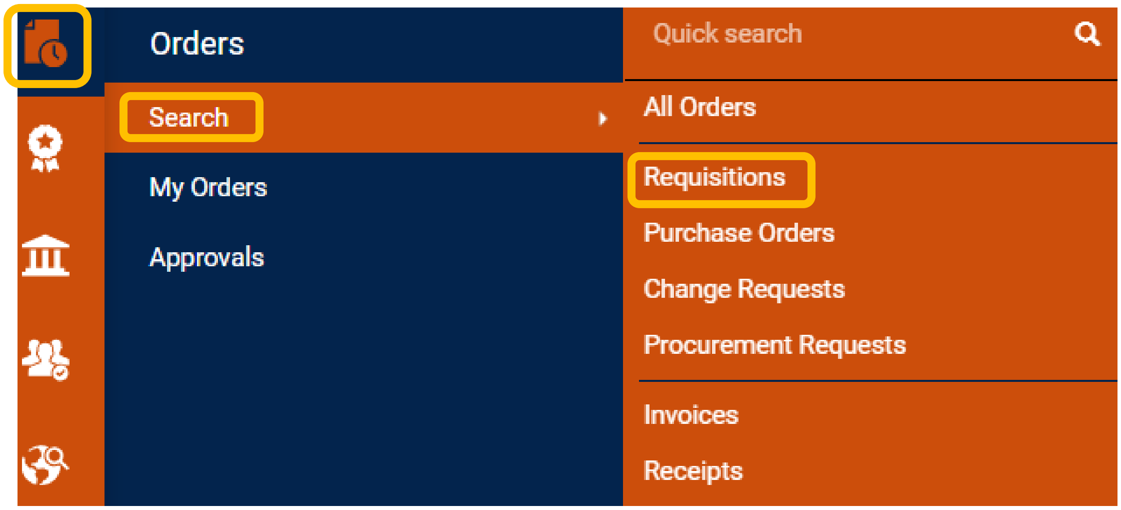
2. To delete, click the dropdown arrow and choose **Delete**. Your cart will then be deleted.



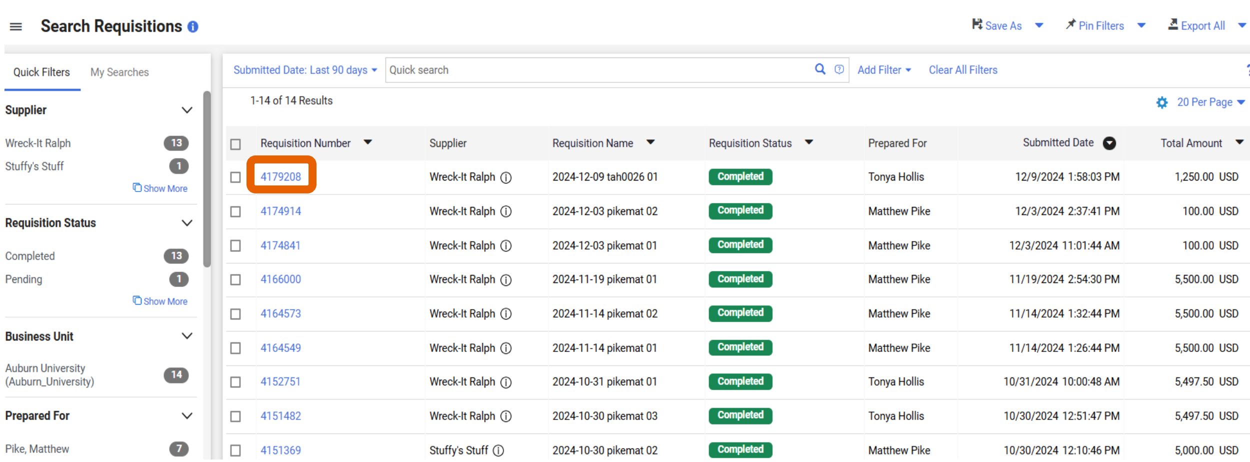
3.2 Creating New Shopping Carts by Copying Requisitions

Target Audience: **Requisitioner**

1. Once logged into TigerBuy, click the **Orders** icon in the left-hand navigation bar, select **Search**, and **Requisitions**.

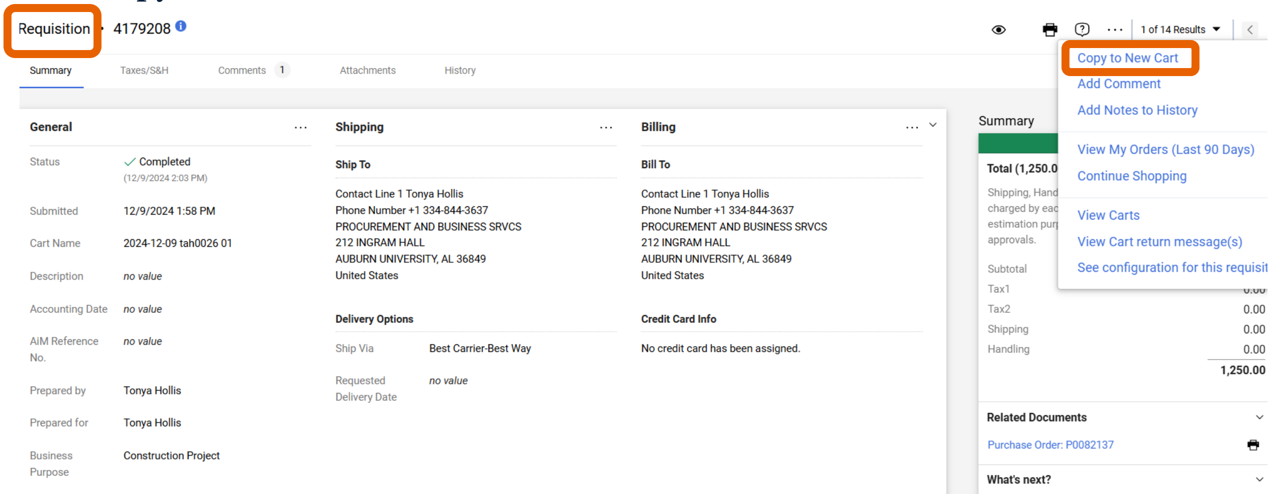


2. Requisition results will be displayed. If desired, you can filter requisition results using the filter criteria at the top of the requisition list. **Select** one of the requisition numbers.

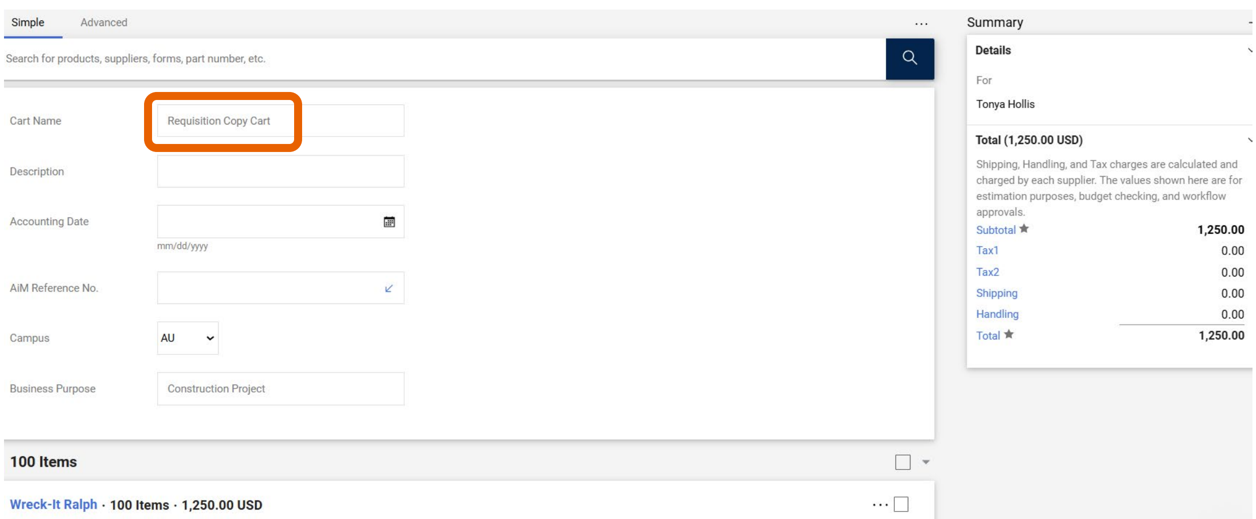


AUBURN UNIVERSITY
Procurement and Business Services

3. From the requisition summary page, select the **Requisition** dropdown menu and **Copy to New Cart**.



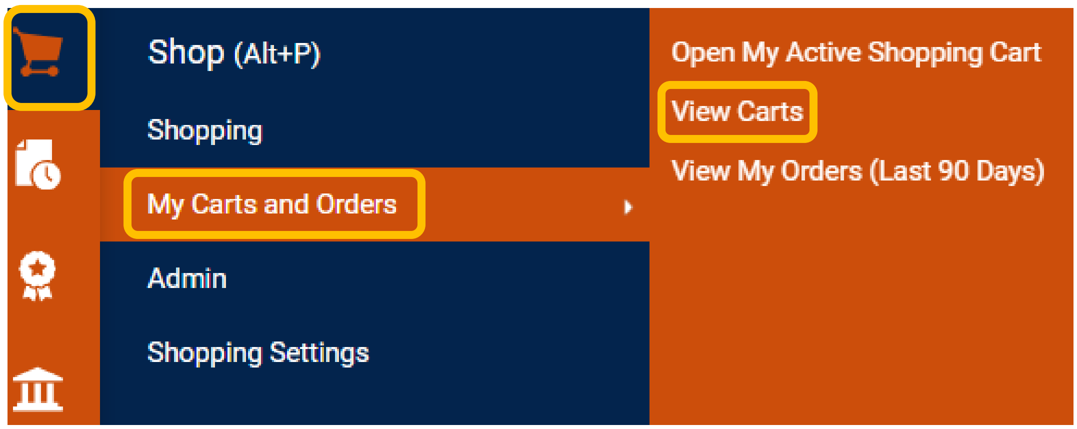
4. A new cart will be created with the items purchased from the previous requisition. If desired, enter a **Cart Name** for this cart. Any changes will be automatically saved.



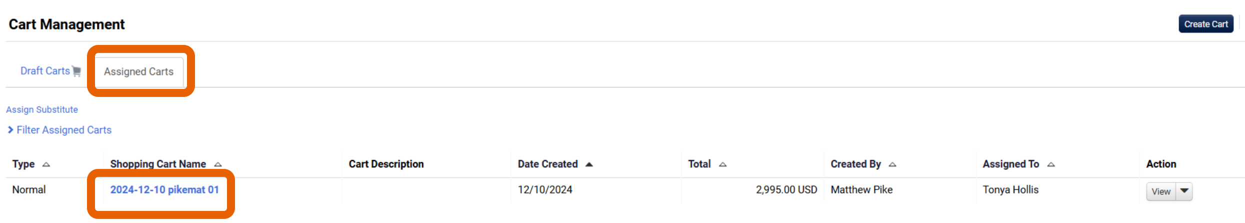
3.3 Adding Items to an Assigned Shopping Cart

Target Audience: **Requisitioner**

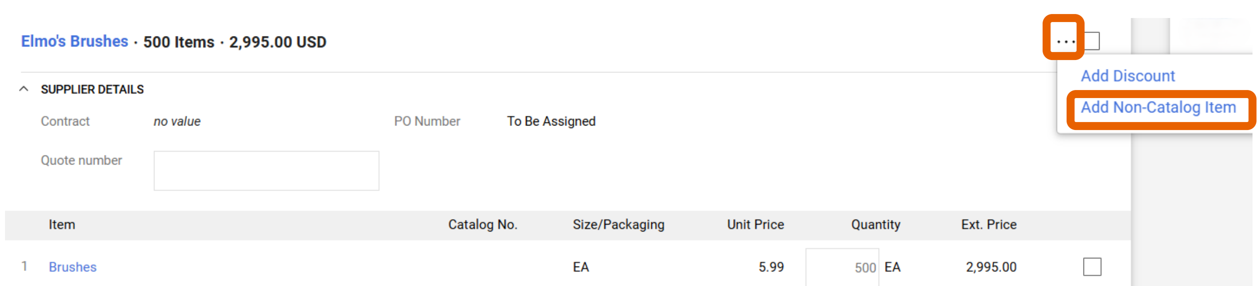
1. Click the icon on the left-hand navigation bar, select **My Carts and Orders**, and then **View Carts**.



2. Under **Assigned Carts**, select the shopping cart draft that is assigned by another user.

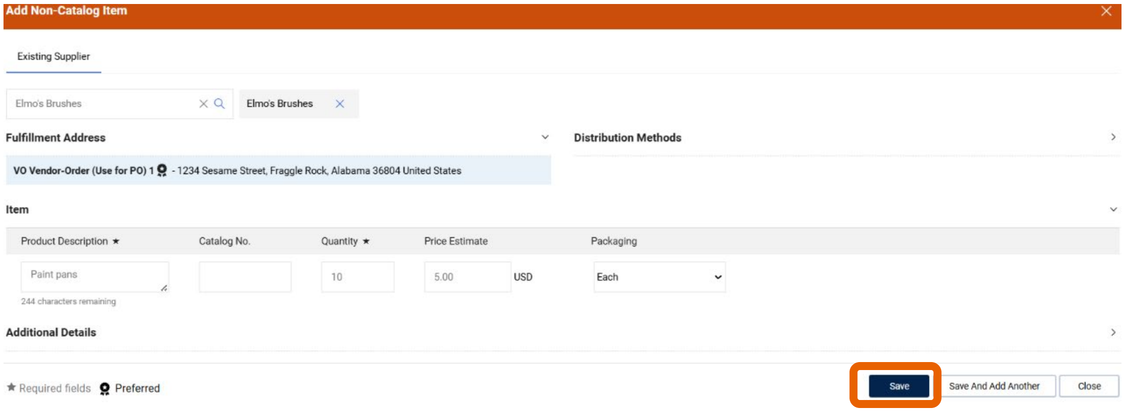


3. From the **Shopping Cart** webpage, click the **Supplier Actions button (...)** to reveal **Add Non-Catalog Item**, and select.

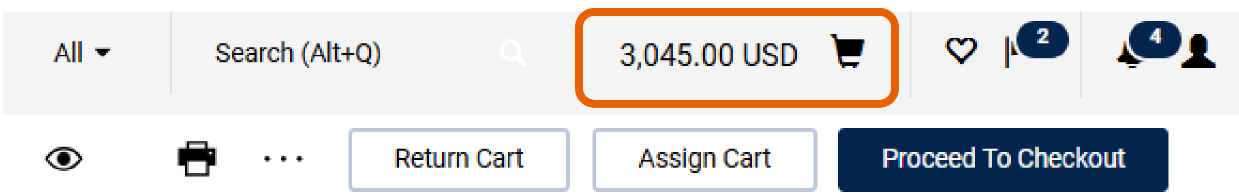


AUBURN UNIVERSITY
Procurement and Business Services

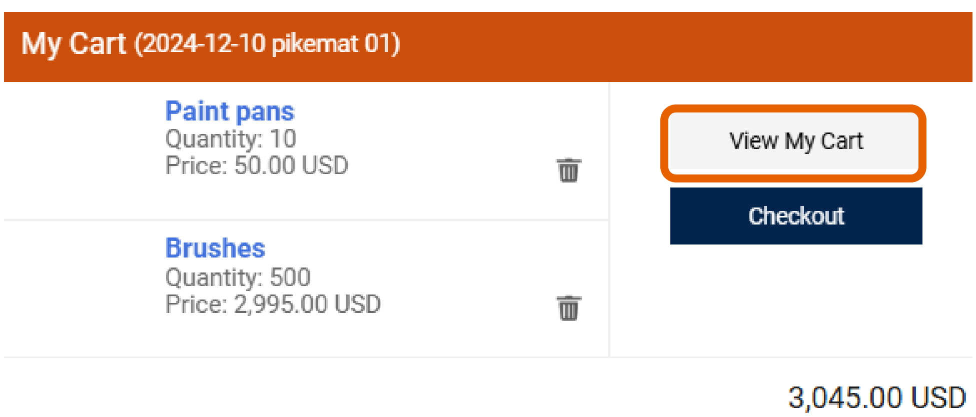
4. A box will pop up for you to **Add Non-Catalog Item**. Once you add the item(s) you need, click **Save**.



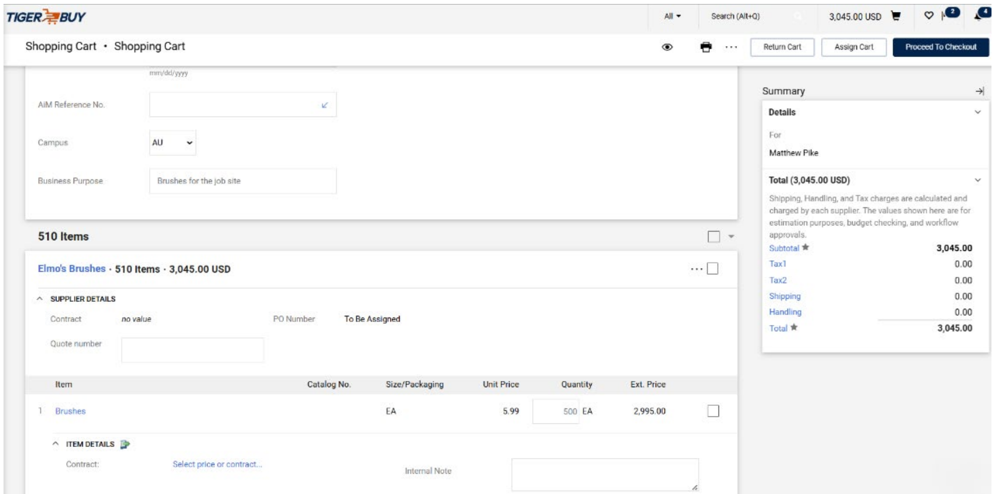
5. Click the **Cart Summary** in the top right-hand corner of TigerBuy to review the active cart.



6. A summary of the active cart will appear. To view the cart in greater detail, select **View My Cart**.



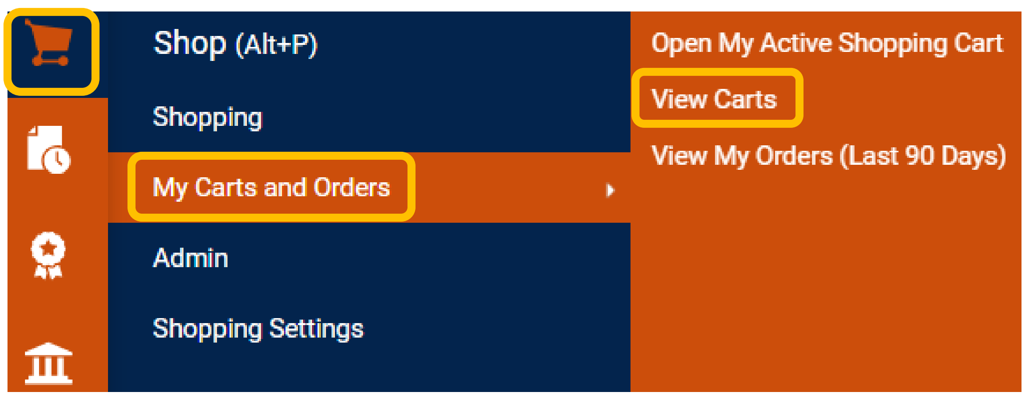
7. The details of your shopping cart will be displayed.



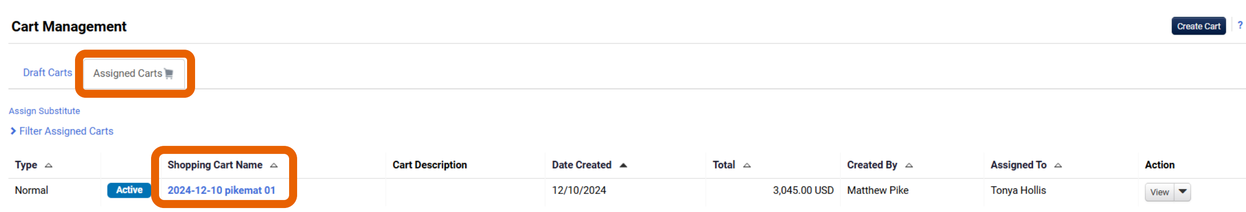
3.4 Editing Assigned Shopping Carts

Target Audience: **Requisitioner**

1. Click the icon in the left-hand navigation bar, select **My Carts and Orders**, and then **View Carts**.

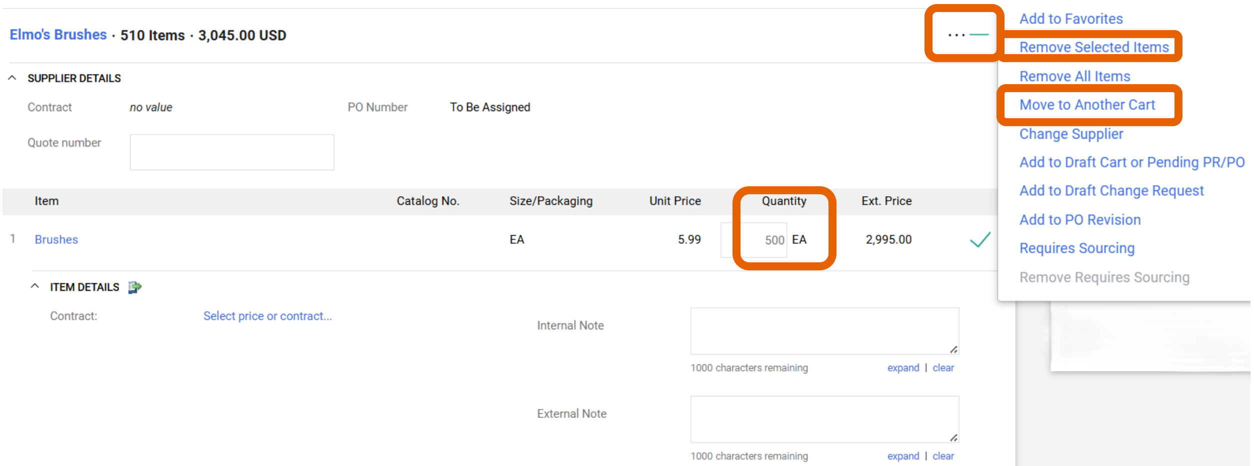


2. Select the **Assigned Carts** tab and choose and click the cart that needs to be edited.



AUBURN UNIVERSITY
Procurement and Business Services

3. The details of the shopping cart will appear, and users can edit the shopping cart. The following edits can be made from this page:
    a. Product Quantity Update- Change the quantity of the selected item.
    b. Remove Item- Delete the item from the current cart.
    c. More actions (...)- Requires Sourcing, Move to Another Cart, Add to Draft Cart, or Pending PO.



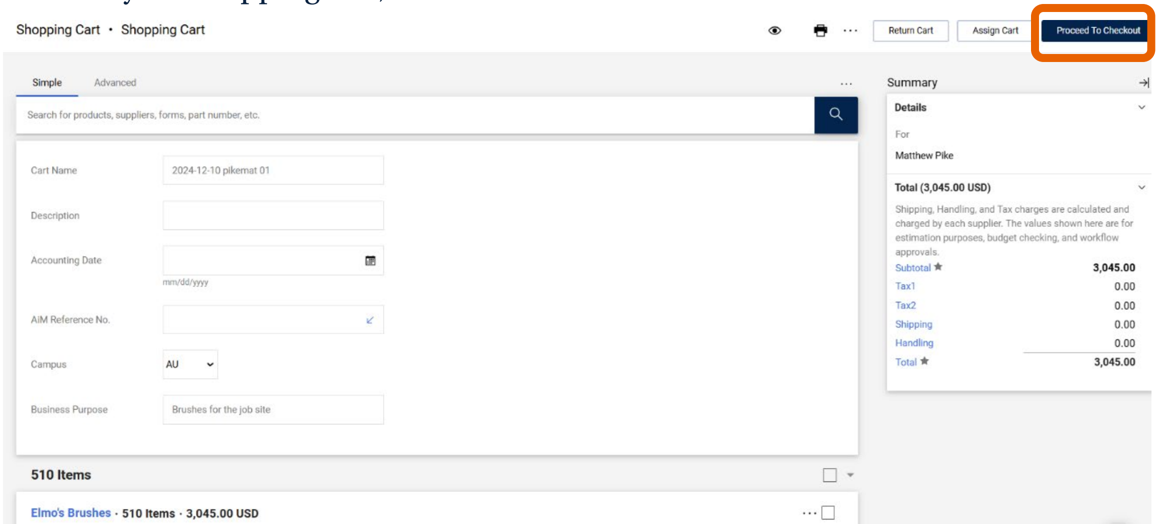
3.5 <u>Proceeding to Checkout</u>

Target Audience: **Requisitioner**

TigerBuy allows users to submit their orders or orders assigned to them by a system shopper. By submitting a requisition, the order may begin the approval process. The checkout process is accomplished through the cart's navigation tab.

1. Click the icon in the left-hand navigation bar, select **My Carts and Orders**, and **Open My Active Shopping Carts**.

2. From your shopping cart, click **Proceed to Checkout**.

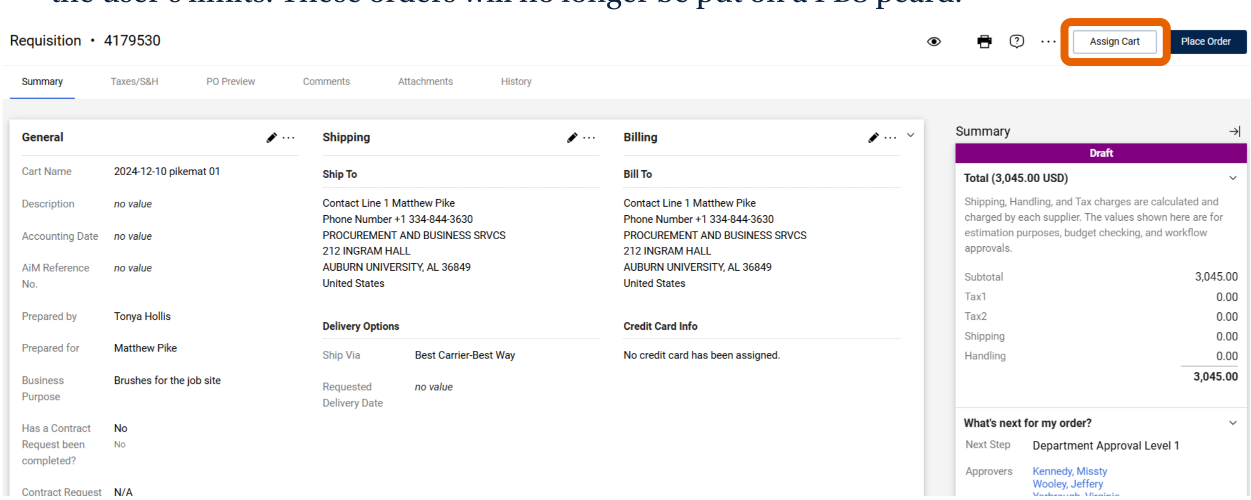


3. In a requisition, various details such as a shipping/billing address and accounting codes are associated with the order. When populating a cart, the default values from the user's profile are used. The accounting codes used in the header will be applied to all line items. Please refer to Section 3.7B for information on splitting accounting codes. If all details are complete, the cart is ready to be assigned to be approved by your department.

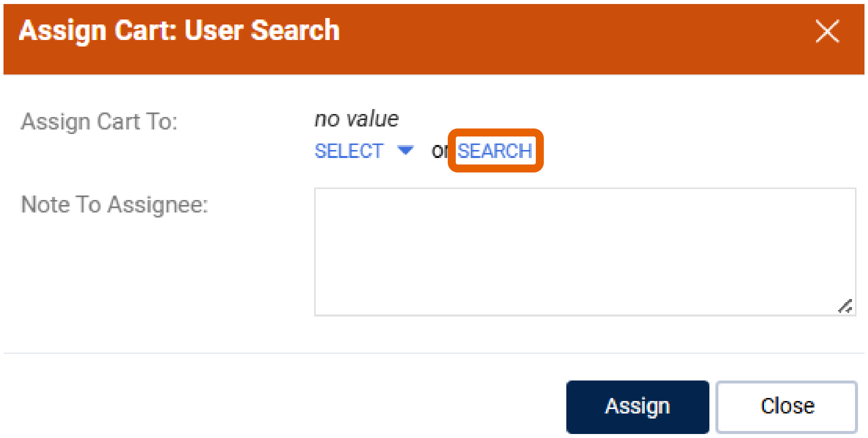
   If a shipping/billing address needs to be updated, please refer to **Section 7.6 Creating a New Address.**

   NOTE: For non-catalog orders less than $5,000, a requisitioner will be able to pay with a Pcard and checkout. For non-catalog orders over $5,000, the cart will need to be assigned for approval.

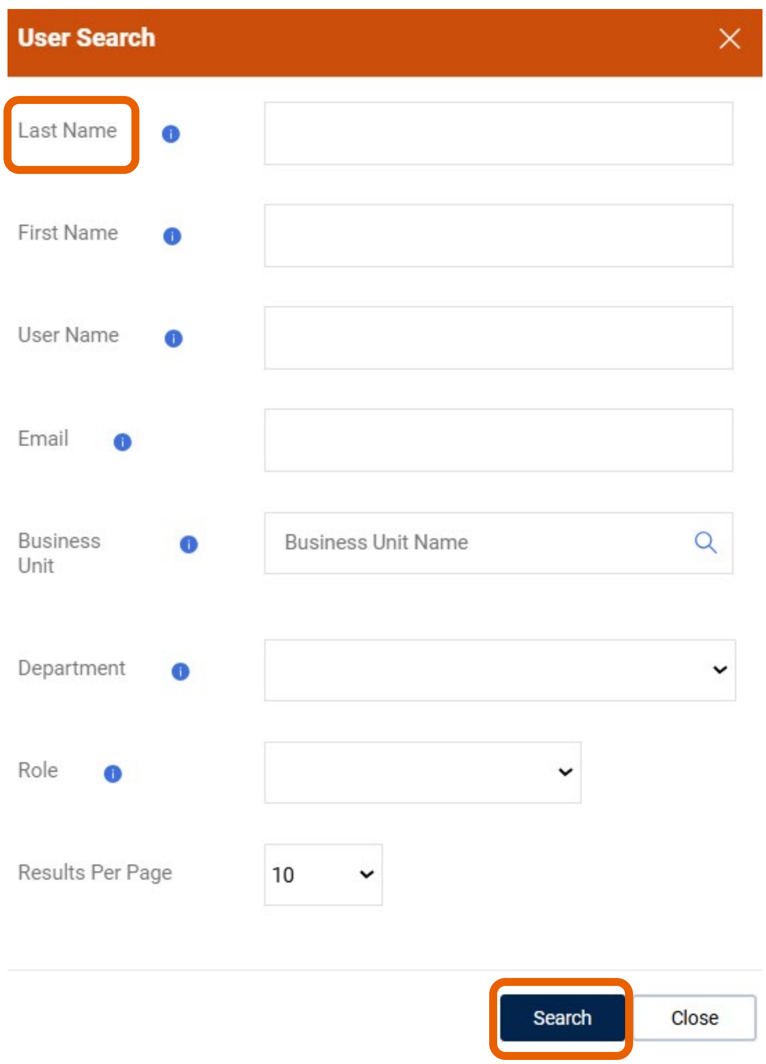
   For all punchout orders, even those greater than $5,000, a requisitioner should enter their department issued Pcard number in the billing field. If the amount of the purchase exceeds the user's transaction limits, the order will route to PBS to increase the user's limits. These orders will no longer be put on a PBS pcard.



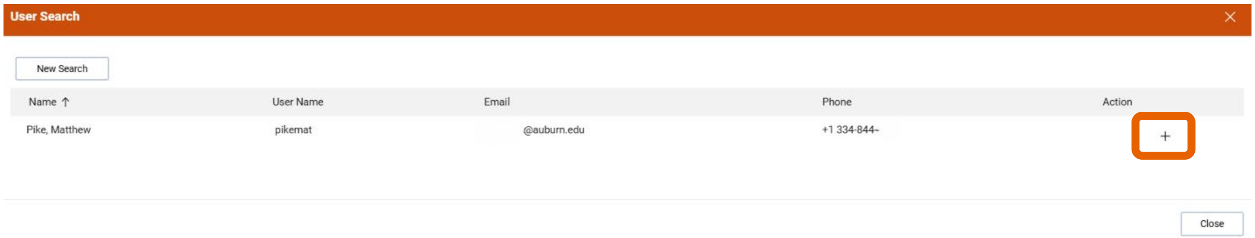
4. After clicking **Assign Cart**, a user search box will appear. Click **Search**.



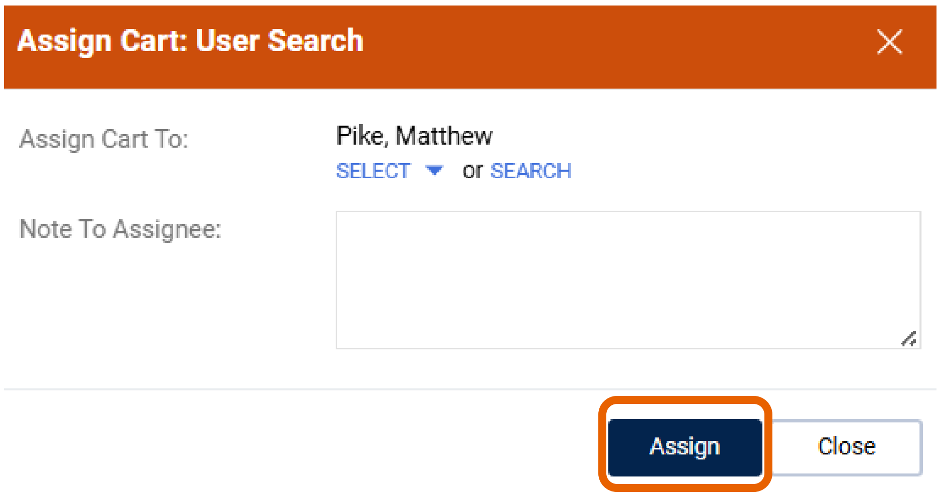
5. Search by last name (or whatever filter you choose) and click **Search**.



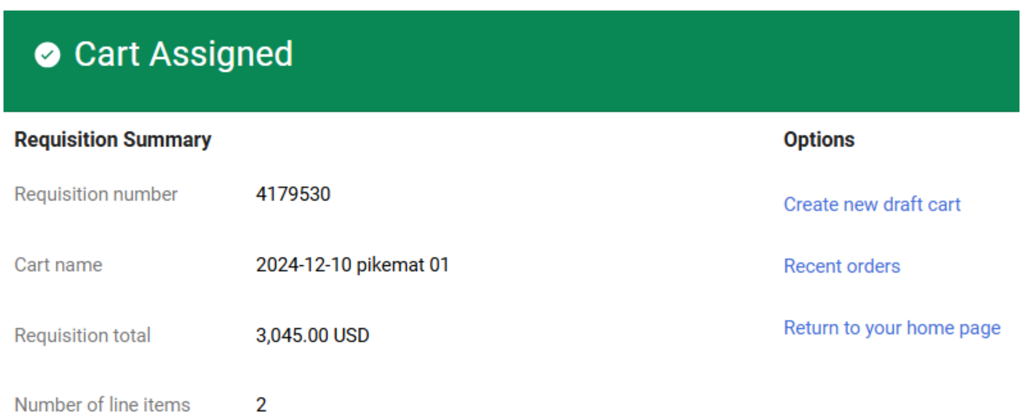
6. Click **+** to select the correct person to assign your cart to.



7. When you are taken back to the previous box, click **Assign**. Notice the name has been added.



8. A confirmation page will appear.

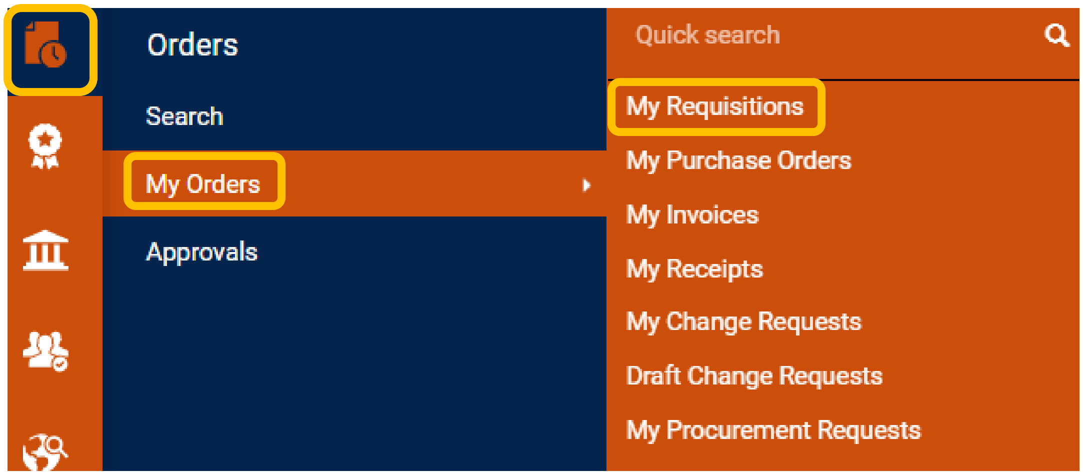


3.6 Withdrawing a Requisition from Workflow

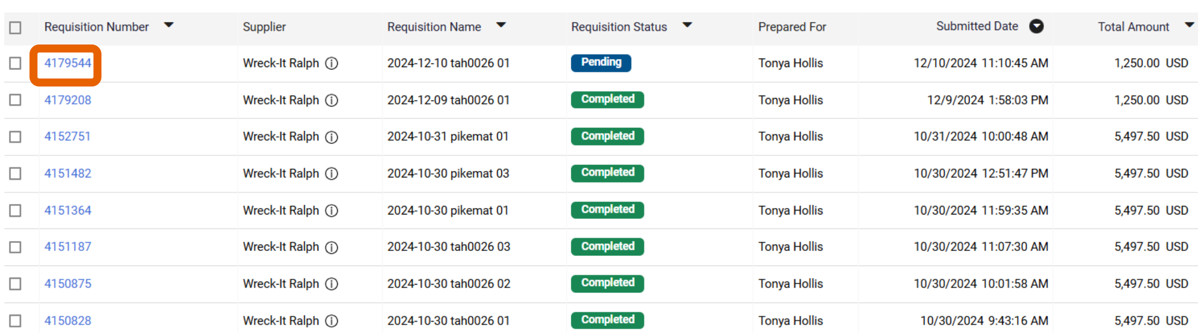
Target Audience: **Requisitioner**

Users are able to withdraw requisitions after they have been submitted and are in the workflow queue.

1. Select **Orders** from the left-hand navigation bar. Choose **My Orders**, then **My Requisitions**.

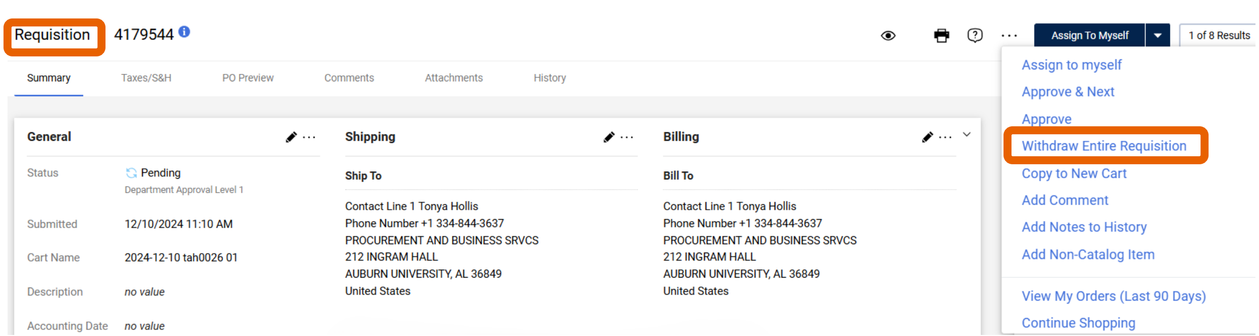


2. Choose the requisition you would like to withdraw and select the requisition number.



Requisition Number	Supplier	Requisition Name	Requisition Status	Prepared For	Submitted Date	Total Amount
4179544	Wreck-It Ralph	2024-12-10 tah0026 01	Pending	Tonya Hollis	12/10/2024 11:10:45 AM	1,250.00 USD
4179208	Wreck-It Ralph	2024-12-09 tah0026 01	Completed	Tonya Hollis	12/9/2024 1:58:03 PM	1,250.00 USD
4152751	Wreck-It Ralph	2024-10-31 pikemat 01	Completed	Tonya Hollis	10/31/2024 10:00:48 AM	5,497.50 USD
4151482	Wreck-It Ralph	2024-10-30 pikemat 03	Completed	Tonya Hollis	10/30/2024 12:51:47 PM	5,497.50 USD
4151364	Wreck-It Ralph	2024-10-30 pikemat 01	Completed	Tonya Hollis	10/30/2024 11:59:35 AM	5,497.50 USD
4151187	Wreck-It Ralph	2024-10-30 tah0026 03	Completed	Tonya Hollis	10/30/2024 11:07:30 AM	5,497.50 USD
4150875	Wreck-It Ralph	2024-10-30 tah0026 02	Completed	Tonya Hollis	10/30/2024 10:01:58 AM	5,497.50 USD
4150828	Wreck-It Ralph	2024-10-30 tah0026 01	Completed	Tonya Hollis	10/30/2024 9:43:16 AM	5,497.50 USD

3. Click **Requisition** dropdown menu and choose **Withdraw Entire Requisition**.



3.7 Splitting Accounting Charges

Target Audience: **Requisitioner**

Accounting codes can be split to distribute requisition amounts across multiple funding sources. There are two methods to split codes:

A. Header level- this is applied to the entire requisition.
B. Line level- this is applied to each line item individually.

A. Header Level Accounting

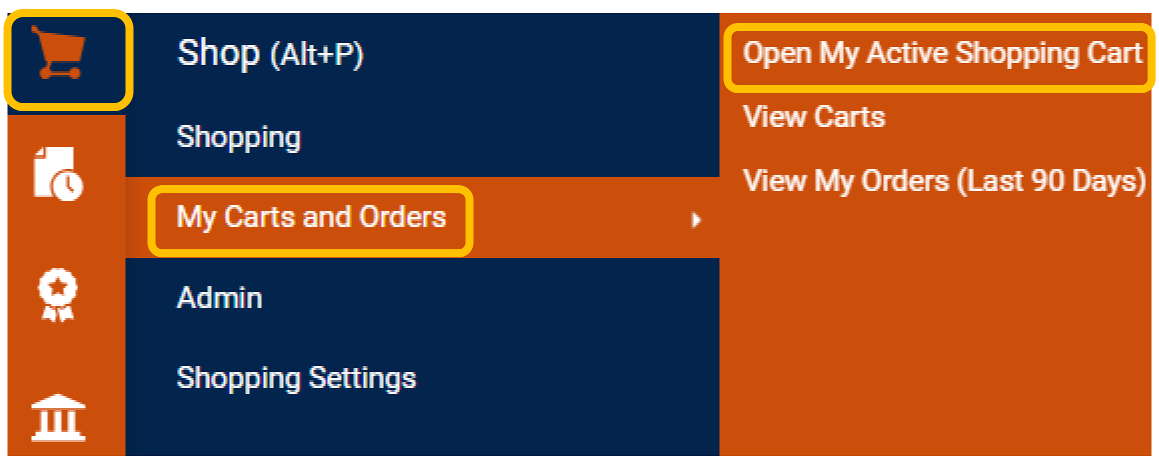
Header level accounting will be applied to each line of the requisition. If all line items on the requisition are to be paid from the same FOAP, the FOAP should be entered at the header level at the time of requisition creation.

At this time, the Auburn University Banner Finance system does not support the splitting of account codes at the header level. This information will not feed to Banner correctly and will cause invoices to pay improperly. **This function should not be used.**

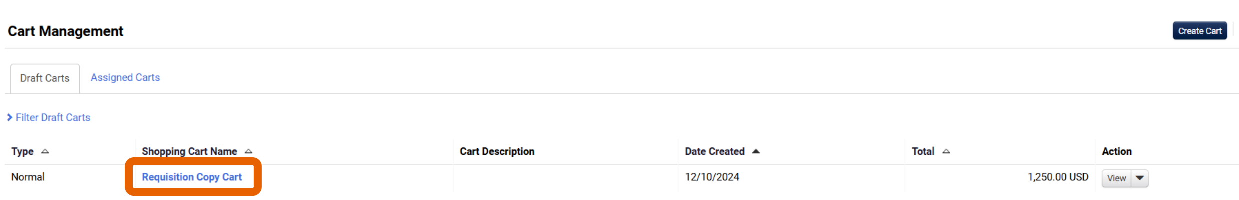
B. Line Level Accounting

Splits can accommodate a % of a price, % of quantity, or amount of price and is applied to all lines in the cart.

1. Click the icon in the left-hand navigation bar, select **My Carts and Orders**, and **Open My Active Shopping Cart**.

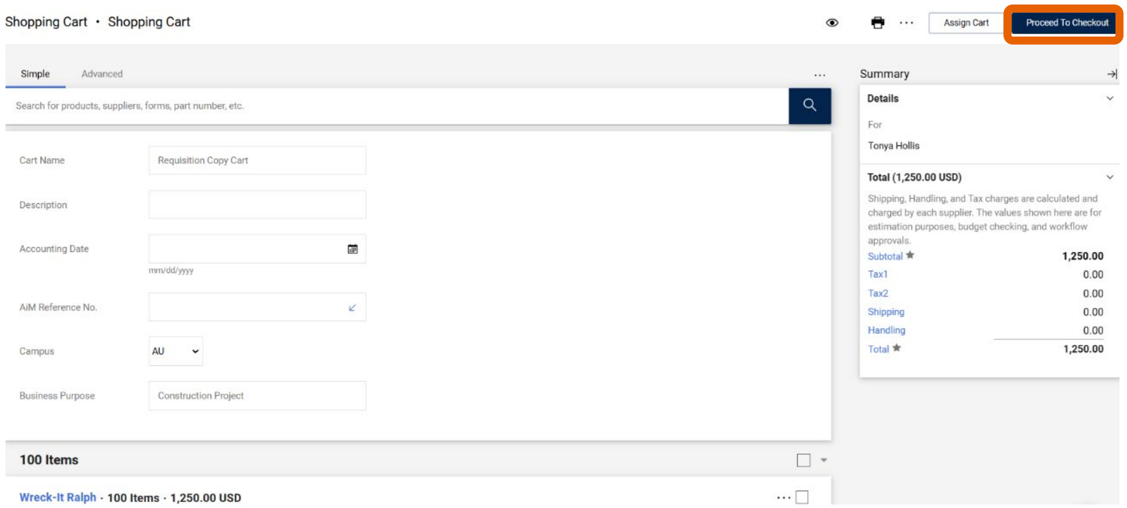


2. Select the needed requisition.

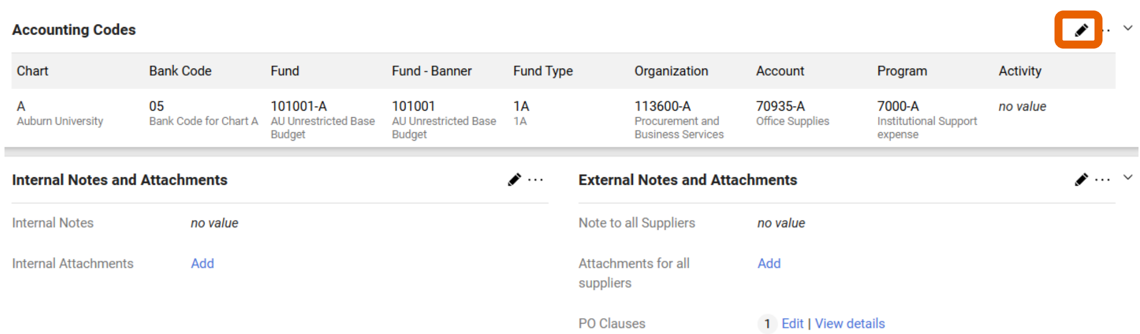


AUBURN UNIVERSITY
Procurement and Business Services

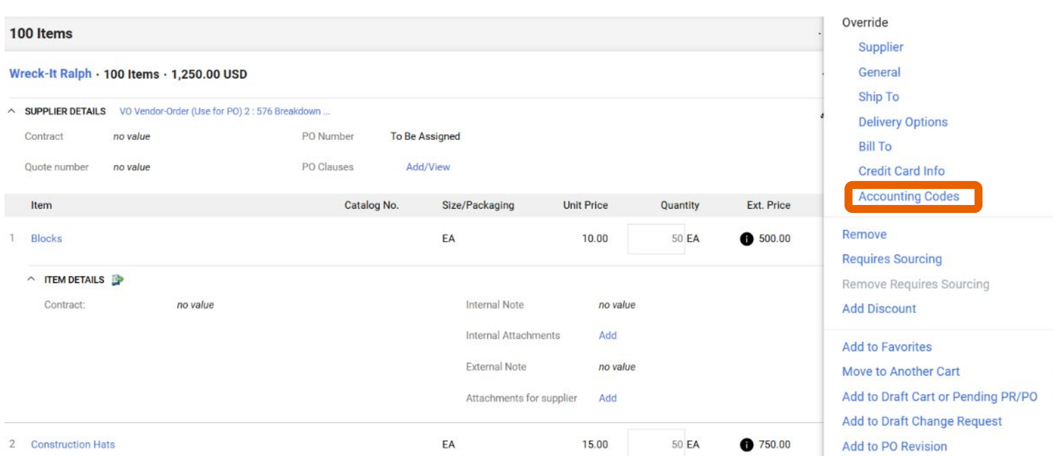
3. Select the **Proceed to Checkout** button.



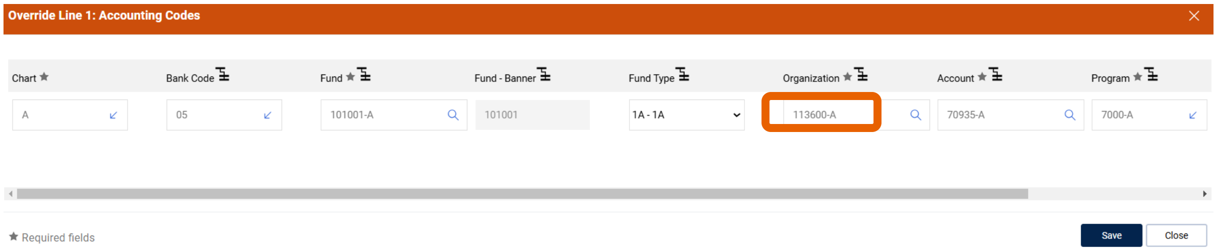
4. A final administrative review of the order is available for users to edit various details relating to the order. To edit accounting codes, select the **pencil** in the **Accounting Codes** section of the requisition. This accounting will be applied to the requisition as a whole.



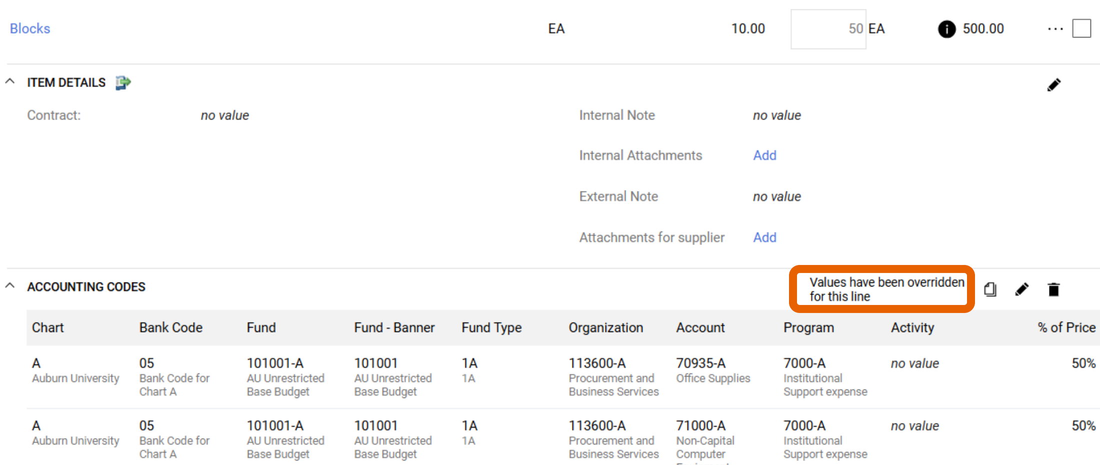
5. Scroll to each line item that you wan to apply different FOAPAL information. Click the **Supplier Actions button (…)** and select **Accounting Codes**.



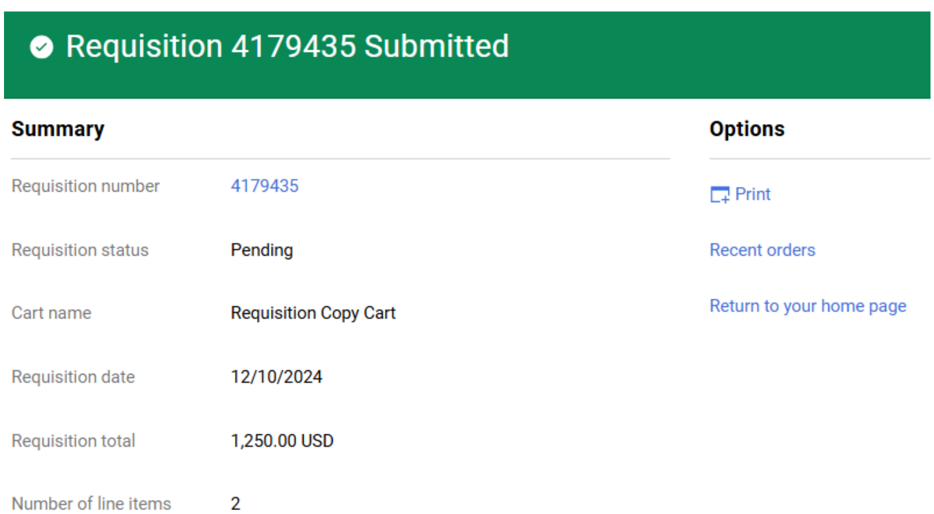
6. Change/Add any FOAPAL information to each line item that needs to be changed and click **Save**.



7. On the summary page, you can see where the header has been overridden and the new FOAPAL information is applied to the appropriate line items. Each line that needs to be overridden will need to be done individually.



8. Place order as usual and a confirmation screen will appear.



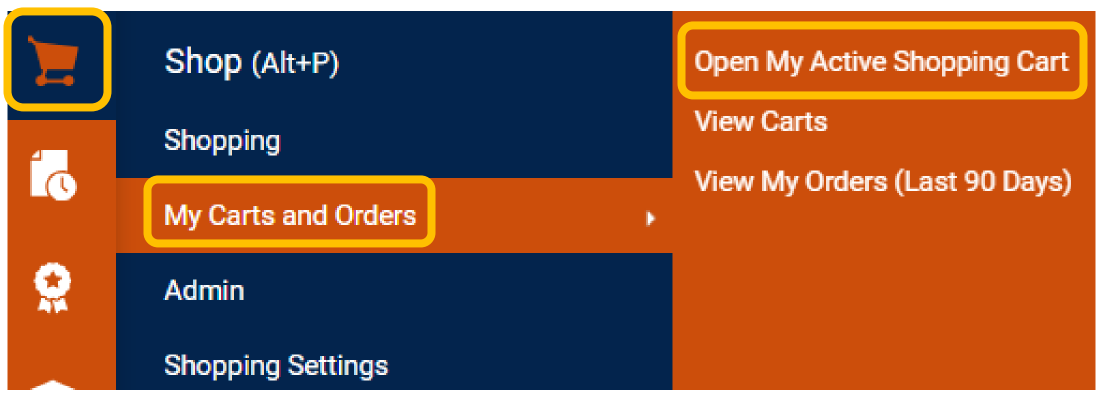
3.8 Adding Notes and Attachments

Target Audience: **Requisitioner**

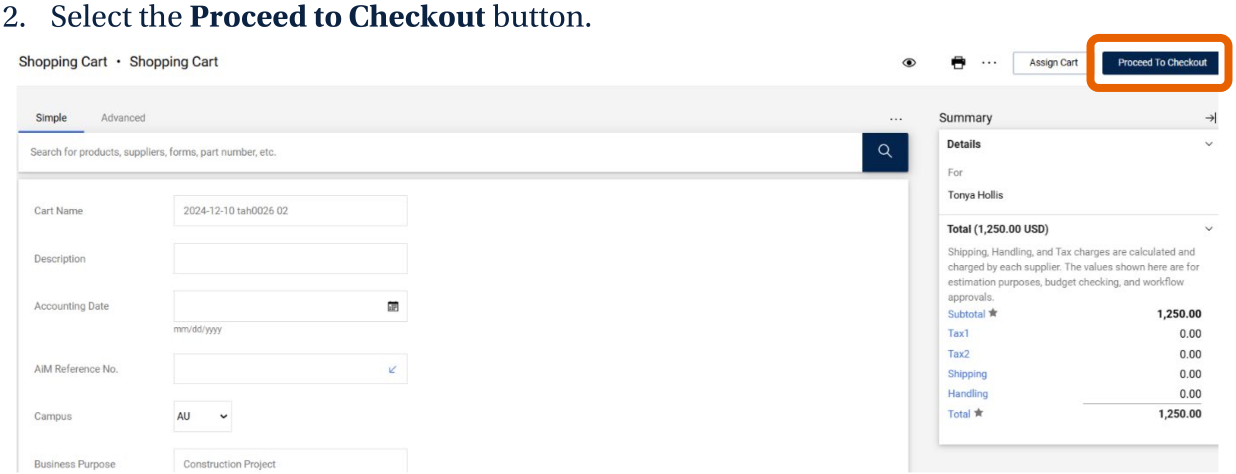
Users can add internal and external notes to the requisition. Users can also include attachments in various formats. Internal notes/attachments are not sent on to suppliers; they are available to approvers. External notes/attachments are sent to the supplier.

NOTE: Attachment file size cannot exceed 5MB.

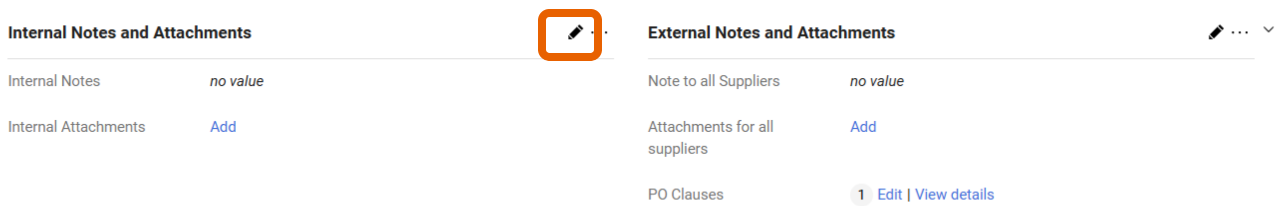
1. Click the icon in the left-hand navigation bar, select **My Carts and Orders**, and **Open My Active Shopping Cart**.



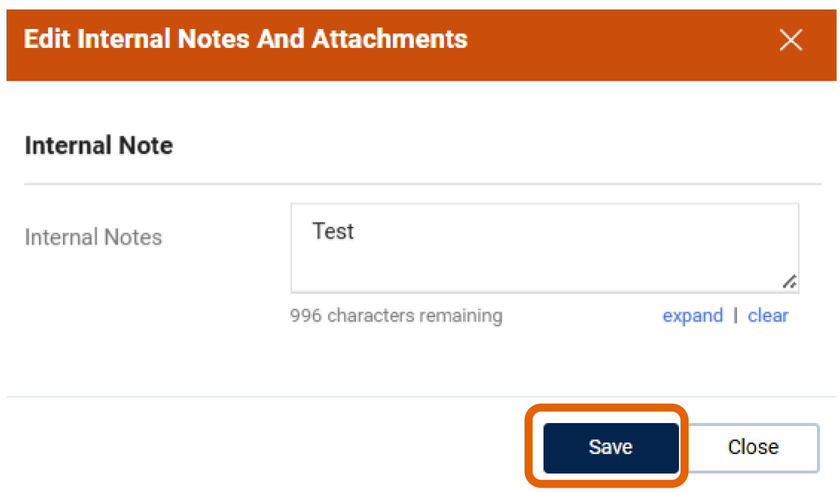
2. Select the **Proceed to Checkout** button.



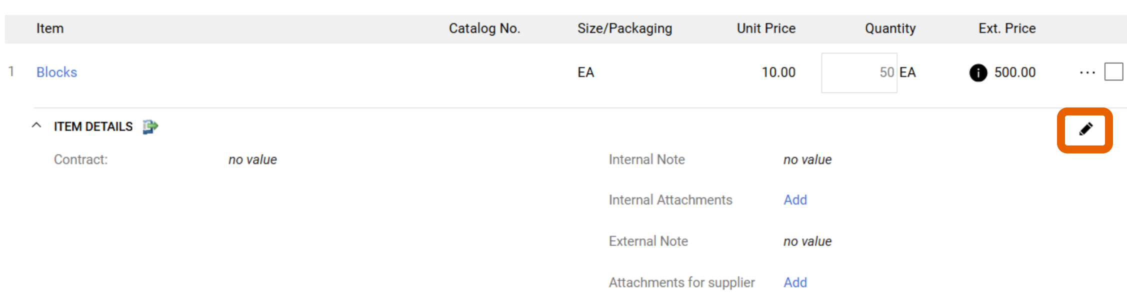
3. A final administrative review of the order is available to edit various details relating to the order. To add internal notes and attachments (i.e. quotes, disclosures, etc.) to an approved, click the **pencil** next to **Internal Notes and Attachments**. NOTE: to add external notes and attachments to an order for the supplier, follow the same process by selecting the **pencil** next to **External Notes and Attachments**.



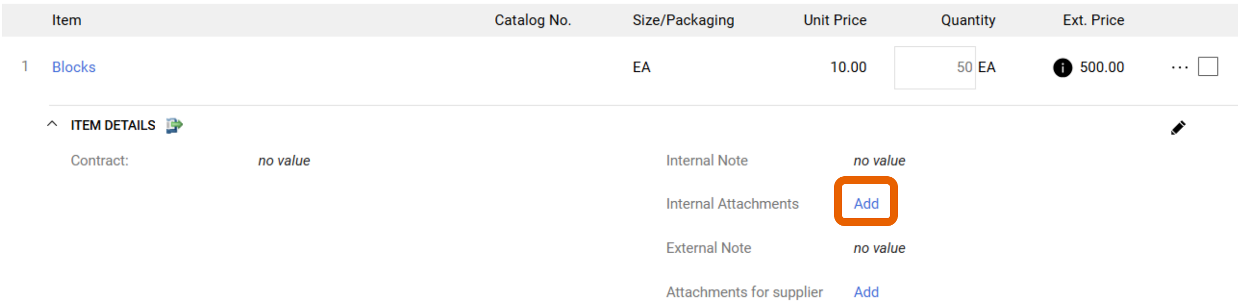
4. Enter the desired note and click **Save Changes**.



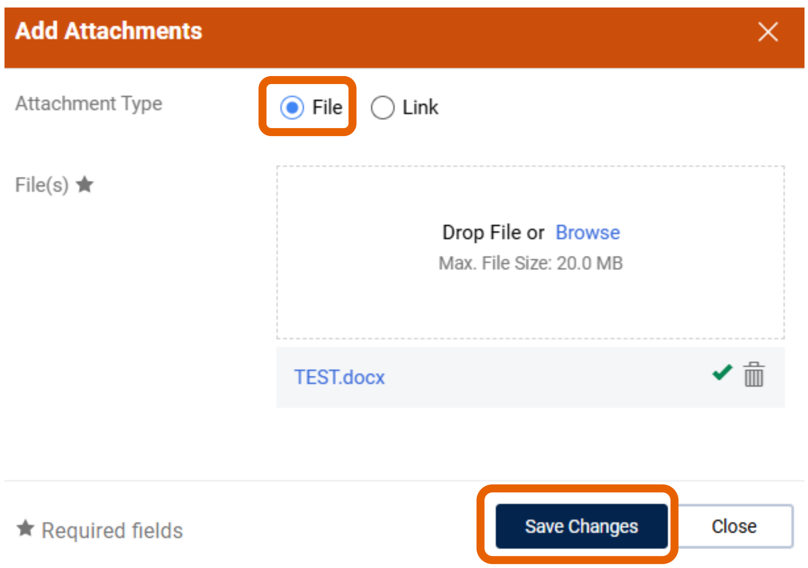
5. Internal or External notes can be added at the line level by selecting the **pencil** in the line level section and adding your note.



6. The internal note will appear in the **Internal Notes and Attachments** section of the page. To add an attachment, select **Add**.



7. Users may add an attachment or link to this portion of the requisition. To add a file, select the **File** option button and upload the desired file. Once the file is uploaded, the status should show a green check. Click **Save Changes**.



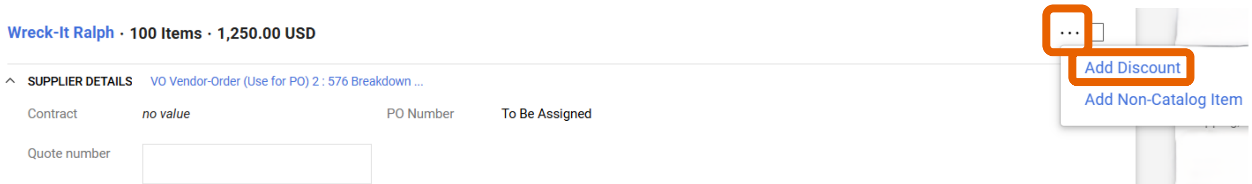
3.9 Applying a Discount in the Cart

Discounts can be applied on both the header level (adding a discount to all products from a specific supplier) and the line level. A discount can be an amount or a percentage.

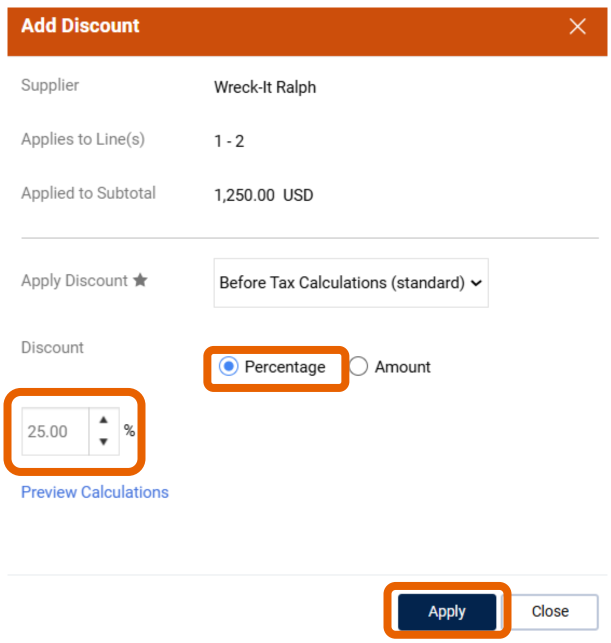
NOTE: This feature is used for applying MANUAL discounts. It is important for departments to establish best practices for using the feature to avoid erroneous discounts.

A. Header Level Discount

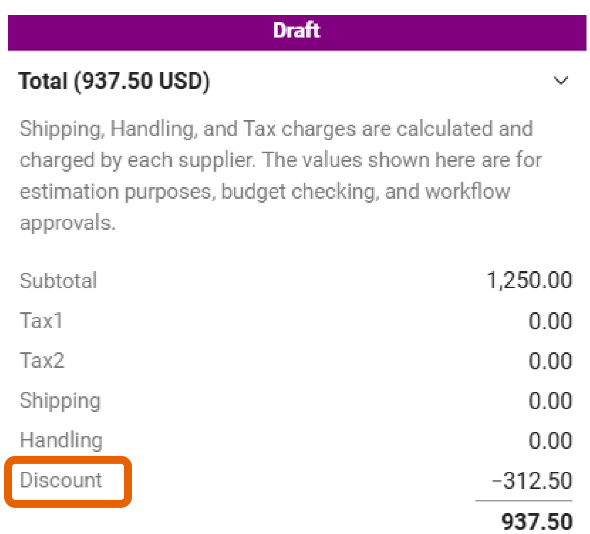
1. To add a discount at the header level, click the **Supplier Actions button (...)** on the supplier line and select **Add Discount**.



2. Choose and enter **Percentage** or **Amount** and click **Apply**.

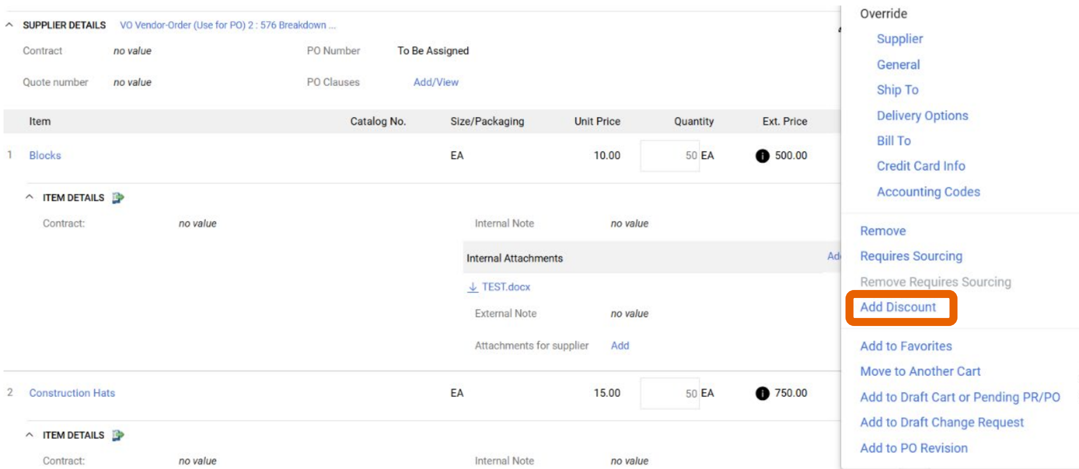


3. User will see the discount applied in the cart total section. Once discount is confirmed, proceed to checkout as normal.

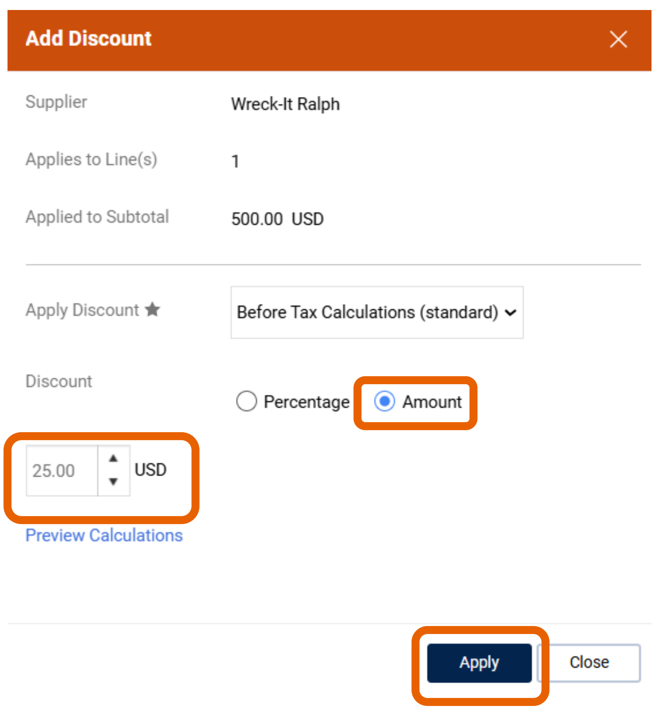


B. Line Level Discount

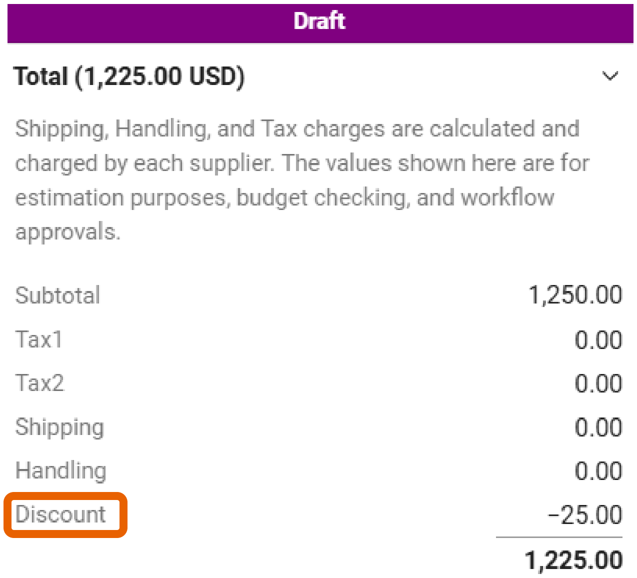
1. To discount at the line level, select the lines to be discounted by checking the box to the right of the line-item description. Click the Supplier Actions button (…) on the line to be discounted and select **Add Discount**.



2. Choose and enter **Percentage** or **Amount** and click **Apply**.



3. User will see the discount applied in the cart total section. Once discount is confirmed, proceed to checkout as normal.

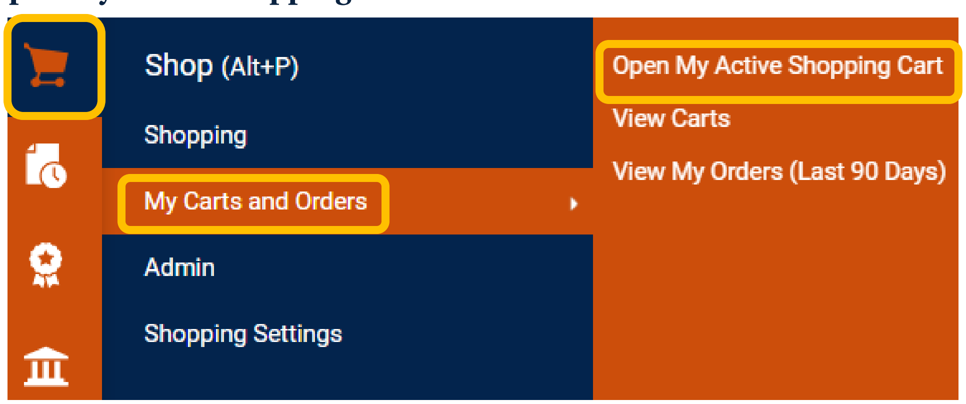


3.10 Adding Comments

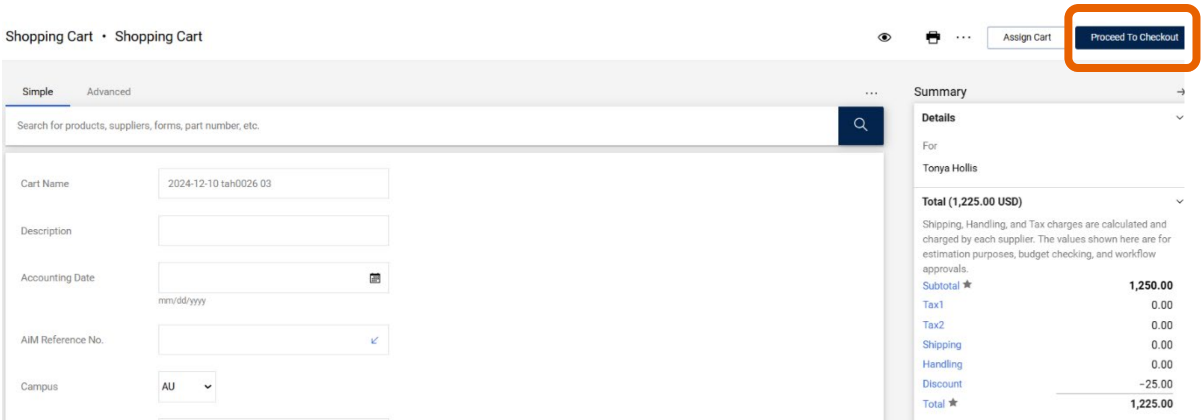
Target Audience: **Requisitioner**

Users can add comments to a requisition to add details about a requisition or to request information about a requisition. Users can select who should be notified about the comment addition through an email notification.

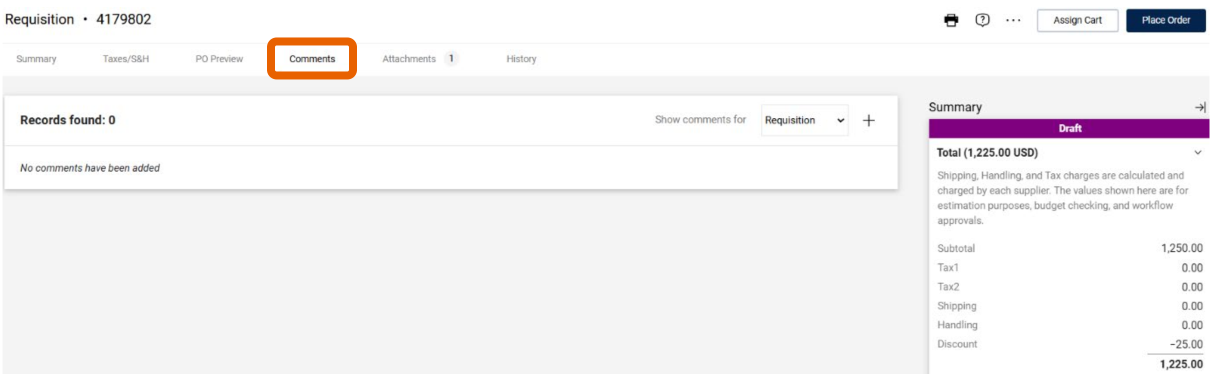
1. Click the icon in the left-hand navigation bar, select **My Carts and Orders** and **Open My Active Shopping Cart**.



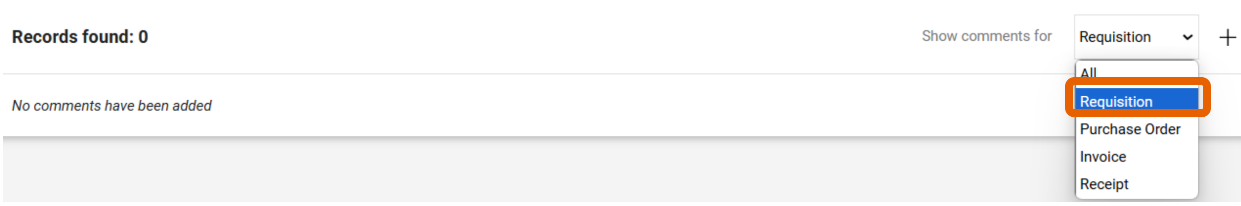
2. Select the **Proceed to Checkout** button.



3. A final administrative review of the order is available for users to edit various details relating to the order. In the tabs across the top of the requisition, select **Comments** to add a comment.

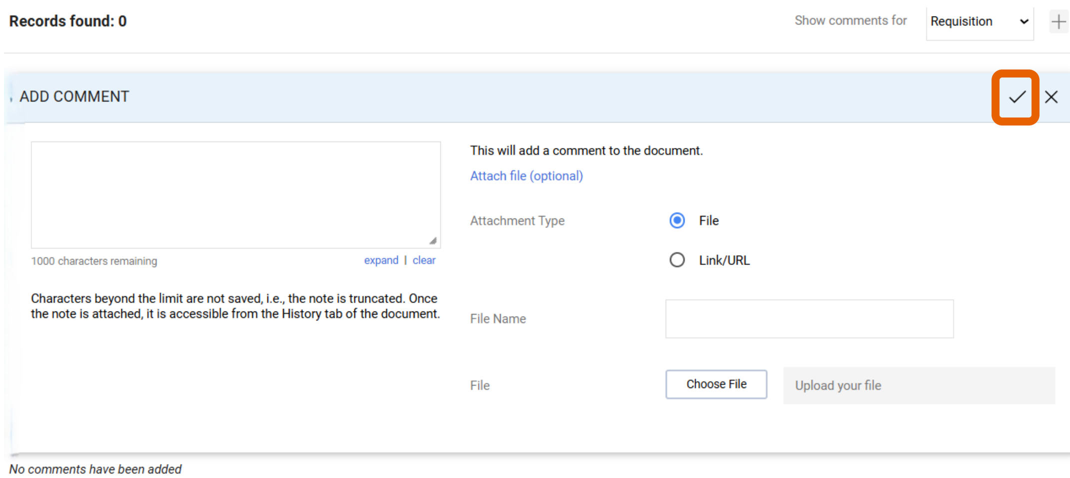


4. Users can add comments regarding requisitions, purchase orders, invoices, and receipts by selecting the desired document in the dropdown menu.



5. After the document is selected for comments, click the **+** to add comment.

6. Add the comment to the comment section and click the **check** to add comment. Attachments can be added to this section if desired.

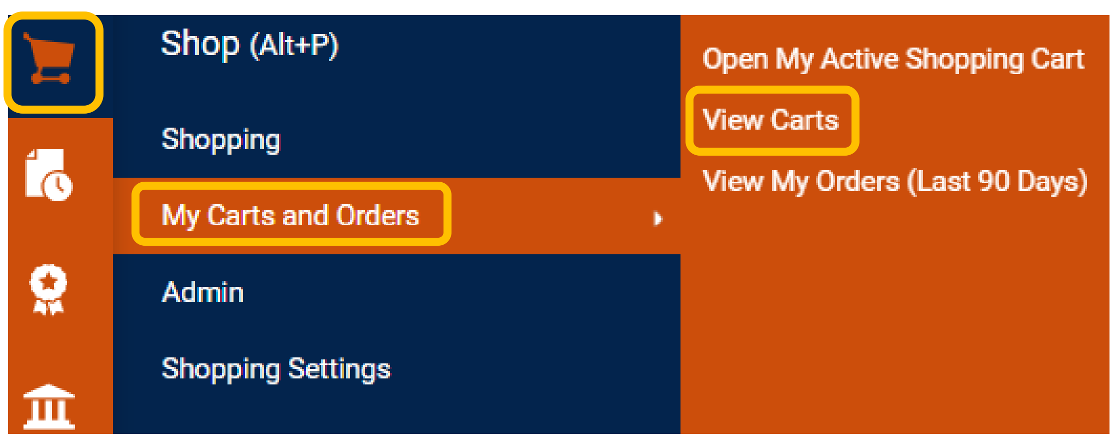


3.11 <u>Editing Returned Requisitions</u>

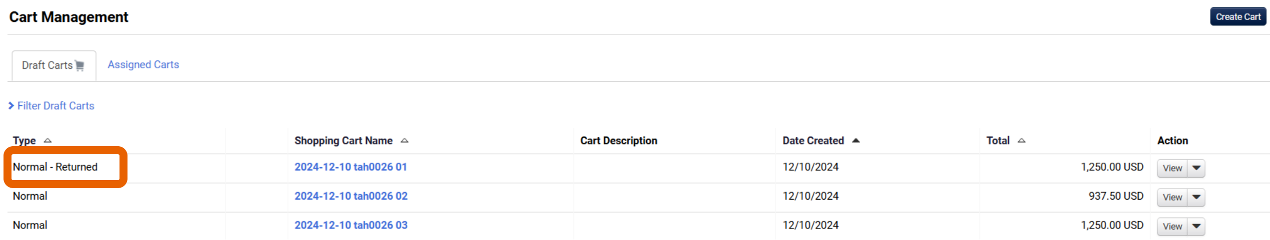
Target Audience: **Requisitioner**

An approver has the ability to return the purchase requisition (PR) to the Requisitioner for any changes/updates that need to be made. When a requisition is returned by the Approver, it reverts to a draft shopping cart.

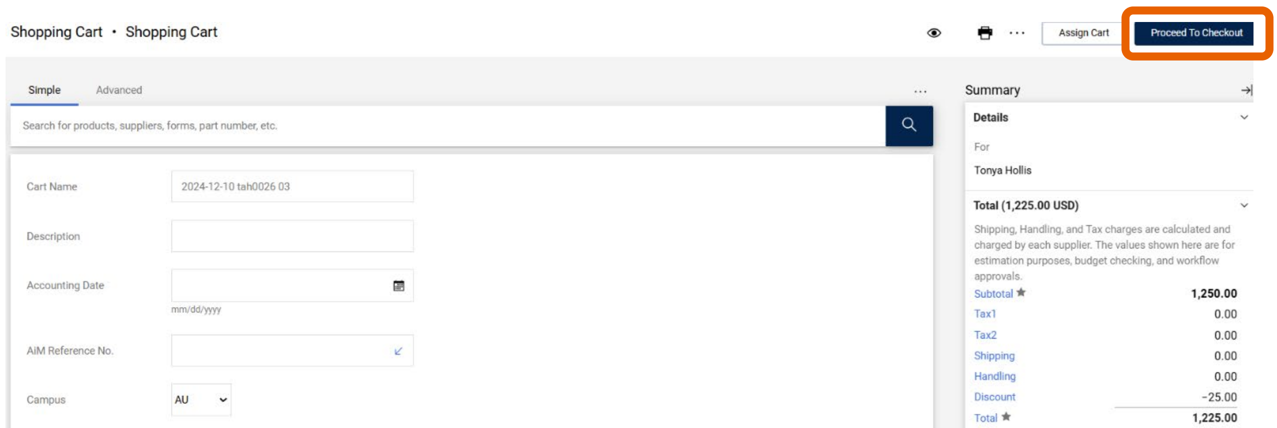
1. Click the icon in the left-hand navigation bar, select **My Carts and Orders,** and then **View Carts**.



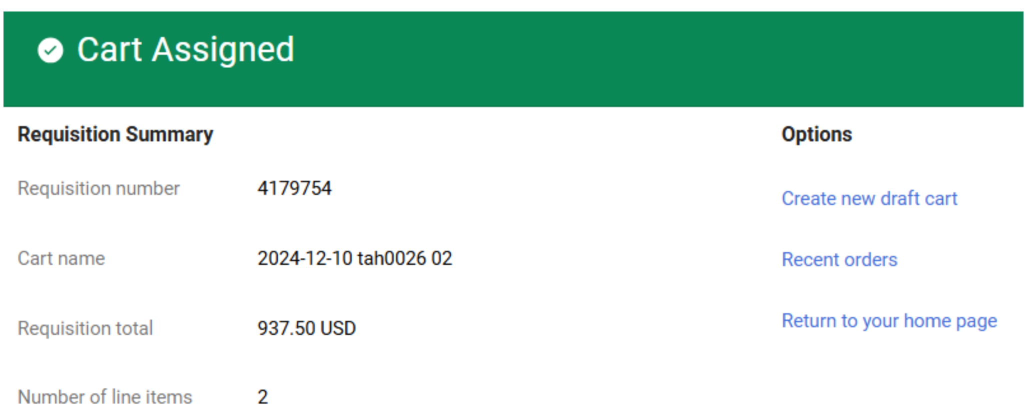
2. Within the **View Carts** page, find the returned carts by looking for **Returned** beside the type. Select the cart to edit.



3. Once the requisition is open, it becomes an **Active Cart**. Select the **Proceed to Checkout** button.



4. Users can add items to the cart and submit or assign cart after changes have been made.

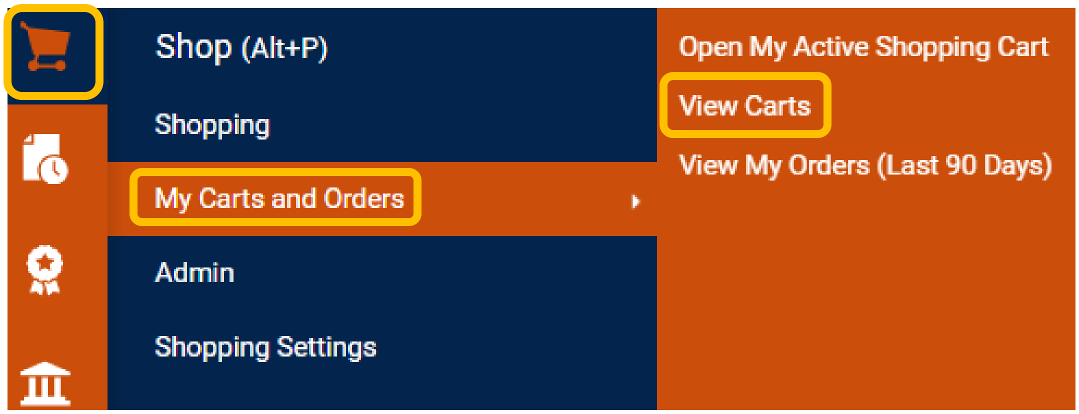


3.12 Previewing Requisition Workflow and Purchase Orders

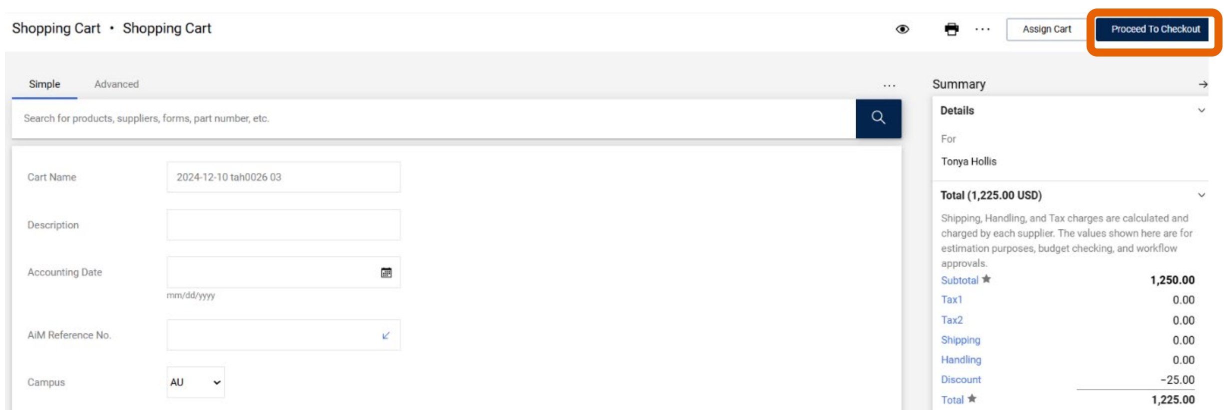
Target Audience: **Requisitioner**

Prior to submitting a purchase requisition, users can preview the requisition workflow and purchase orders from the **Draft Requisition/Final Review** page.

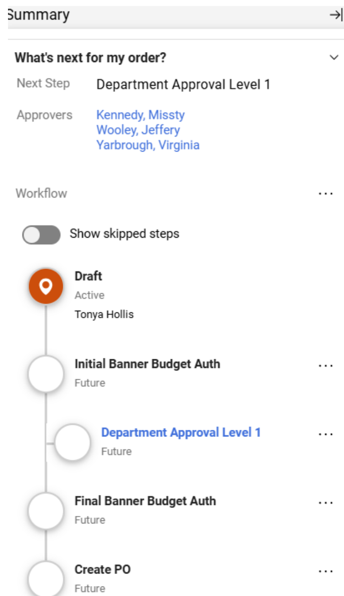
1. Click the icon in the left-hand navigation bar, select **My Carts and Orders**, and then **View Carts**.



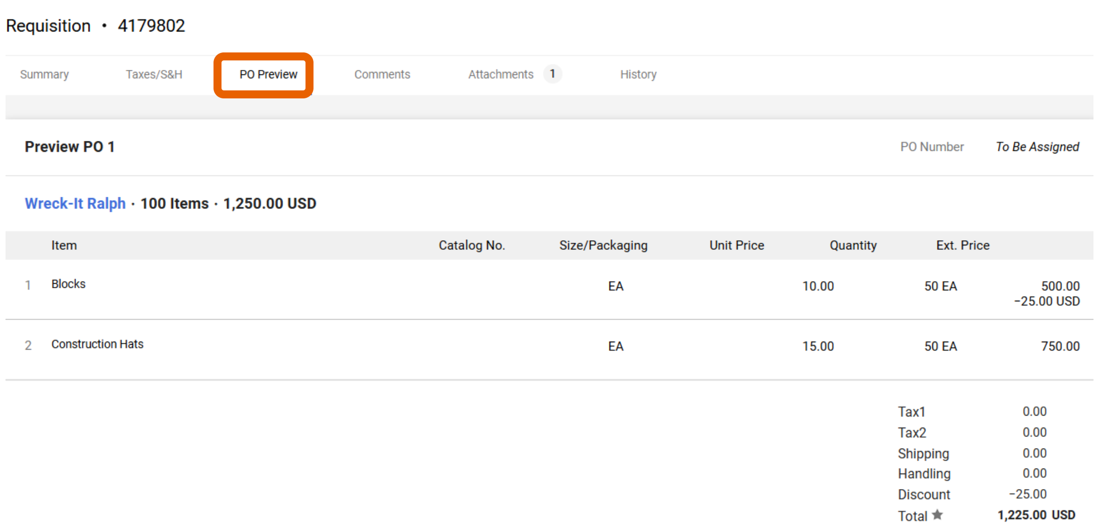
2. Choose your cart, then select the **Proceed to Checkout** button.



3. Users can edit he requisition from the **Draft Requisition/Final Review** page. Administrative details can be edited and/or changed. Once the requisition is open, it becomes an Active Cart. Users can add items to the cart and assign or submit the cart after changes have been made. To preview the requisition workflow, see steps located under the **Assign Cart** button.



4. To review details of the purchase order, select the PO Preview at the top of the page.

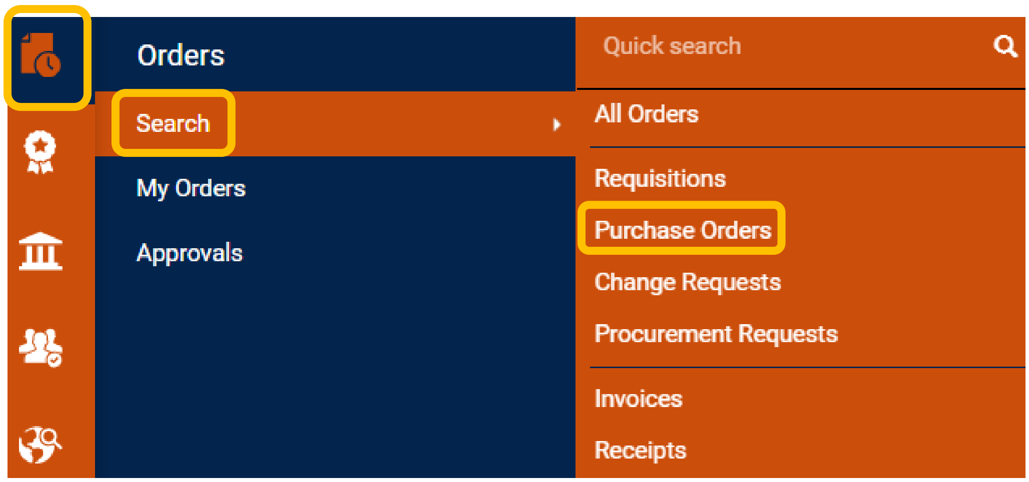


3.13 Viewing a Purchase Order

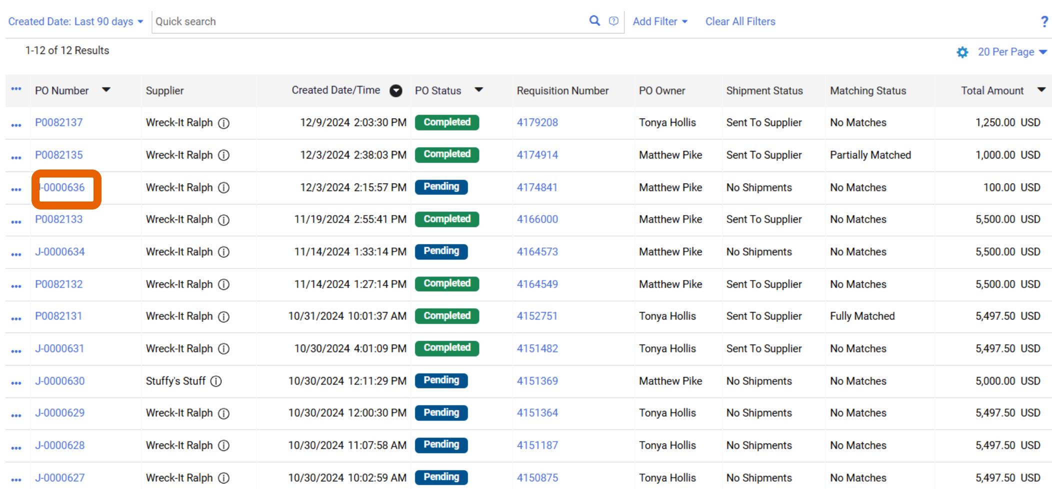
Target Audience: **Requisitioner**

Users can preview purchase orders submitted by users.

1. From the left-hand navigation menu, select the **Orders, Search, Purchase Orders** button.

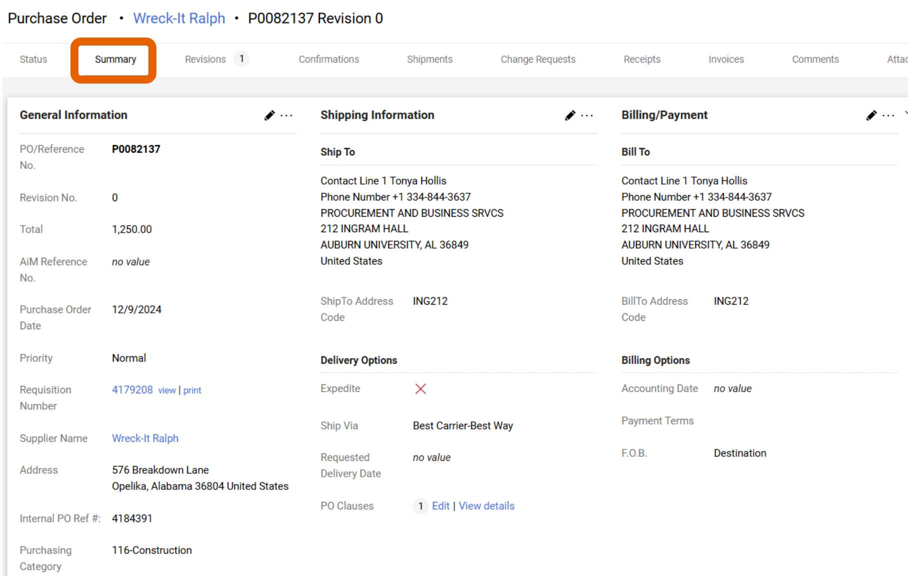


2. Select the purchase order for viewing.

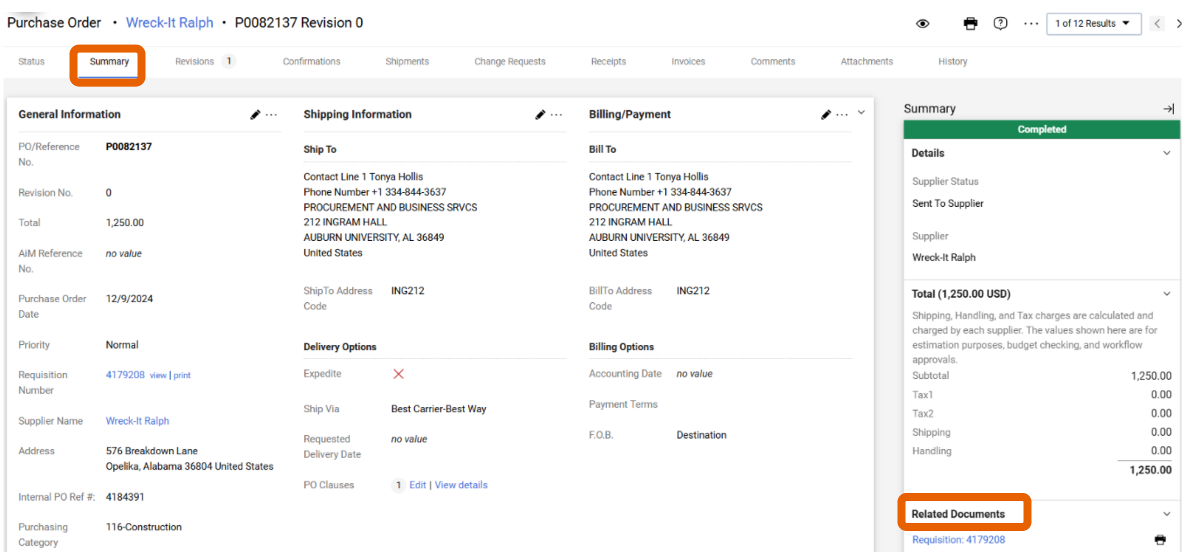


PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Matching Status	Total Amount
P0082137	Wreck-It Ralph	12/9/2024 2:03:30 PM	Completed	4179208	Tonya Hollis	Sent To Supplier	No Matches	1,250.00 USD
P0082135	Wreck-It Ralph	12/3/2024 2:38:03 PM	Completed	4174914	Matthew Pike	Sent To Supplier	Partially Matched	1,000.00 USD
J-0000636	Wreck-It Ralph	12/3/2024 2:15:57 PM	Pending	4174841	Matthew Pike	No Shipments	No Matches	100.00 USD
P0082133	Wreck-It Ralph	11/19/2024 2:55:41 PM	Completed	4166000	Matthew Pike	Sent To Supplier	No Matches	5,500.00 USD
J-0000634	Wreck-It Ralph	11/14/2024 1:33:14 PM	Pending	4164573	Matthew Pike	No Shipments	No Matches	5,500.00 USD
P0082132	Wreck-It Ralph	11/14/2024 1:27:14 PM	Completed	4164549	Matthew Pike	Sent To Supplier	No Matches	5,500.00 USD
P0082131	Wreck-It Ralph	10/31/2024 10:01:37 AM	Completed	4152751	Tonya Hollis	Sent To Supplier	Fully Matched	5,497.50 USD
J-0000631	Wreck-It Ralph	10/30/2024 4:01:09 PM	Completed	4151482	Tonya Hollis	Sent To Supplier	No Matches	5,497.50 USD
J-0000630	Stuffy's Stuff	10/30/2024 12:11:29 PM	Pending	4151369	Matthew Pike	No Shipments	No Matches	5,000.00 USD
J-0000629	Wreck-It Ralph	10/30/2024 12:00:30 PM	Pending	4151364	Tonya Hollis	No Shipments	No Matches	5,497.50 USD
J-0000628	Wreck-It Ralph	10/30/2024 11:07:58 AM	Pending	4151187	Tonya Hollis	No Shipments	No Matches	5,497.50 USD
J-0000627	Wreck-It Ralph	10/30/2024 10:02:59 AM	Pending	4150875	Tonya Hollis	No Shipments	No Matches	5,497.50 USD

3. A summary of the purchase order is available for users to review.



4. All related documents, including requisition, change requests, and invoices can be found in the summary section of the PO.



AUBURN UNIVERSITY
Procurement and Business Services

Auburn University
TigerBuy

Module 4: Status and Approval of Requisitions

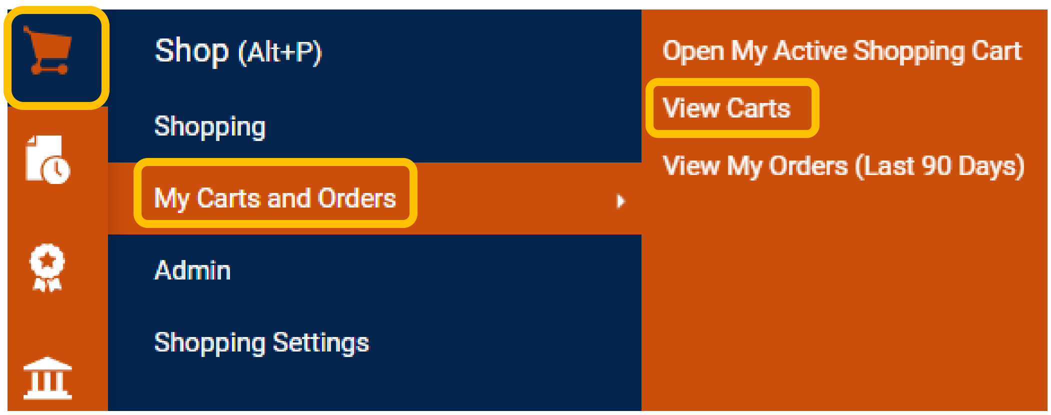
AUBURN UNIVERSITY
Procurement and Business Services

4.0 Assigning Substitute Requisitioners

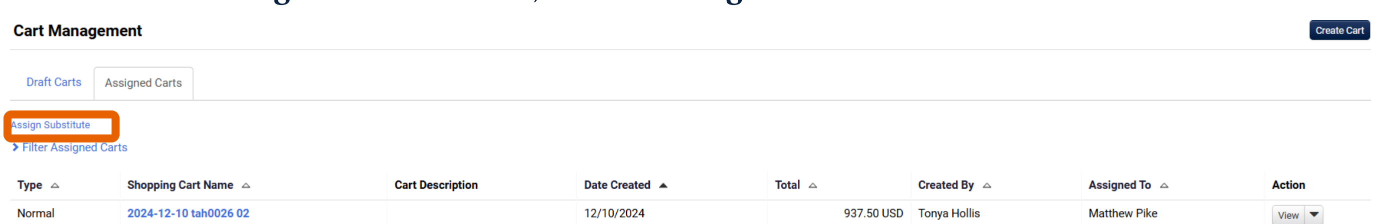
Target Audience: **Requisitioner**

When a cart is assigned to a requisitioner, the cart must be submitted in order for processing to begin. A requisitioner can assign a substitute requisitioner to assist with the cart submission. The substitute is able to review the cart assigned to the original assignee.

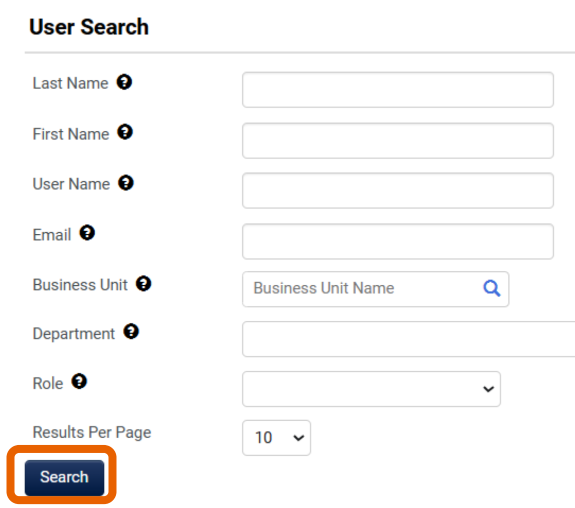
1. Once logged into TigerBuy, click the icon in the left-hand navigation bar, select **My Carts and Orders**, then **View Carts**.



2. From the **Assigned Carts** sub tab, click the **Assign Substitute** link.

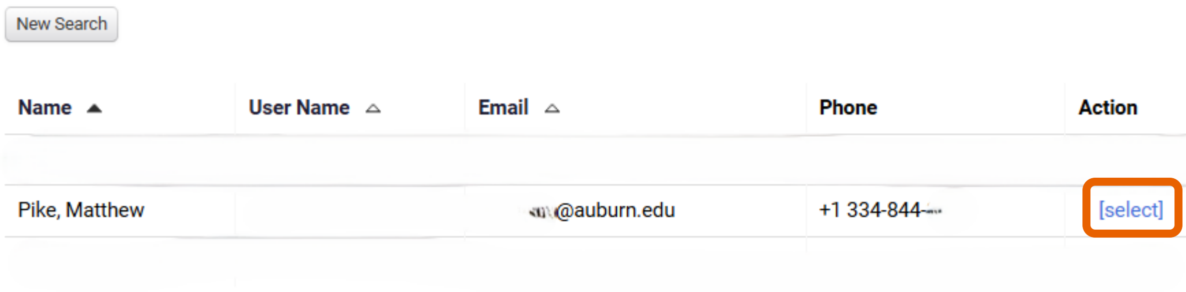


3. From the **User Search** popup, enter the criteria to find the user that you would like to assign as the substitute requisitioner and click **Search**.

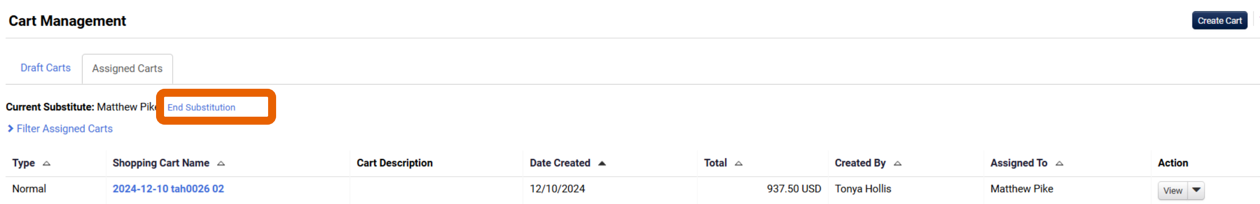


AUBURN UNIVERSITY
Procurement and Business Services

4. Select the appropriate user that should be the assigned requisitioner.



5. The requisitioner selected is now the substitute assignee. Click the **End Substitution** button on the draft carts to remove the substitution setting.

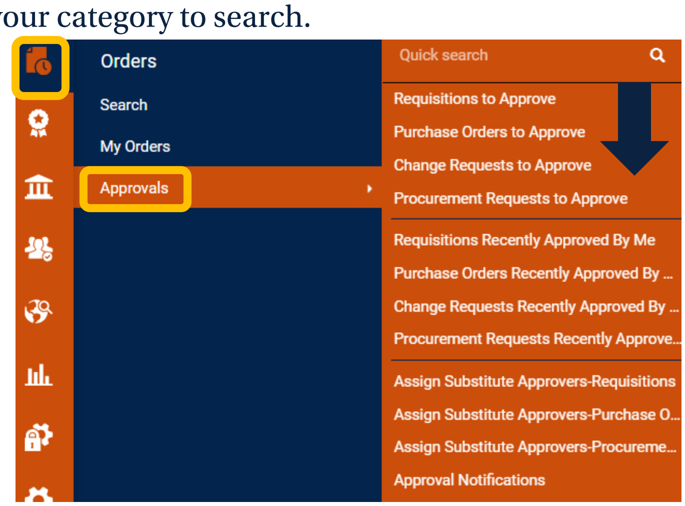


4.1 Navigating Approver Workflow Queues

Target Audience: **Requisitioner/Approver**

- **Filter Queues** offer several ways to view pending approvals including document type (e.g. Requisitions, invoices), date range, and document attributes (e.g. supplier, prepared by, status).
- **Sort Queues** allow the approval queue to be listed by the preferred order: submit date, requisition number, folder entry date, and dollar amount.
- **Group Results** allow the approver to toggle between a list view (show all requisitions in order) or a collapsed view (arranged by department org approval queues).

1. Navigate to the **Orders** icon in the left menu panel, navigate to **Approvals**, and choose your category to search.



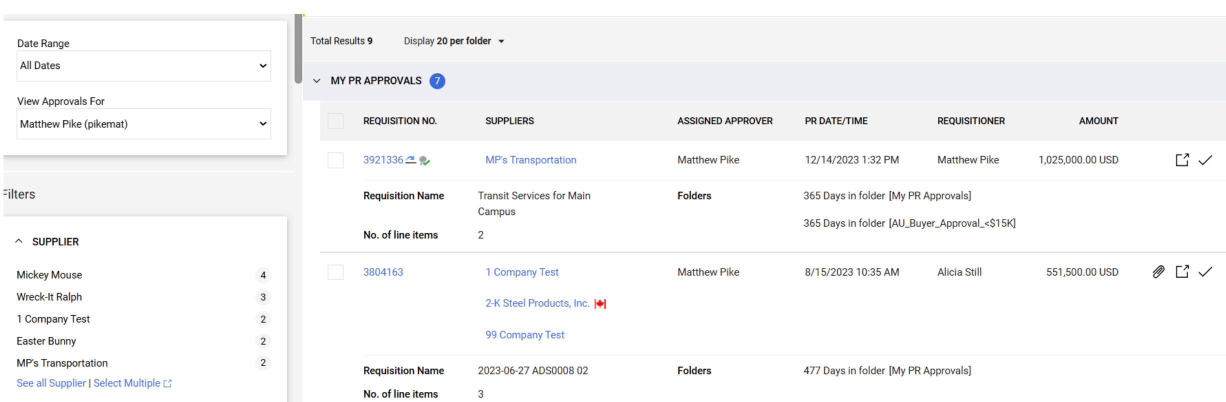
2. Important categories are noted below:
    - **Type**: Requisitions will show Procurement requisitions, Payment Requests, and Form-Based requests. Invoices will show Match Exceptions.
    - **Supplier**: The supplier providing the goods and services.
    - **Department**: Shows the department where the request originated.
    - **Prepared By**: The individual who prepared the requisition and submitted it for approval.
    - **State**: The current status of a document. Documents can be **assigned**, **unassigned**, or **placed on hold**. The **hold** feature is useful for separating documents that require follow-up from new requests. **Assigned documents** indicate an approver has taken ownership. **Unassigned documents** reside in a shared approval queue; any participating approver can access the document.

4.2 Reviewing, Assigning, And Approving Requisitions

Target Audience: **Requisitioner/Approver**

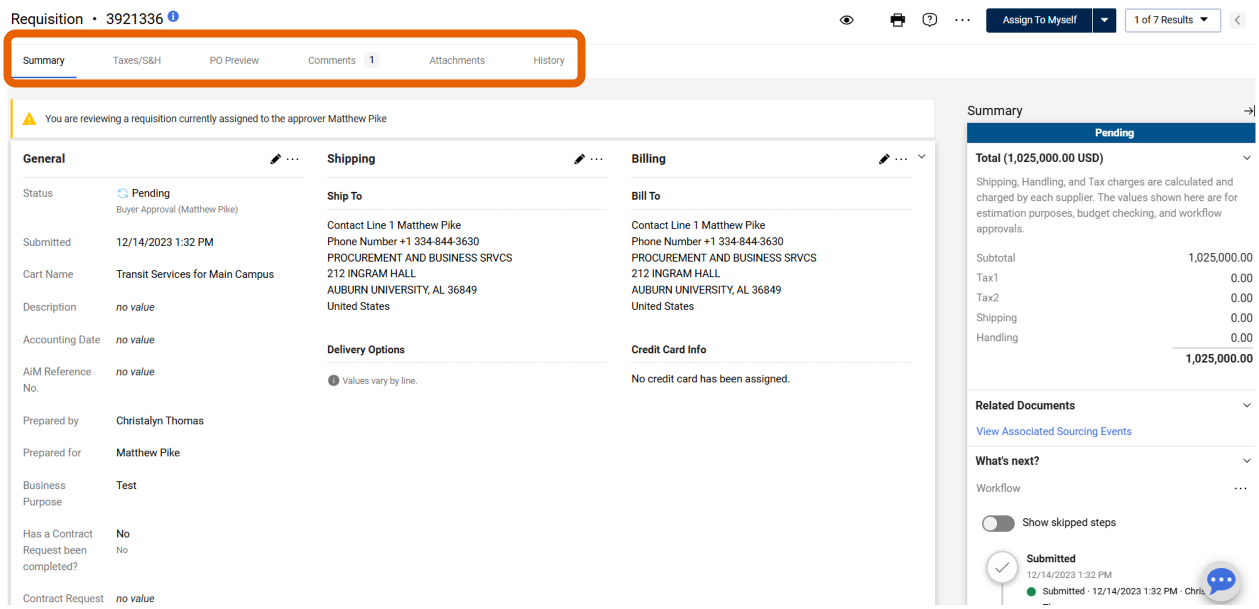
1. From the **Navigation Menu**, select the **Orders** icon, then select **Approvals,** and **Requisitions to Approve**.

2. All of your pending approvals will appear on the **Requisitions to Approve** page.

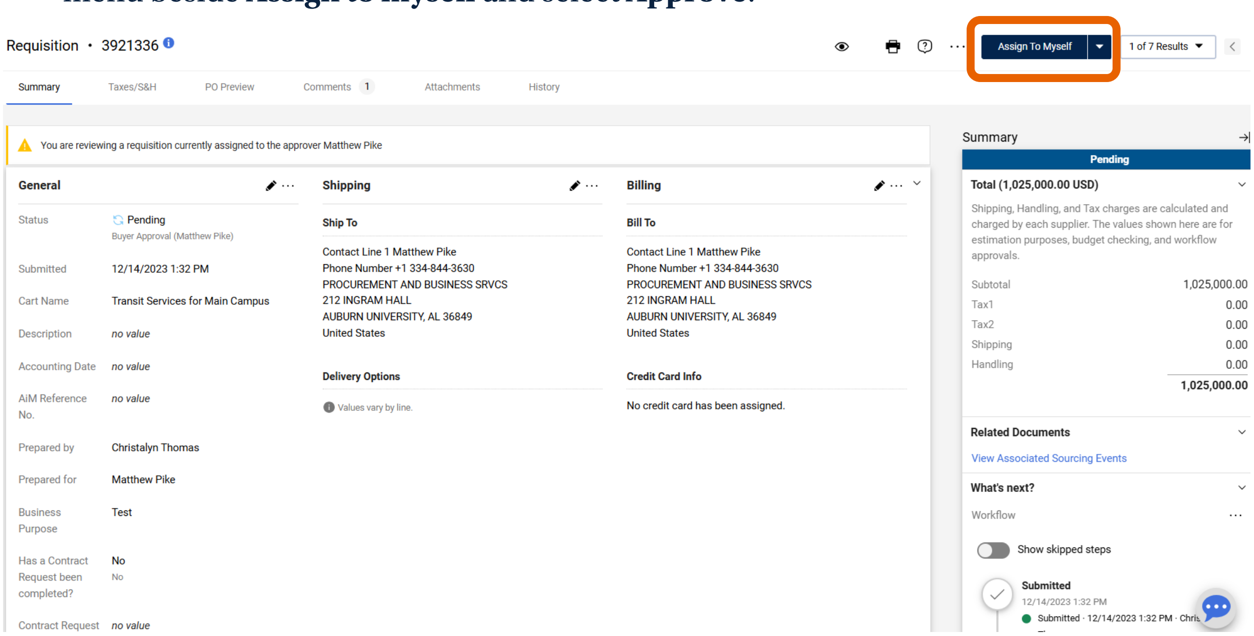


AUBURN UNIVERSITY
Procurement and Business Services

3. To open a requisition, **select the requisition number**. Before assigning or completing a requisition, you should review all components of the requisition including **Summary, PO Preview, Comments, Attachments**, and **History**. Those components are accessible via the menu bar highlighted at the top of the requisition.



4. Once you have reviewed the requisition, you can **Approve**. Click the dropdown menu beside **Assign to myself** and select **Approve**.

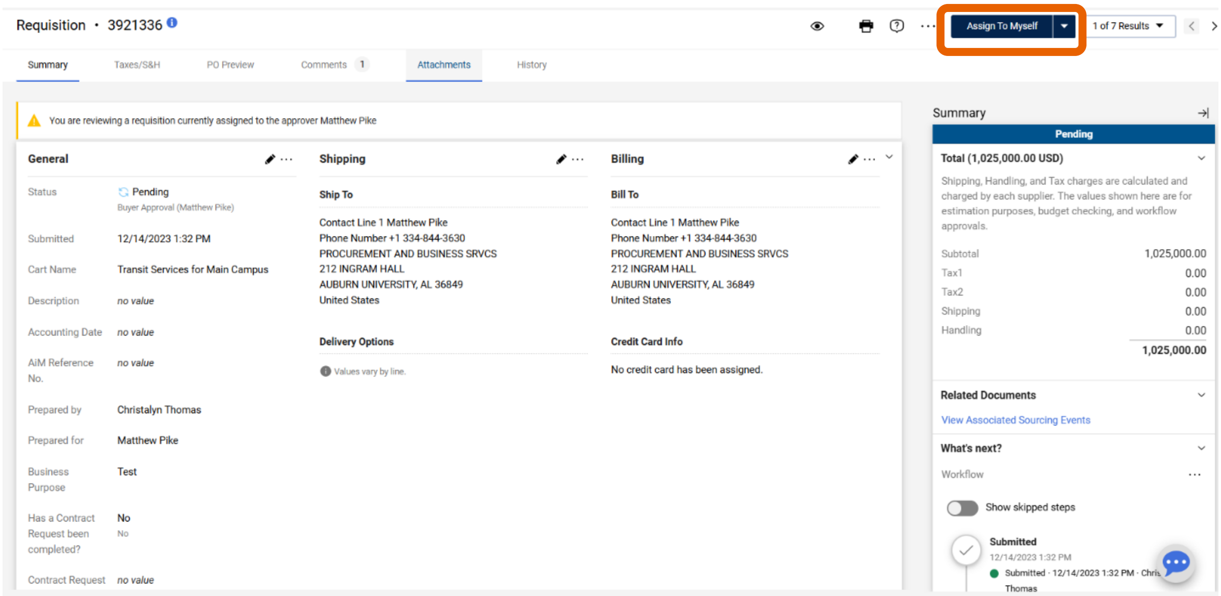


You can also click **Approve & Next. This will approve the current requisition and open the next one for review.

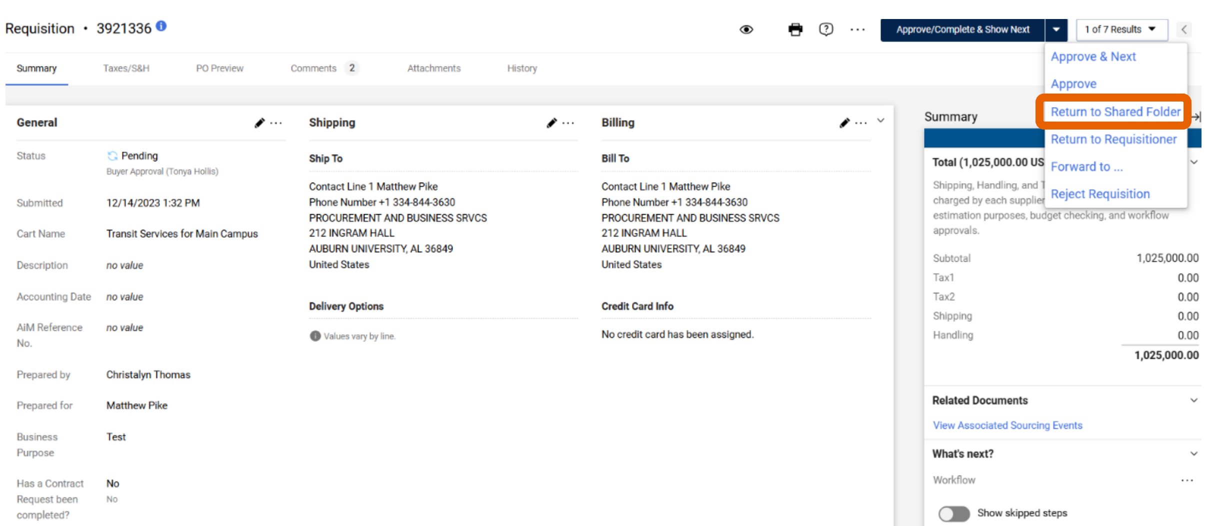
4.3 Returning Requisitions to Shared Approver Folders

Target Audience: **Requisitioner/Approver**

1. After opening the requisition, select the **Assign to myself** button in the top right corner. This assigns the requisition to you, and you will be able to choose what happens to the requisition next.



2. Select **Return to Shared Folders** option from the dropdown menu in the top right corner.



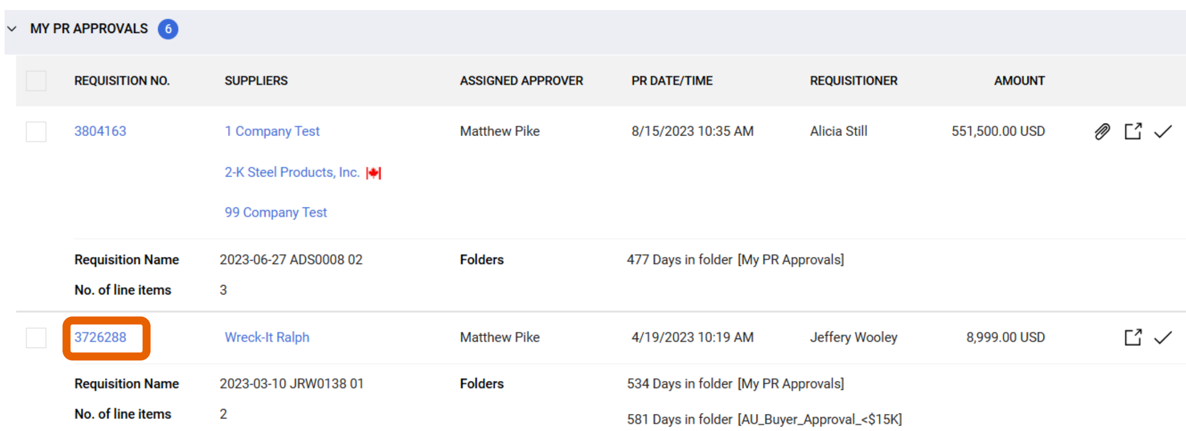
4.4 Sending Comments to the Requisitioner without Returning the Requisition

Target Audience: **Requisitioner/Approver**

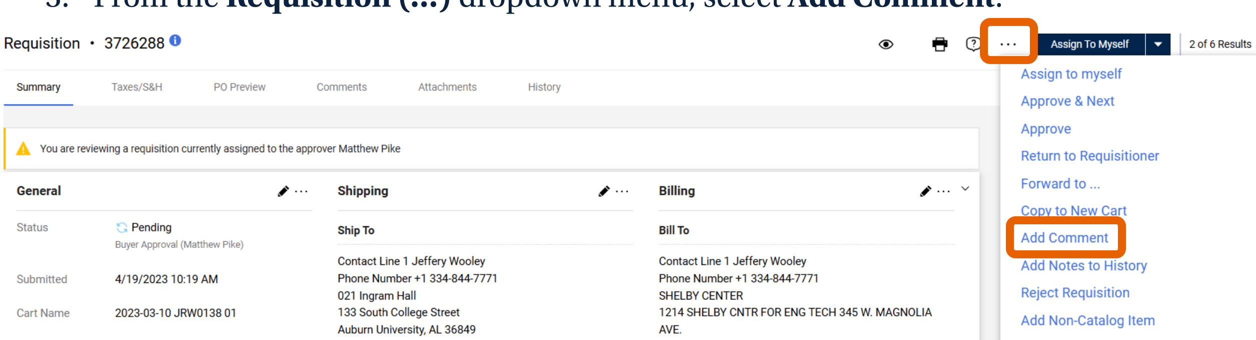
Requisitioners and approvers have the ability to add comments to the requisition. In addition, a comment may be sent to other TigerBuy users. Notifications of a comment will be transmitted via email to designated recipients.

1. From the **Navigation Menu**, select the **Orders** icon, then select **Approvals**, and **Requisitions to Approve**.

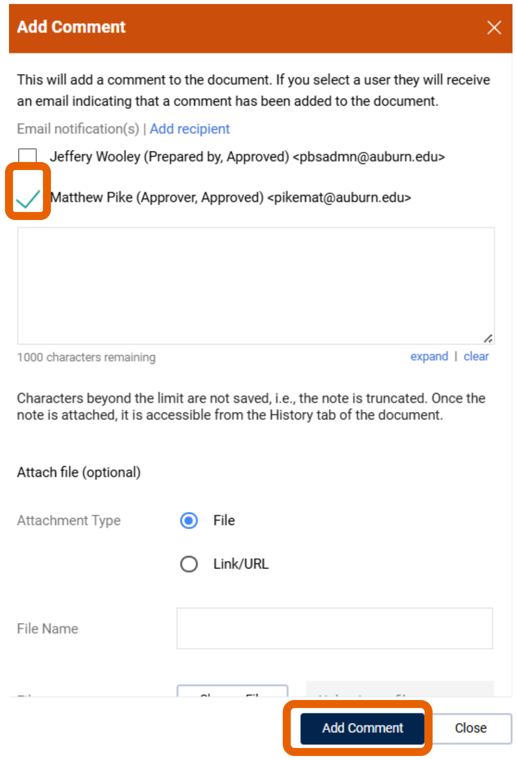
2. Select the appropriate requisition number that should have comments added to the requisitioner.



3. From the **Requisition (...)** dropdown menu, select **Add Comment**.



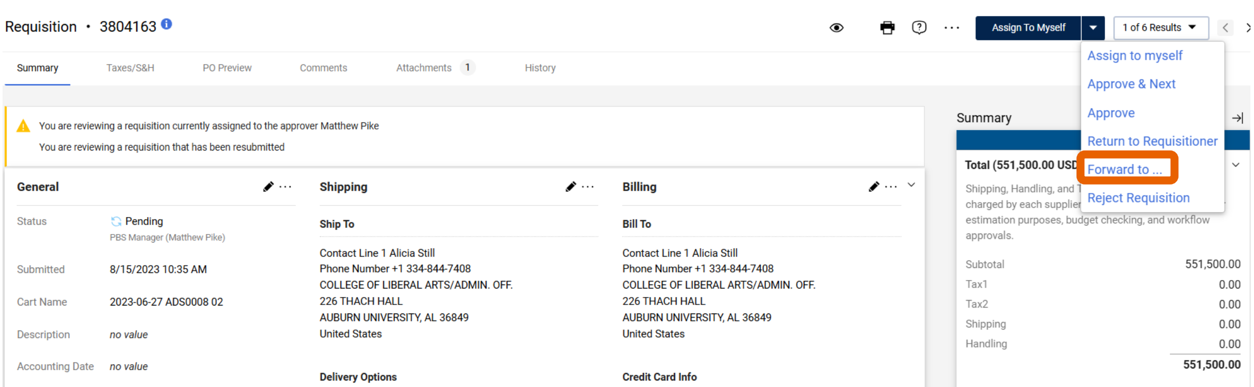
4. Add the comment that should be sent to the requester. The requester will receive a notification and an email regarding the requisition.



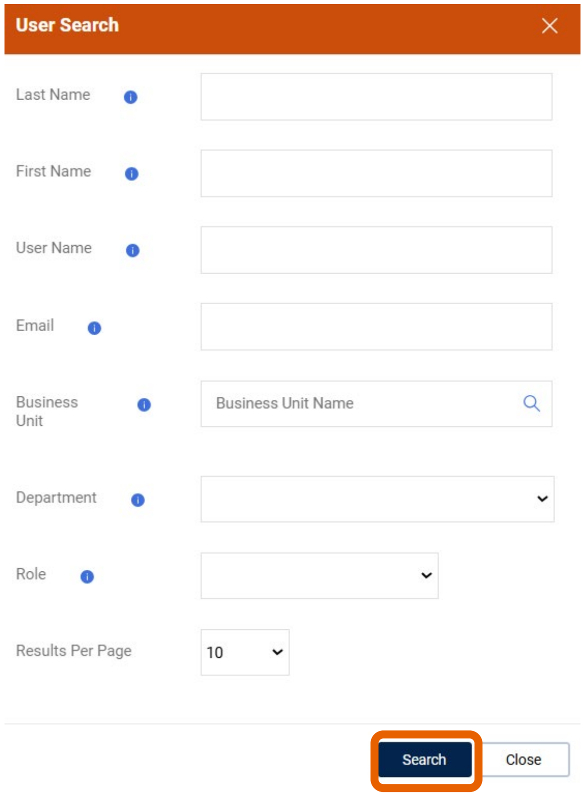
4.5 Forwarding a Requisition to Another Approver

Target Audience: **Approver**

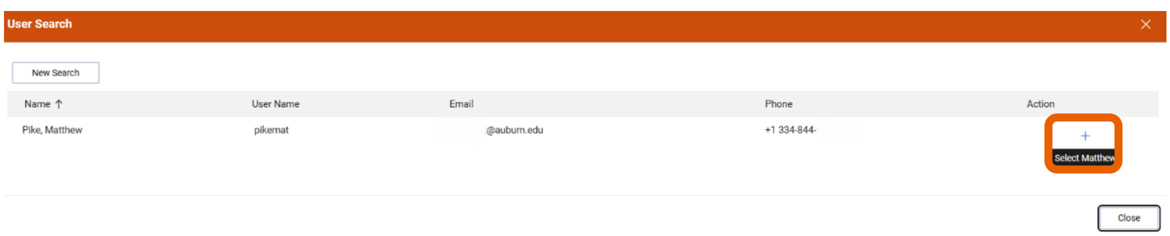
1. From the dropdown menu on the **Requisitions to Approve** page, select **Forward to…**



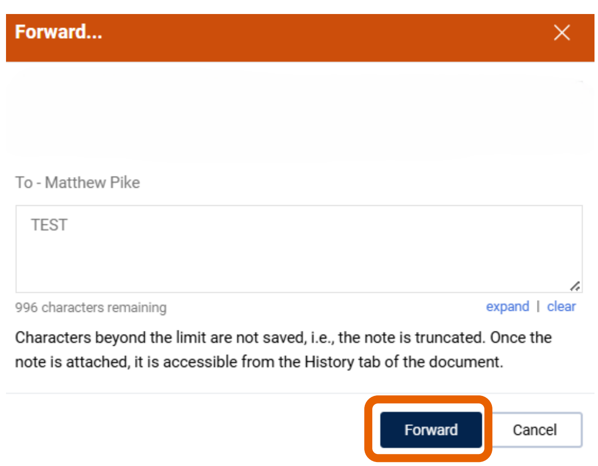
2. A **User Search** popup window will appear. Enter the name of the desired user and click **Search**.



3. Choose the appropriate user and click the **+ sign.**



4. If desired, enter a message for the approver that will receive this purchase requisition and click **Forward**.



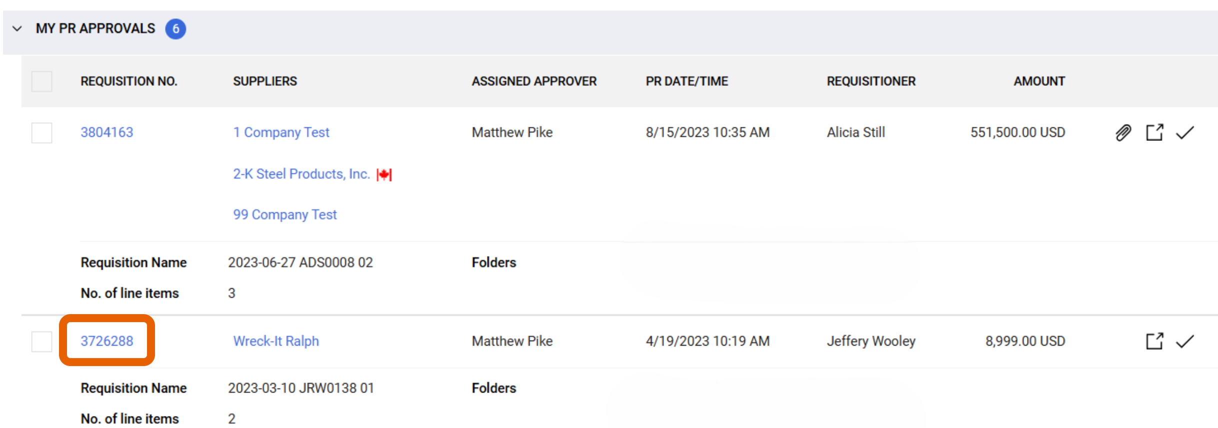
4.6 Rejecting Requisitions

Target Audience: **Approver**

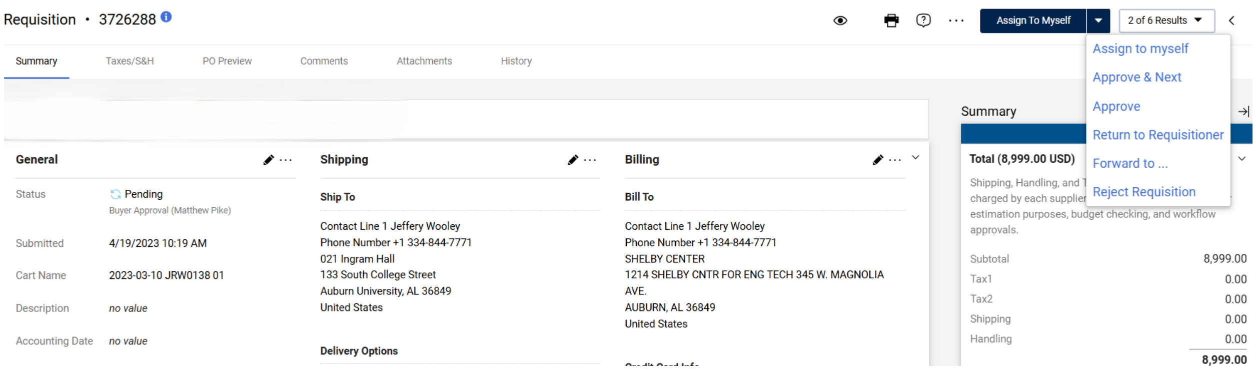
To reject a requisition or order, approvers have the ability to reject all lines of a requisition in one single action rather than line by line.

1. From the Navigation Menu, select the **Orders** icon, then select **Approvals**. Select **Requisitions to Approve** and select the appropriate requisition number to be rejected.

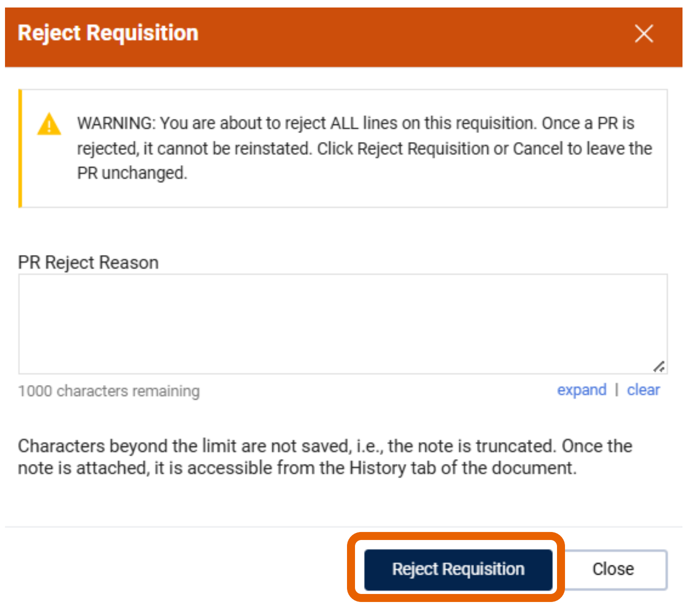
2. Select the appropriate requisition number to be returned.



3. Select the **Assign to Myself** dropdown menu and select **Reject Requisition**.



4. Before returning the requisition, include a reason for rejection.

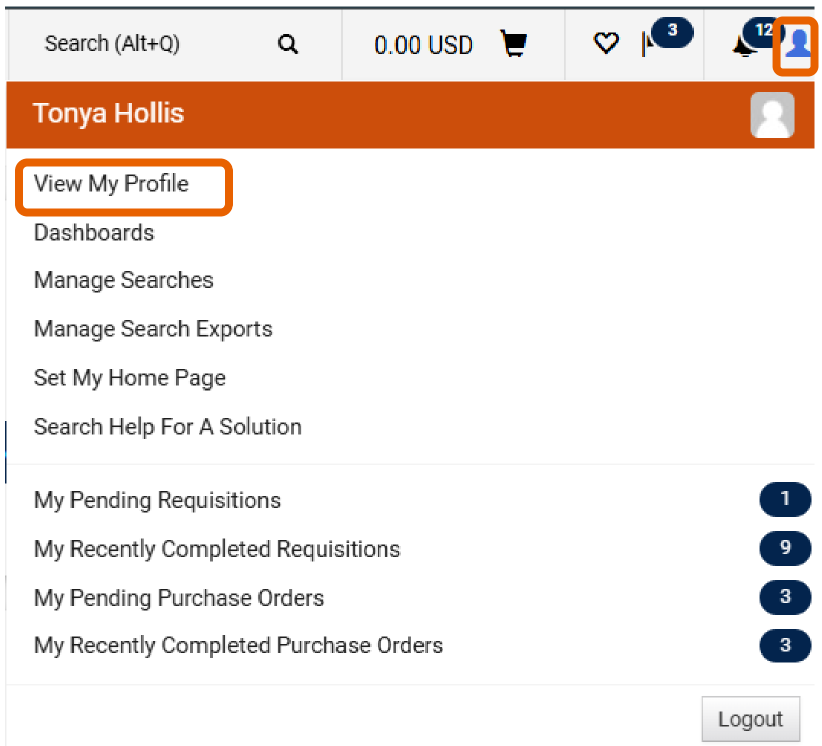


PLEASE NOTE: REJECTING a requisition means that the requisition cannot be edited afterwards. A rejected requisition will need to be re-entered.

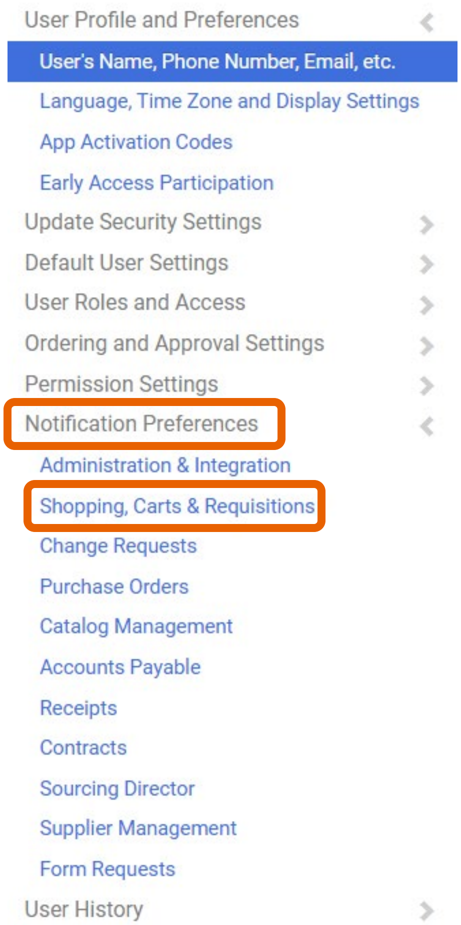
4.7 Removing/Editing Notifications

When actions are performed in TigerBuy, emails can be generated to notify users of these actions. It is recommended that users check these email notification boxes to increase the level of individual notification. By clicking the question mark icon, a brief description will be displayed to assist users in making a decision.

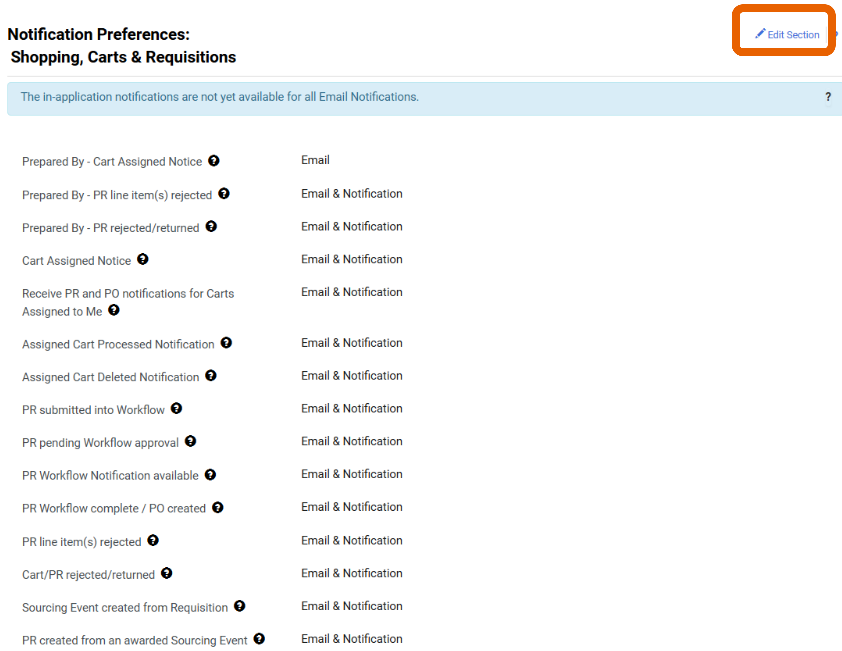
1. Navigate to the **View My Profile** link in the top right-hand corner of TigerBuy.



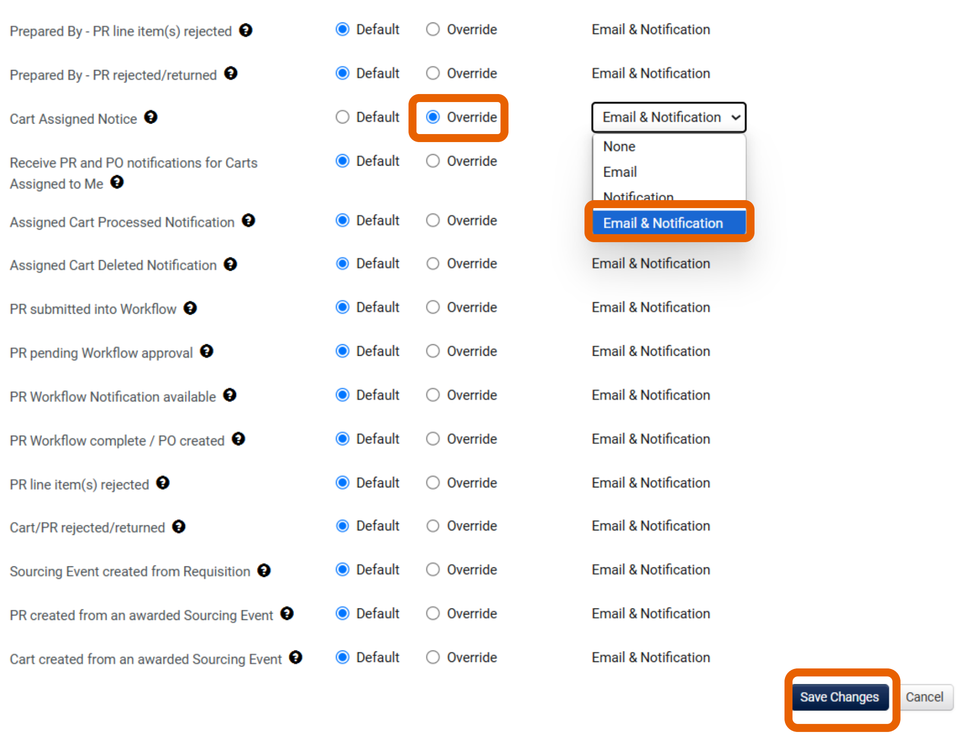
2. Select the **Notification Preferences** option and then select **Shopping, Carts, & Requisitions**.



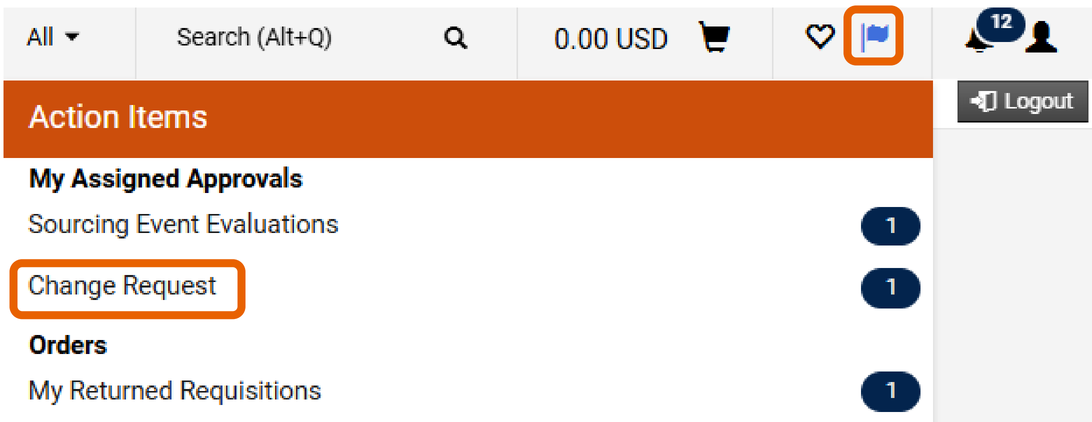
3. From the **Notification Preferences** screen, select **Edit Section** in the top right corner.



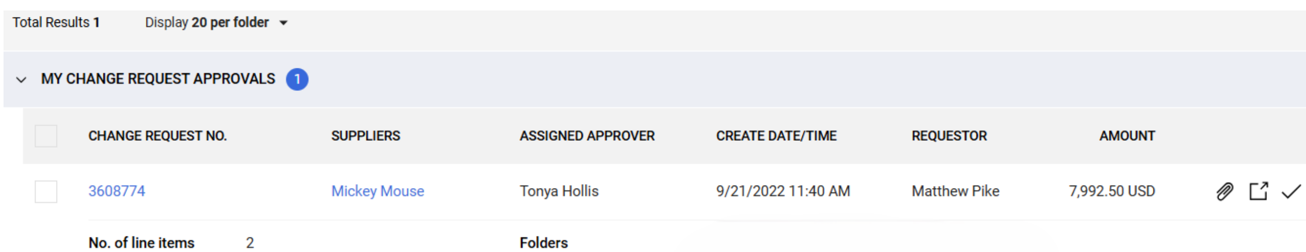
4. For the application, select **Override** and choose the **Notification Type** that is desired. Select **Save Changes**.



5. In the right-hand corner of the TigerBuy homepage, a notification showing your Action Items will appear. Select the flag for more information on the **Action Items**. (Example: Requisition to Approve, Change Request, etc.)



6. Notifications will remain in your **Action Items** until they have been completed. In this example, the one requisition to be approved must be approved or forwarded before being removed from the list of **Action Items**.

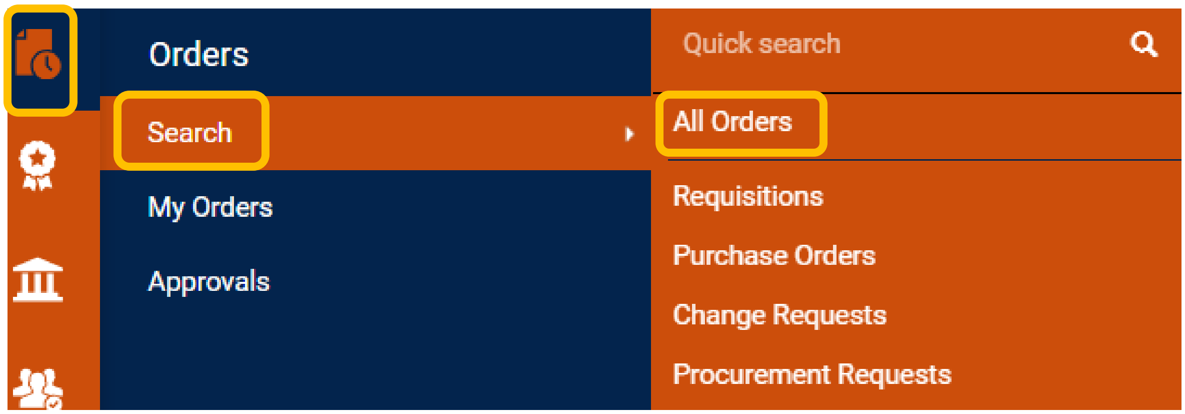


4.8 Reviewing and Approving Form Requisitions

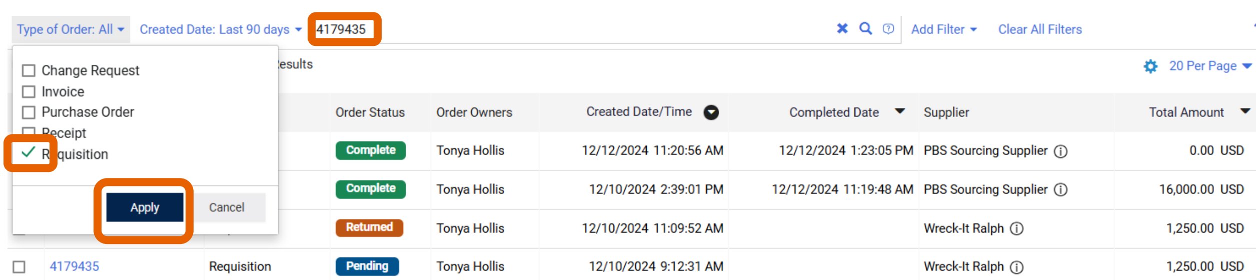
Target Audience: **Approver**

Non-catalog and special request items require reviewing and approving similar to typical catalog purchase requisitions, Approvers have the ability to review these form requisitions in the same manner of reviewing/approving catalog requisitions.

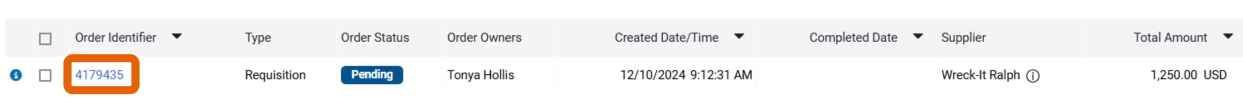
1. Navigate to the **Documents** icon in the **Navigation Menu** bar. Go to **Orders, Search, and All Orders.**



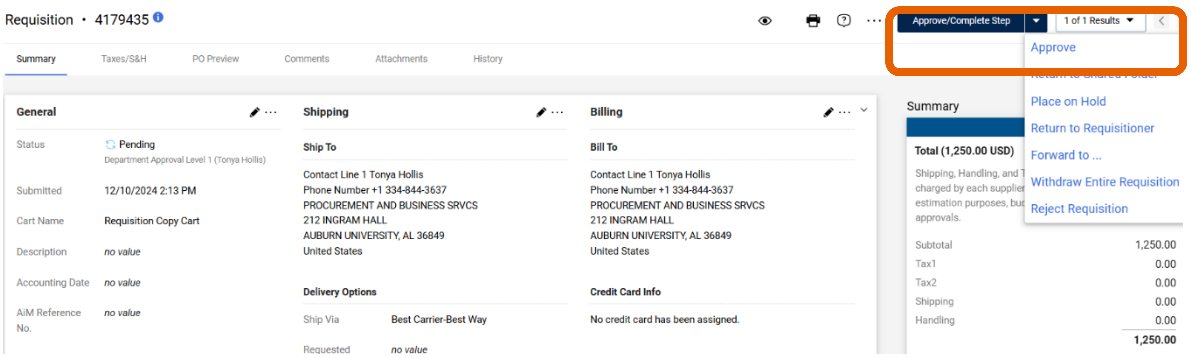
2. From the **Search Document** screen, choose the type of search, and enter any other search criteria.



3. Click the requisition number to open the requisition.



4. From inside the requisition, review all the information thoroughly and select the **Approve** button in the top right corner.

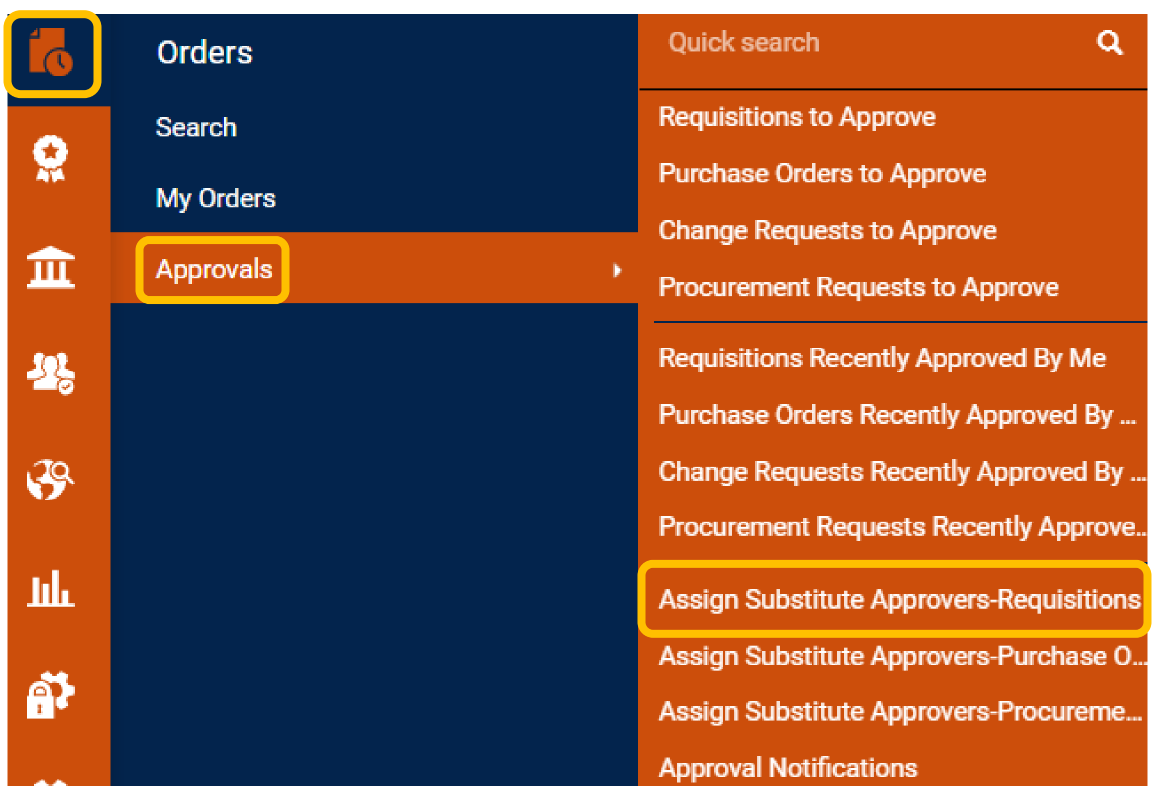


4.9 Assigning Substitute Approvers

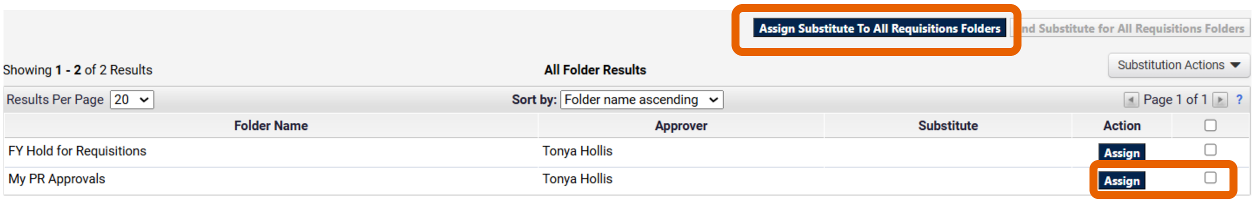
Target Audience: **Approver**

As an approver, there may be times that you will need to assign a substitute to approve PRs. This substitute will perform approver functions until it is no longer necessary. You may assign anyone as a substitute, but that individual will also need to be an approver.

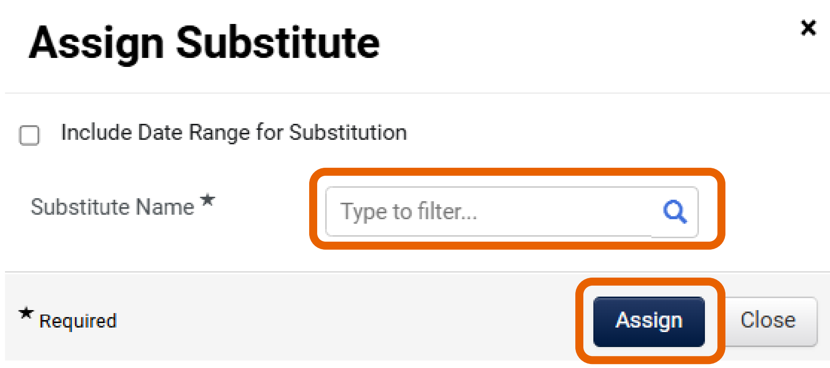
1. From the **Navigation Menu**, select the **Orders** icon and then select **Approvals**. Select **Assign Substitute Approvers**.



2. The **Managing Requisition** page will show all **Requisition Folders**. From this page, select the check box of the **Requisition Folder** that you would like to **Assign a Substitute** to then click **Assign**.



3. Type the name of the Substitute Approver in the text box and select **Assign**.



Auburn University TigerBuy

Module 5: Sourcing Events (Bids & RFPs)

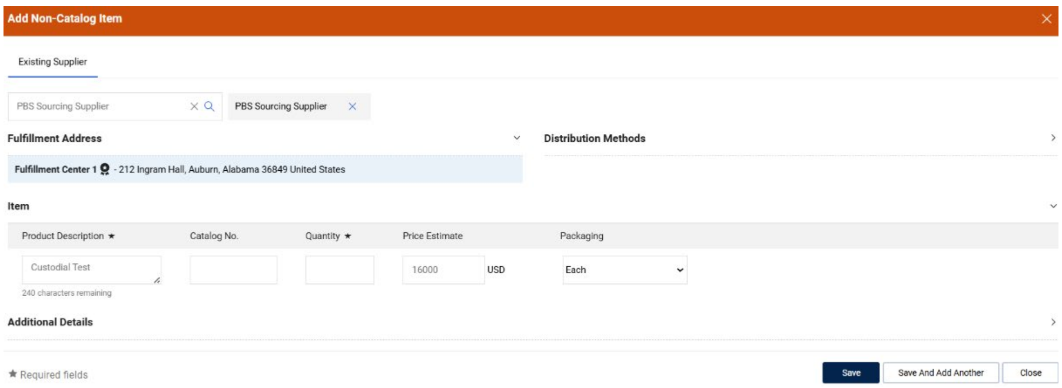
AUBURN UNIVERSITY
Procurement and Business Services

5.0 Sourcing Event

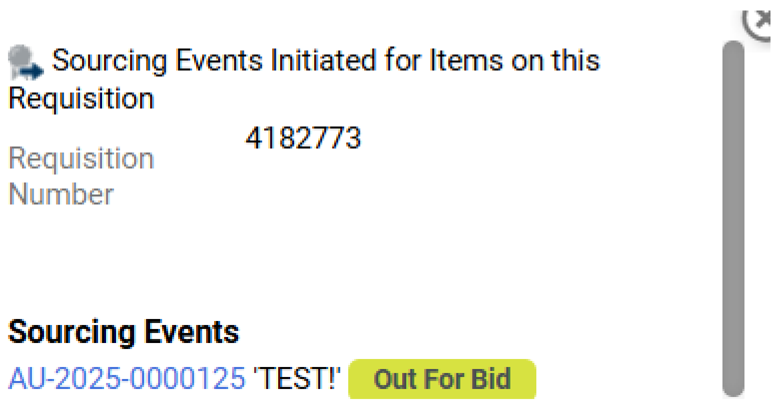
Target Audience: **Requisitioner**

Overview of Sourcing Events

For purchases of $75,000 or greater, which require a formal, sealed bid, a sourcing event will be required. When enter a requisition, **PBS Sourcing Supplier** must be entered as the supplier, along with an amount of $75,000 or greater. Entering this information will ensure the appropriate sourcing analyst is assigned to the requisition.



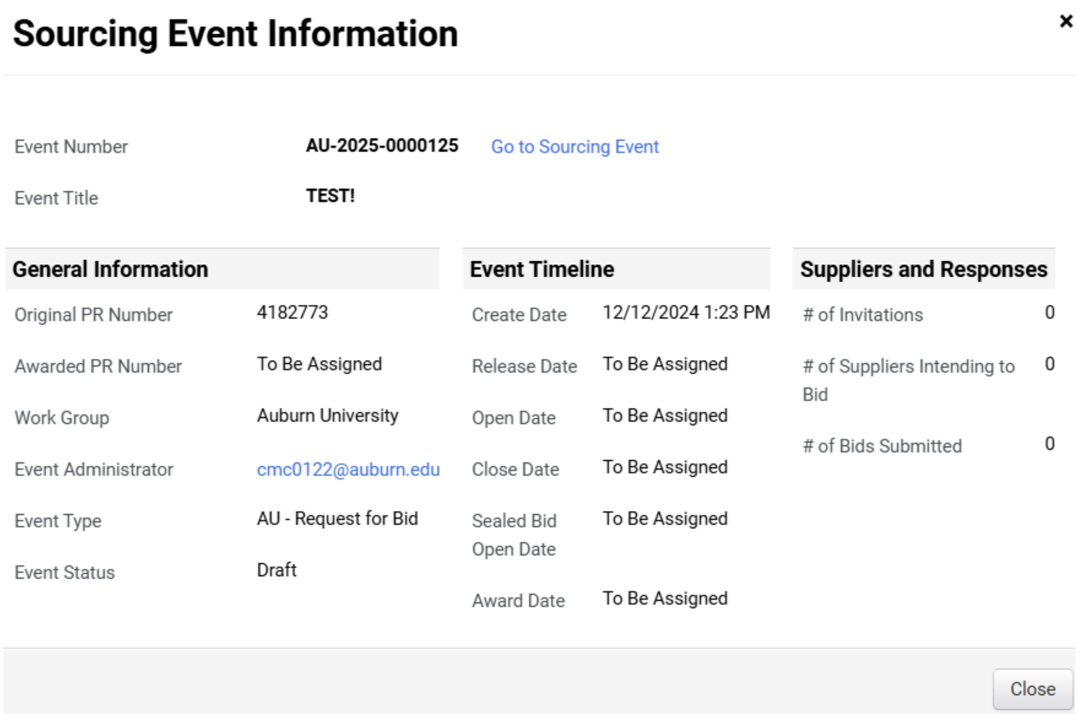
Once the requisition has been submitted, the necessary departmental approvals occurred, and it is assigned to a sourcing analyst, the requisition will be marked as “Sourcing Required” and an event will be initiated.



In the example above, the sourcing analyst has initiated the sourcing event from the requisition number listed. The event has been created and the status of the event is listed as “Out for Bid”. Clicking the event number will open a detail screen of the event (see next example).

5.1 Sourcing Event Information

In addition to seeing the status of the event from the requisition, users will also be able to access details of the event by clicking on the associated event number.



Information visible from this preview includes the following:

1. **Event Number**
2. **Event Title**
3. **Original Purchase Requisition Number**
4. **Event Administrator (Sourcing analyst)**
5. **Event Status**
6. **Event Dates (creation, release, open, and close)**
7. **# of Supplier Invited, # of Suppliers Intending to Bid, and # of Responses Submitted**

Departments are now able to monitor the status of any event in real-time with TigerBuy.

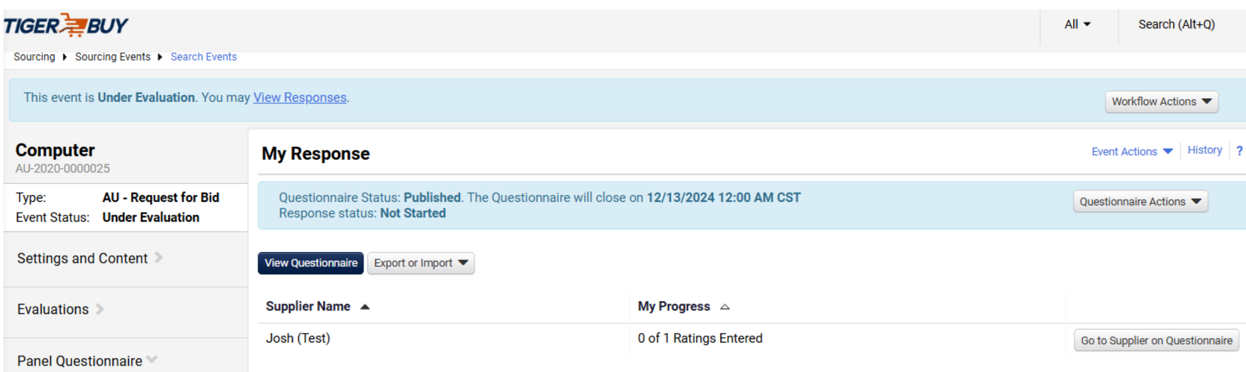
5.2 Sourcing Event Evaluation

Evaluation Overview

As with previous bids and RFPs in Self-Services, PBS requires that departments review and evaluate the responses received for any public solicitation. Sourcing events entered in TigerBuy will be evaluated in the same manner. A Request for Bid (RFB) is typically evaluated based on the lowest price received and meeting the specifications listed within the event. A Request for Proposal (RFP) is evaluated based on a specific set of evaluation criteria listed within the RFP document.

Completing a Panel Questionnaire

1. At the top right corner of TigerBuy, select the icon.
2. Select the Sourcing Event for which you have been listed as a stakeholder that references "**A Panel Questionnaire has been published**".
3. Under the **My Responses** tab on the left-hand side, select the blue **View Questionnaire** button.

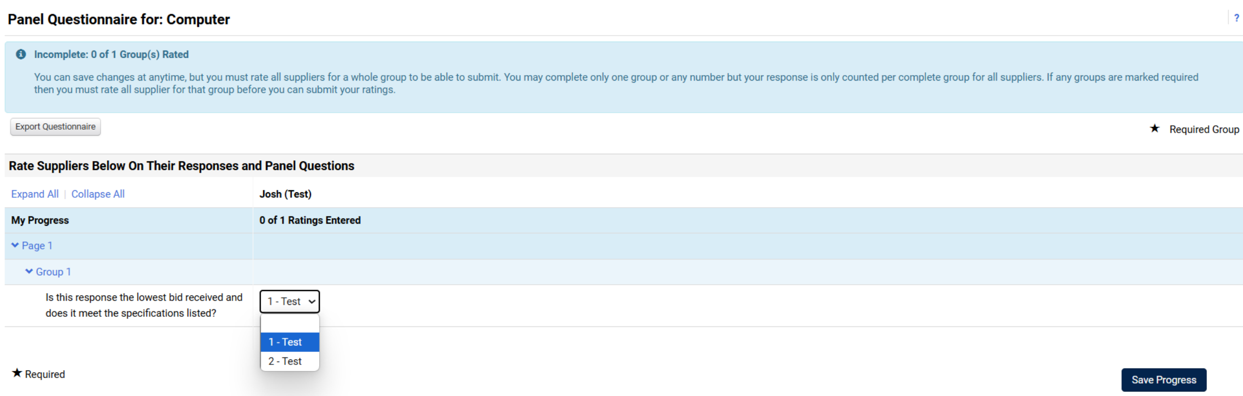


Panel questionnaires will be used as the formal evaluation of all bids and most RFPs. There will be times where more complex RFPs may not use the panel questionnaire and formal evaluation will take place outside of TigerBuy. These situations will be left to the discretion of PBS and the requesting department as evaluation criteria may be more extensive and require additional review.

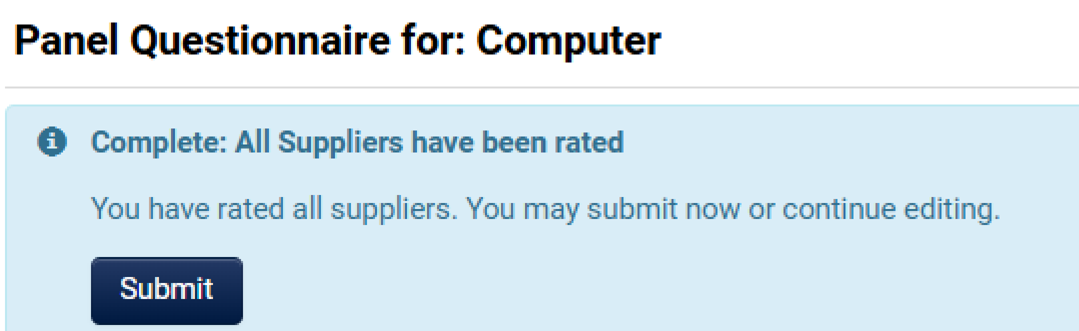
RFP Evaluation

In the example below, the panelist is being asked to rate the responses on a scale of 1 to 10, with 10 being the best score and 1 being the worst. The questions listed come directly from the RFP document.

For an RFP, the panelist is expected to provide a complete and thorough evaluation of all proposals received. In addition to the scoring, comments must be entered for all questions. This feature is used to provide details on the logic of scoring. Together, these will be used to justify the award to the PBS staff and potentially state examiners.

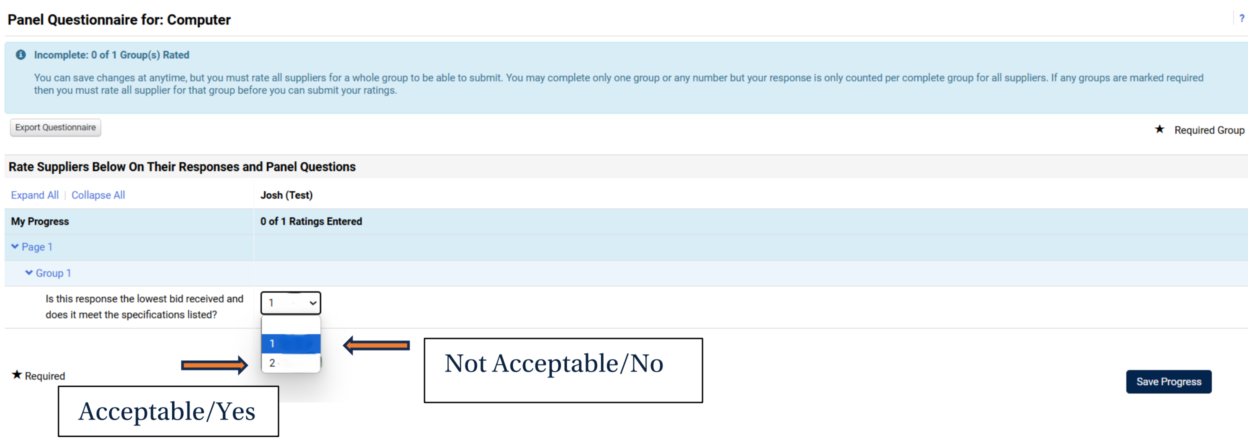


Once all questions have been answered, select the **Save Progress** button at the bottom right of the screen. Please note this does not submit the evaluation to the sourcing analyst. After saving, a **Submit** button will appear at the top left of the screen. Select **Submit** for the evaluation to be sent to the sourcing analyst.



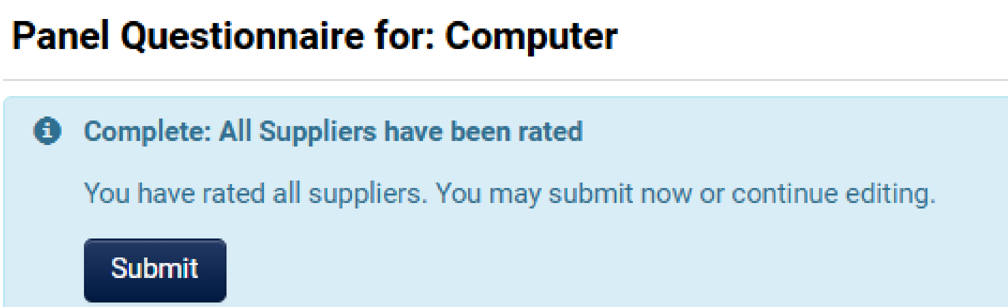
RFB Evaluation

For a Request for Bid (RFB), the evaluation is typically based on the lowest price that meets all specifications. The selection options on an RFB will be either **1 (Not Acceptable/No)** or **2 (Acceptable/Yes)**. In the example below, the response selected was the lowest price received meeting specifications.



For an RFB, the stakeholder is not required to make comments; however, in the case of an award scenario that doesn't involve the lowest price received, comments must be used to discuss how that response does not meet the specifications listed in the bid.

Once all questions have been answered, select the **Save Progress** button at the bottom right of the screen. Please note this does not submit the evaluation to the sourcing analyst. After saving, a **Submit** button will appear at the top left of the screen. Select **Submit** for the evaluation to be sent to the sourcing analyst.



Auburn University TigerBuy

Module 6: Receiving Orders/Products

AUBURN UNIVERSITY
Procurement and Business Services

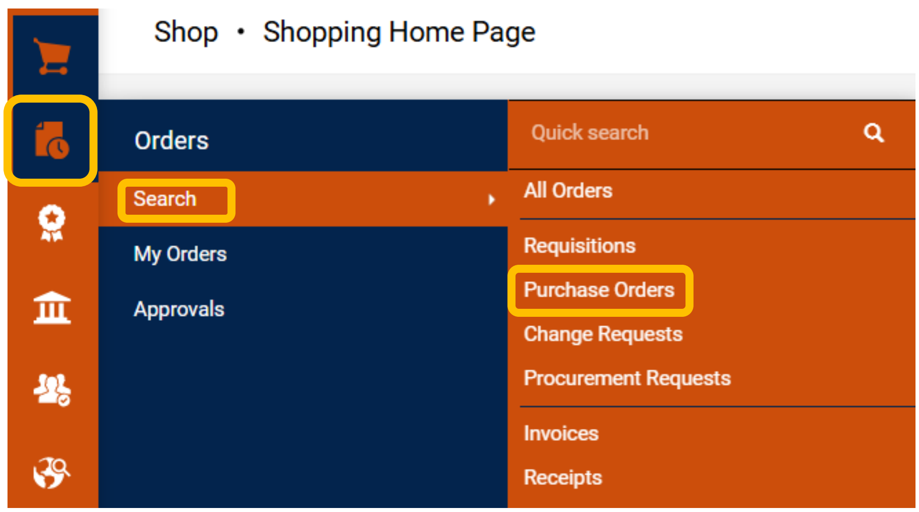
Certification of Receipt is now required to acknowledge receipt of your order. It reads "I certify that the goods/services listed below have been received in satisfactory condition. Any falsification of this receipt will result in administrative action, which may include disciplinary measures".

6.0 Creating Quantity Receipts

Target Audience: **Requisitioner**

Once the product or service is received, the receipt **must** be acknowledged in TigerBuy prior to payment. The end user must create a receipt for all PO orders. Quantity receipts are used to document a specific number of items that have been purchased and received.

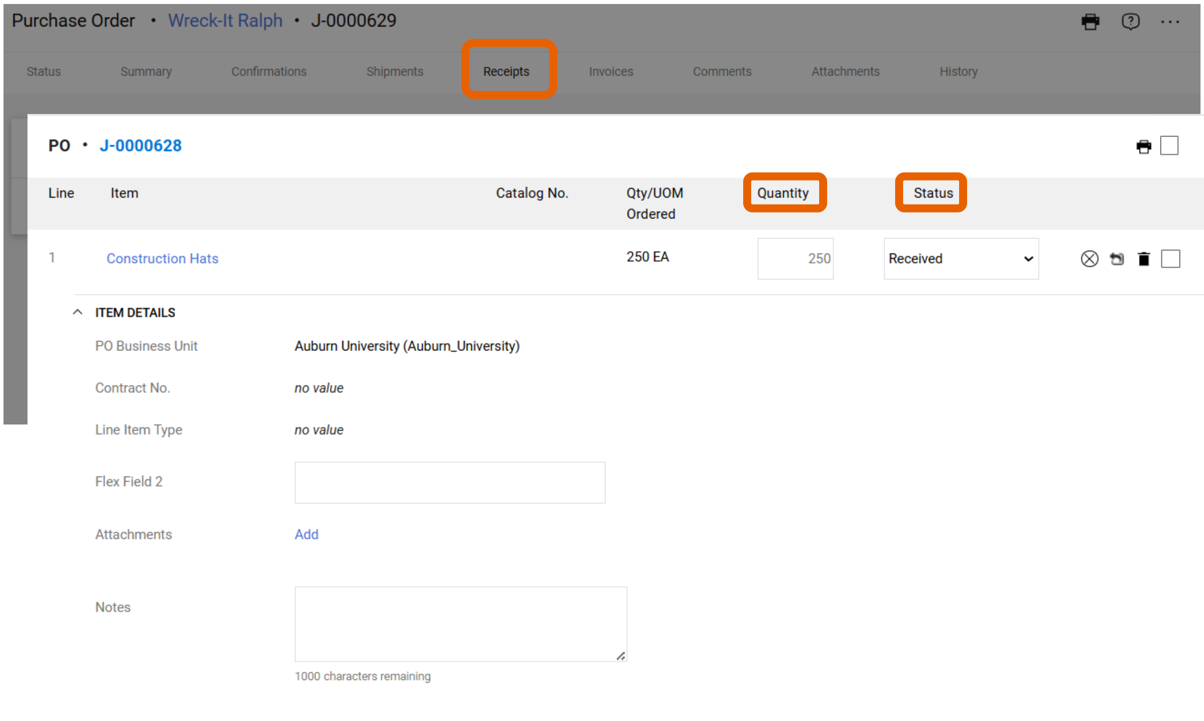
1. From the **Orders** icon in the **Navigation Menu**, go to **Orders, Search, and Purchase Orders.**



2. From the search results, select the purchase order number that requires a quantity receipt.

...	PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Matching Status	Total Amount
...	P0082137	Wreck-It Ralph ⓘ	12/9/2024 2:03:30 PM	Completed	4179208	Tonya Hollis	Sent To Supplier	No Matches	1,250.00 USD
...	P0082135	Wreck-It Ralph ⓘ	12/3/2024 2:38:03 PM	Completed	4174914	Matthew Pike	Sent To Supplier	Partially Matched	1,000.00 USD
...	J-0000636	Wreck-It Ralph ⓘ	12/3/2024 2:15:57 PM	Pending	4174841	Matthew Pike	No Shipments	No Matches	100.00 USD

3. Click the **Receipt** tab at the top of the PO, then click the **+** sign to add a receipt.

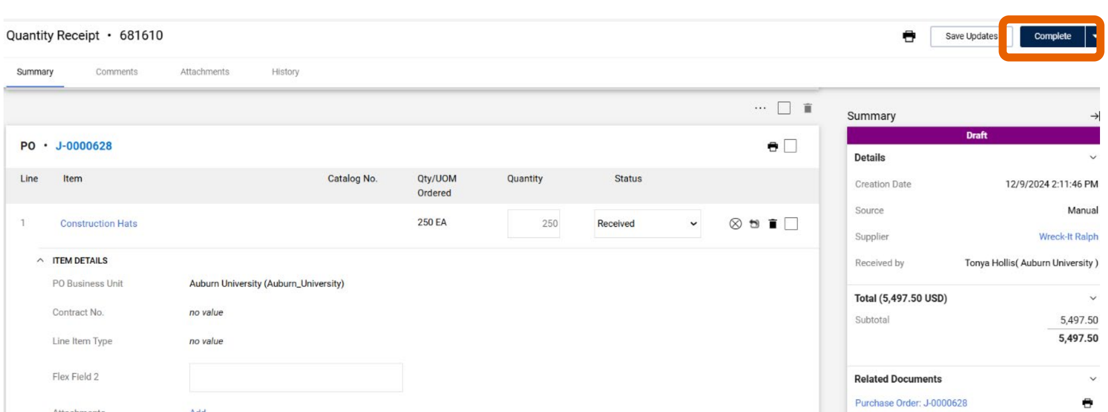


4. In the **Line Details** section, verify the **Quantity** and **Line Status** to reflect items that have been received. If you did not receive all the items you ordered, note the number of items that you did receive. This will reflect a partial order received.

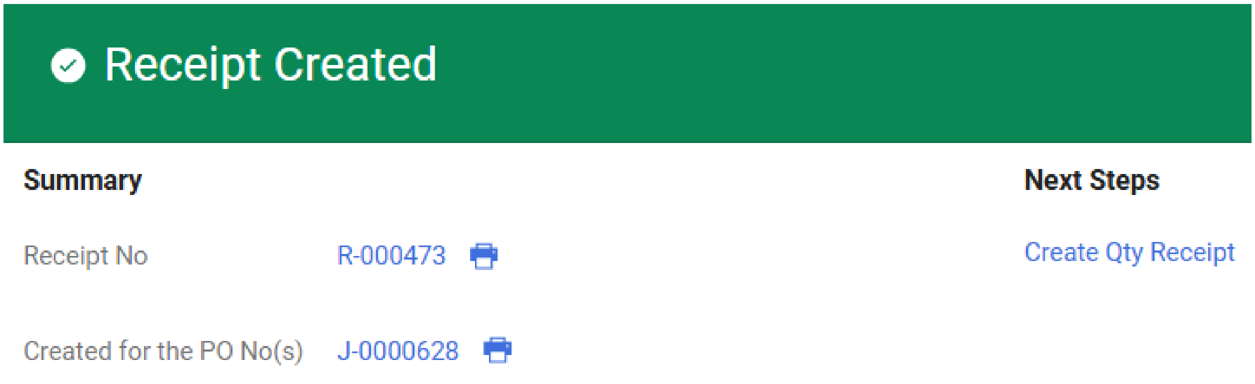
   The ordered quantity or cost will default in the **Quantity** field. If previous receipts have been entered, the open quantity or cost left on the purchase order will be reflected in the **Quantity** field. If you received more or less of the items on the line, change the quantity to the amount received. Do not over-receive unless you are approving payment for over-receipt. In that case, you may need a change request.

   If you have multiple lines on your purchase order and only want to receive some of the lines, remove the lines you do not want to receive by clicking the **Trash Can** icon.

5. In the top right-hand corner, select **Complete**.



6. A receipt page for the PO will appear. To go back to the main PO search page, select **Create Quantity Receipt**.

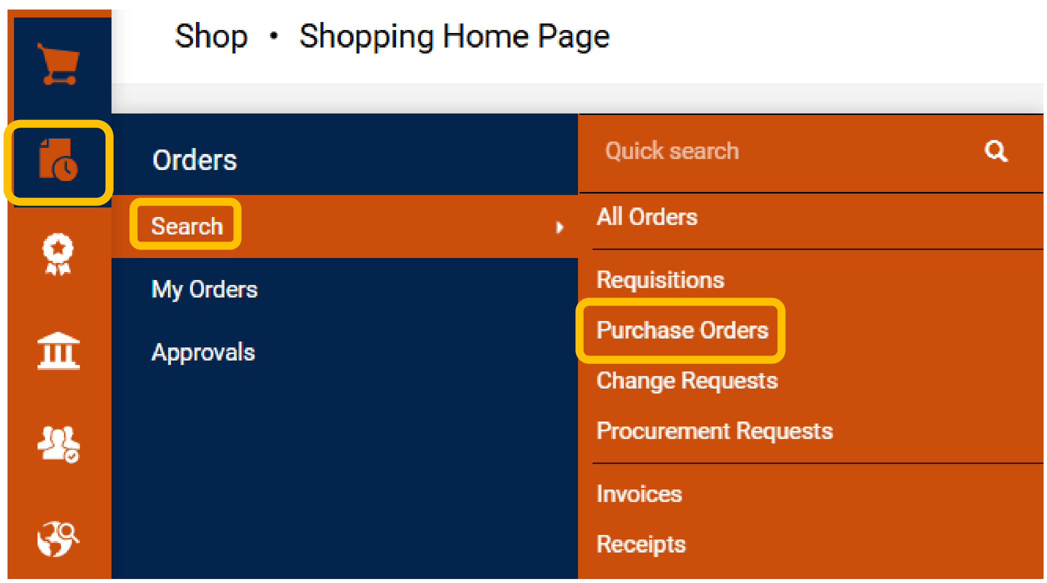


6.1 Creating a Quantity Receipt to Simultaneously Receive and Return an Item

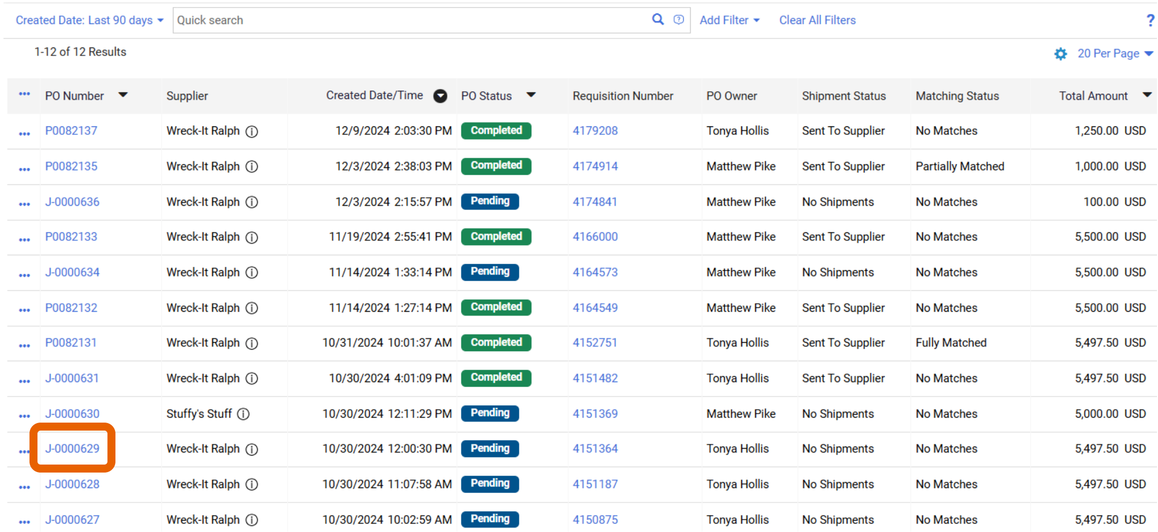
Target Audience: **Requisitioner**

If an item has been received and should be returned, users can receive an item and return it simultaneously.

1. From the **Orders** icon in the **Navigation Menu**, go to **Orders, Search, and Purchase Orders.**



2. From the search results, select the purchase order number that requires a canceled receipt.

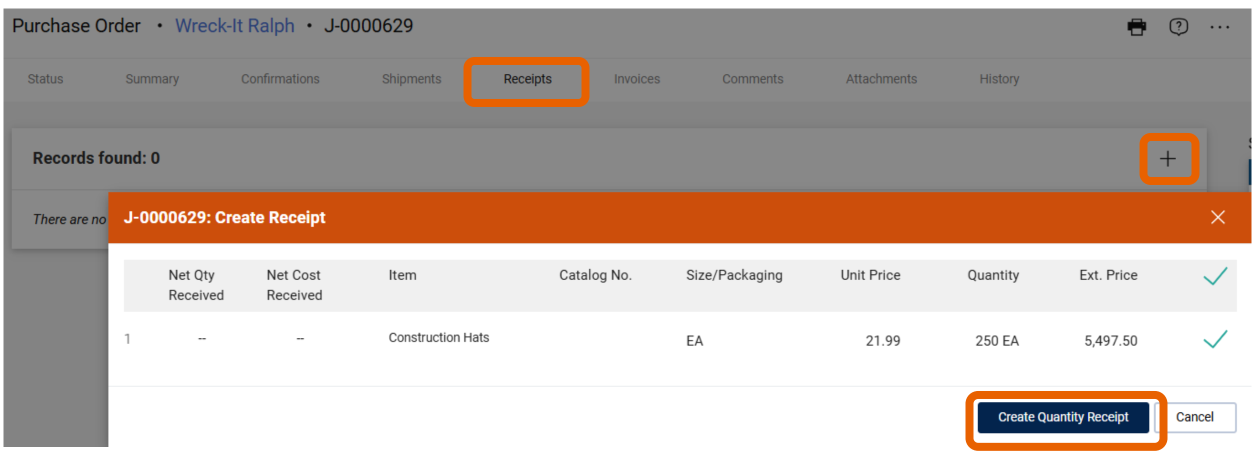


Created Date: Last 90 days | Quick search | Add Filter | Clear All Filters

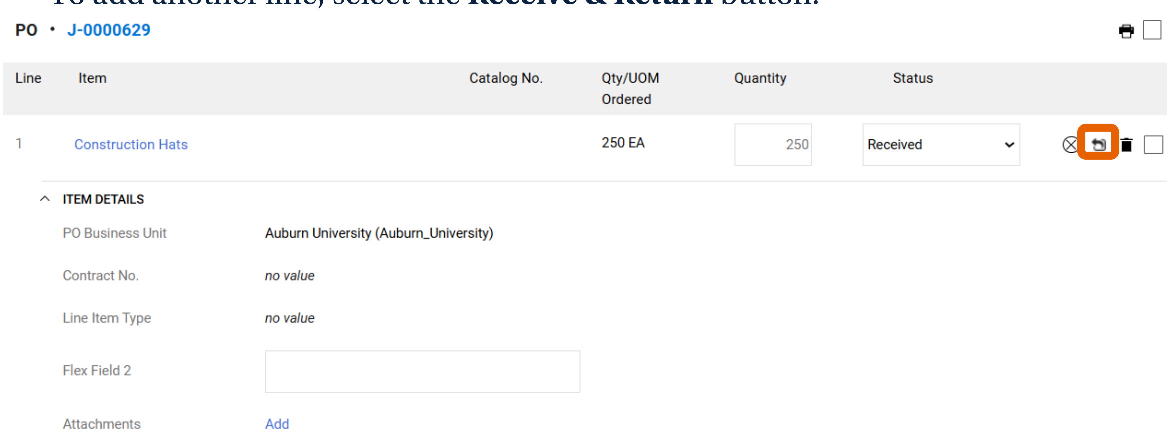
1-12 of 12 Results | 20 Per Page

PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Matching Status	Total Amount
P0082137	Wreck-It Ralph	12/9/2024 2:03:30 PM	Completed	4179208	Tonya Hollis	Sent To Supplier	No Matches	1,250.00 USD
P0082135	Wreck-It Ralph	12/3/2024 2:38:03 PM	Completed	4174914	Matthew Pike	Sent To Supplier	Partially Matched	1,000.00 USD
J-0000636	Wreck-It Ralph	12/3/2024 2:15:57 PM	Pending	4174841	Matthew Pike	No Shipments	No Matches	100.00 USD
P0082133	Wreck-It Ralph	11/19/2024 2:55:41 PM	Completed	4166000	Matthew Pike	Sent To Supplier	No Matches	5,500.00 USD
J-0000634	Wreck-It Ralph	11/14/2024 1:33:14 PM	Pending	4164573	Matthew Pike	No Shipments	No Matches	5,500.00 USD
P0082132	Wreck-It Ralph	11/14/2024 1:27:14 PM	Completed	4164549	Matthew Pike	Sent To Supplier	No Matches	5,500.00 USD
P0082131	Wreck-It Ralph	10/31/2024 10:01:37 AM	Completed	4152751	Tonya Hollis	Sent To Supplier	Fully Matched	5,497.50 USD
J-0000631	Wreck-It Ralph	10/30/2024 4:01:09 PM	Completed	4151482	Tonya Hollis	Sent To Supplier	No Matches	5,497.50 USD
J-0000630	Stuffy's Stuff	10/30/2024 12:11:29 PM	Pending	4151369	Matthew Pike	No Shipments	No Matches	5,000.00 USD
J-0000629	Wreck-It Ralph	10/30/2024 12:00:30 PM	Pending	4151364	Tonya Hollis	No Shipments	No Matches	5,497.50 USD
J-0000628	Wreck-It Ralph	10/30/2024 11:07:58 AM	Pending	4151187	Tonya Hollis	No Shipments	No Matches	5,497.50 USD
J-0000627	Wreck-It Ralph	10/30/2024 10:02:59 AM	Pending	4150875	Tonya Hollis	No Shipments	No Matches	5,497.50 USD

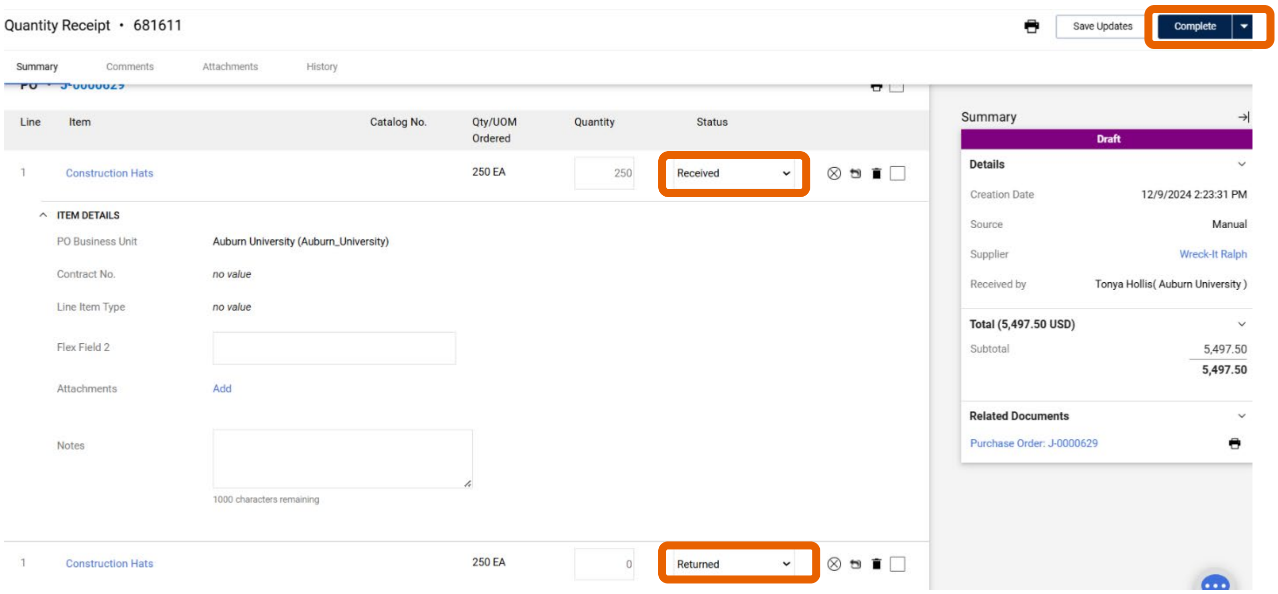
3. Click the **Receipt** tab at the top of the PO, then click the **+** sign to add a receipt.



4. In the **Line Details**, you will see two ice machines in this order reflected in one line. To add another line, select the **Receive & Return** button.



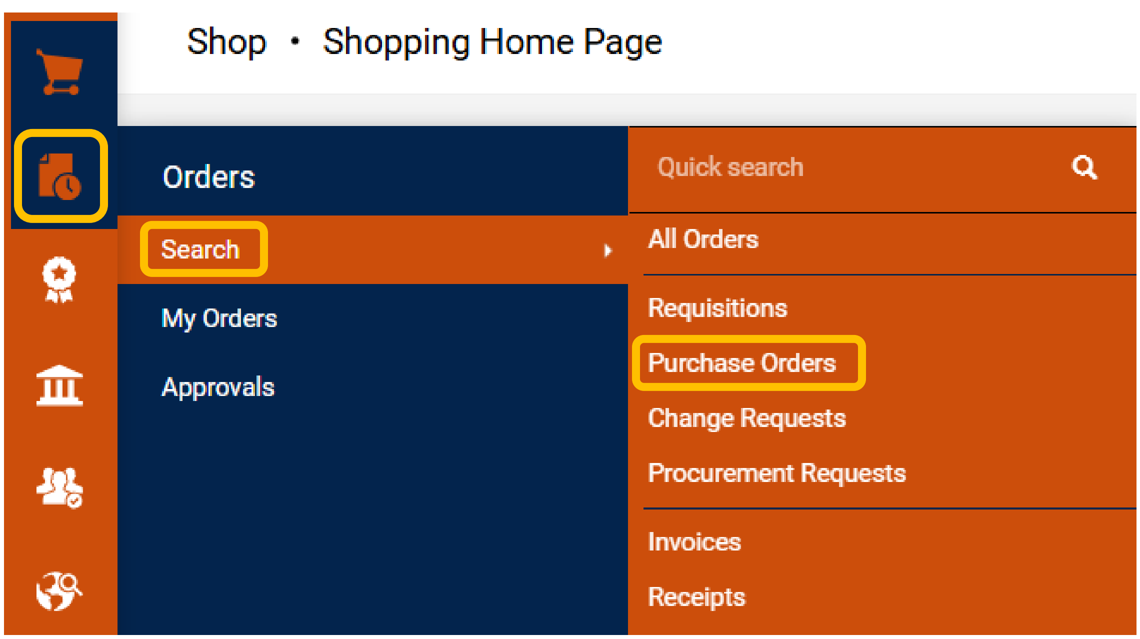
5. For the order, we will receive one of the ice machines and return the remaining machine. On the first line, change the **Quantity** to one and change the **Line Status** to **Received**. On the second line, change the **Quantity** to one and change the **Line Status** to **Returned**. Select **Complete**.



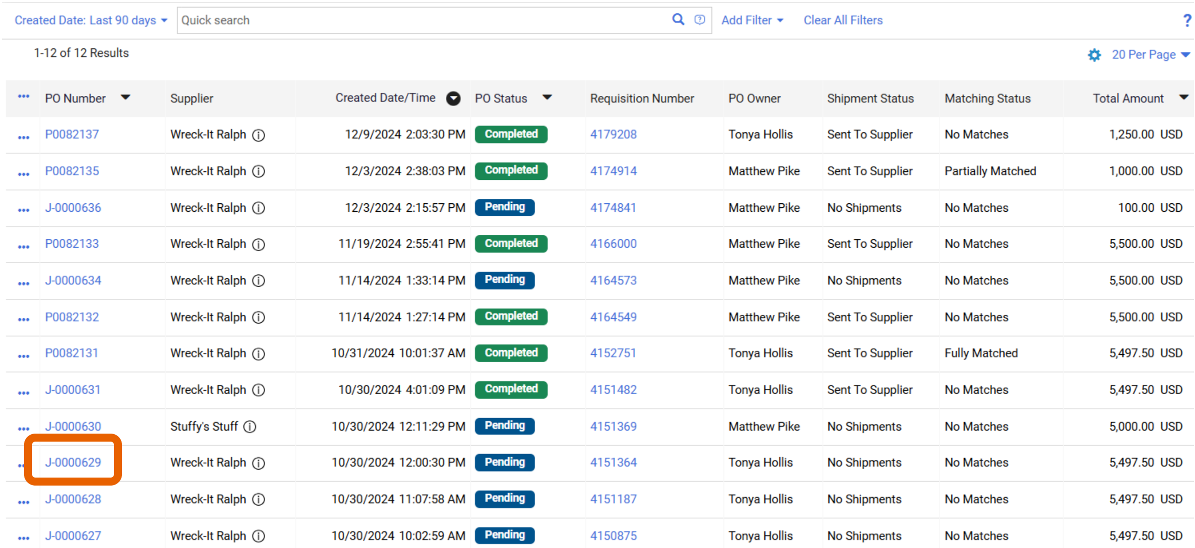
6.2 Creating Receipt Returns

Target Audience: **Requisitioner**

1. From the **Orders** icon in the **Navigation Menu**, go to **Orders, Search, and Purchase Orders.**

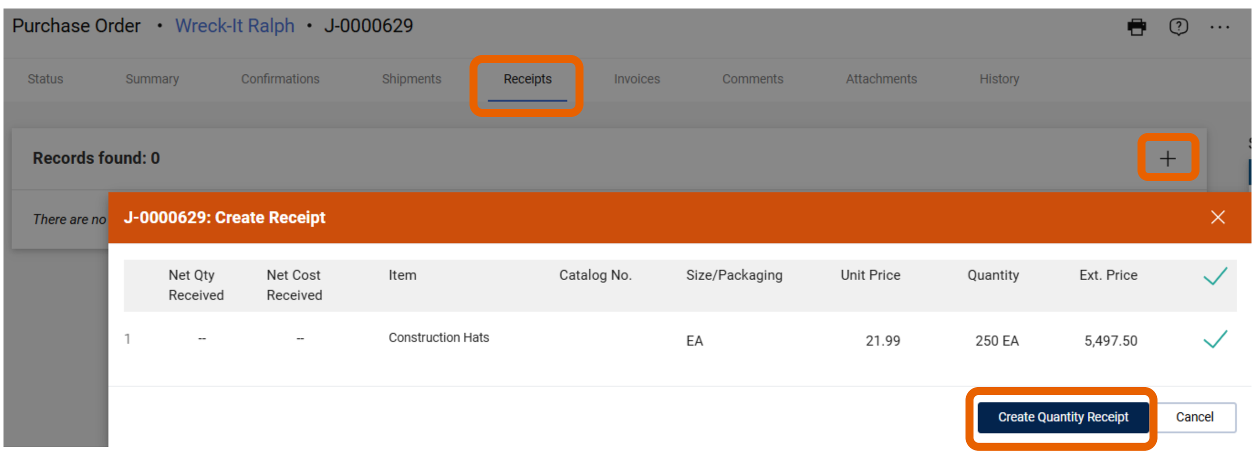


2. From the search results, select the purchase order number that requires a returned receipt.



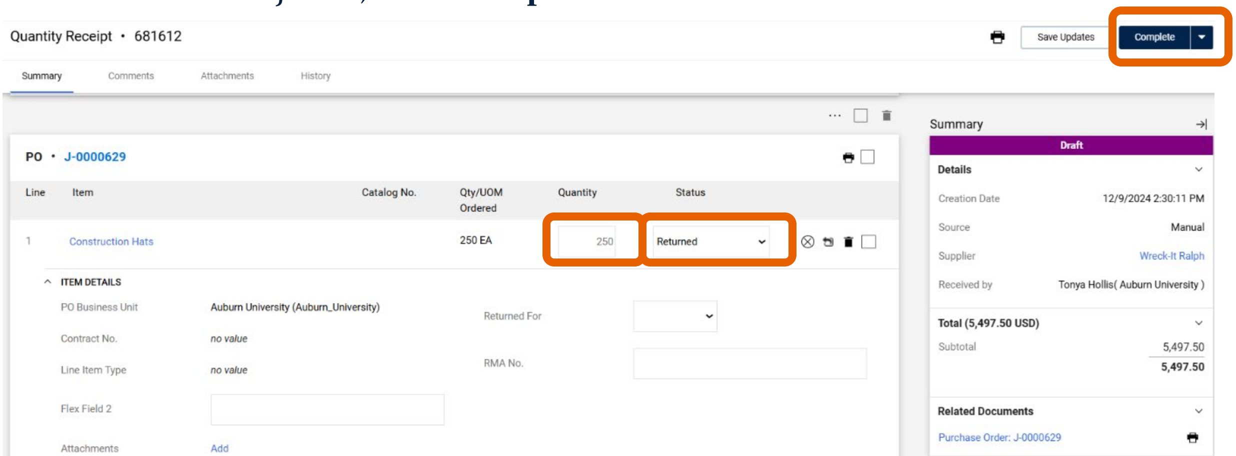
PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Matching Status	Total Amount
P0082137	Wreck-It Ralph	12/9/2024 2:03:30 PM	Completed	4179208	Tonya Hollis	Sent To Supplier	No Matches	1,250.00 USD
P0082135	Wreck-It Ralph	12/3/2024 2:38:03 PM	Completed	4174914	Matthew Pike	Sent To Supplier	Partially Matched	1,000.00 USD
J-0000636	Wreck-It Ralph	12/3/2024 2:15:57 PM	Pending	4174841	Matthew Pike	No Shipments	No Matches	100.00 USD
P0082133	Wreck-It Ralph	11/19/2024 2:55:41 PM	Completed	4166000	Matthew Pike	Sent To Supplier	No Matches	5,500.00 USD
J-0000634	Wreck-It Ralph	11/14/2024 1:33:14 PM	Pending	4164573	Matthew Pike	No Shipments	No Matches	5,500.00 USD
P0082132	Wreck-It Ralph	11/14/2024 1:27:14 PM	Completed	4164549	Matthew Pike	Sent To Supplier	No Matches	5,500.00 USD
P0082131	Wreck-It Ralph	10/31/2024 10:01:37 AM	Completed	4152751	Tonya Hollis	Sent To Supplier	Fully Matched	5,497.50 USD
J-0000631	Wreck-It Ralph	10/30/2024 4:01:09 PM	Completed	4151482	Tonya Hollis	Sent To Supplier	No Matches	5,497.50 USD
J-0000630	Stuffy's Stuff	10/30/2024 12:11:29 PM	Pending	4151369	Matthew Pike	No Shipments	No Matches	5,000.00 USD
J-0000629	Wreck-It Ralph	10/30/2024 12:00:30 PM	Pending	4151364	Tonya Hollis	No Shipments	No Matches	5,497.50 USD
J-0000628	Wreck-It Ralph	10/30/2024 11:07:58 AM	Pending	4151187	Tonya Hollis	No Shipments	No Matches	5,497.50 USD
J-0000627	Wreck-It Ralph	10/30/2024 10:02:59 AM	Pending	4150875	Tonya Hollis	No Shipments	No Matches	5,497.50 USD

3. Click the **Receipt** tab at the top of the PO, then click the **+** sign to add a return receipt and choose **Create Quantity Receipt**.



AUBURN UNIVERSITY
Procurement and Business Services

4. To create a return receipt, edit the **Quantity** and **Line Status** to reflect items that are being returned. The **Line Status** should reflect **Returned**. After the **Quantity** and **Line Status** is adjusted, select **Complete**.

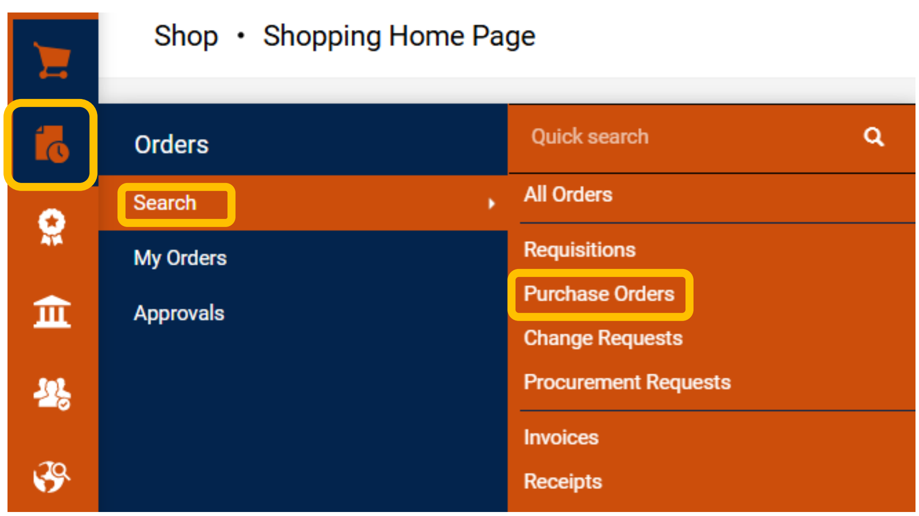


6.3 Creating Cost Receipts

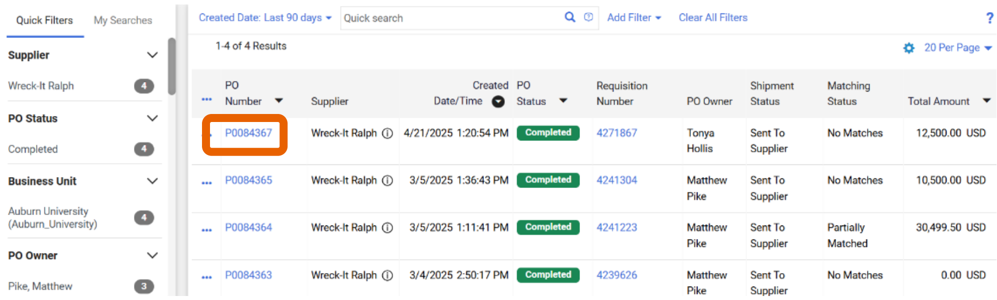
Target Audience: **Requisitioner**

Once the product or service is received, the receipt **must** be acknowledged in TigerBuy prior to payment. The end user must create a receipt for all PO orders. Cost receipts are used to document a specific dollar amount of items that have been purchased and received.

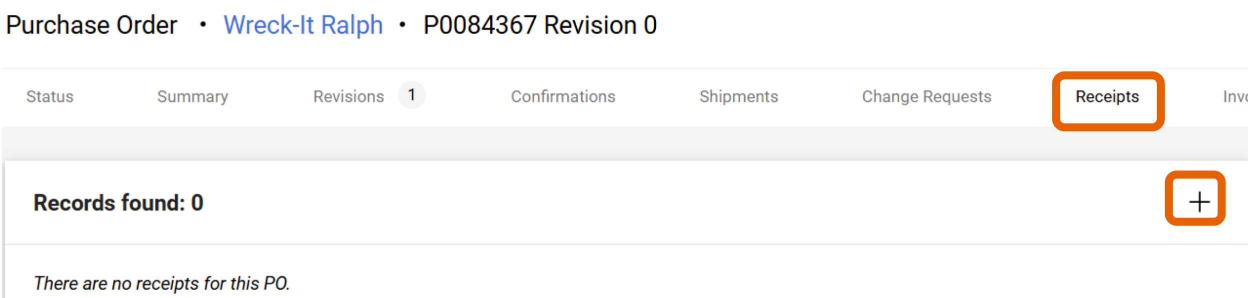
1. From the **Orders** icon in the **Navigation Menu**, go to **Orders, Search, and Purchase Orders.**



2. From the search results, select the purchase order number that requires a cost receipt.



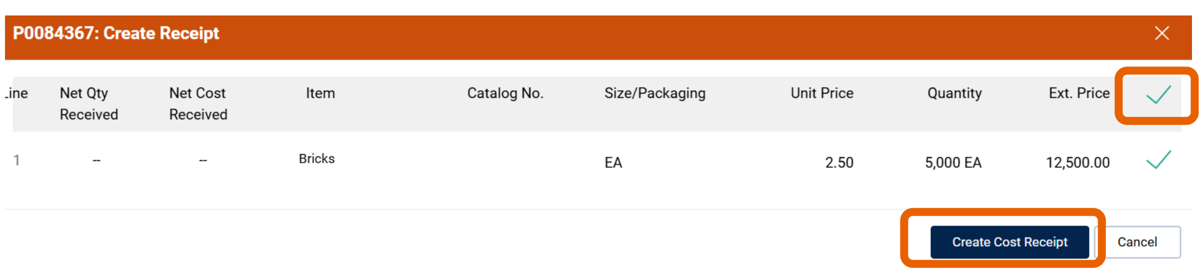
3. Click the **Receipt** tab at the top of the PO, then click the **+** sign to add a receipt.



4. In the **Line Details** section, verify the **Cost** and **Line Status** to reflect items that have been received. If you did not receive the full dollar amount ordered, note the amount of the order that you did receive. This will reflect a partial order received.

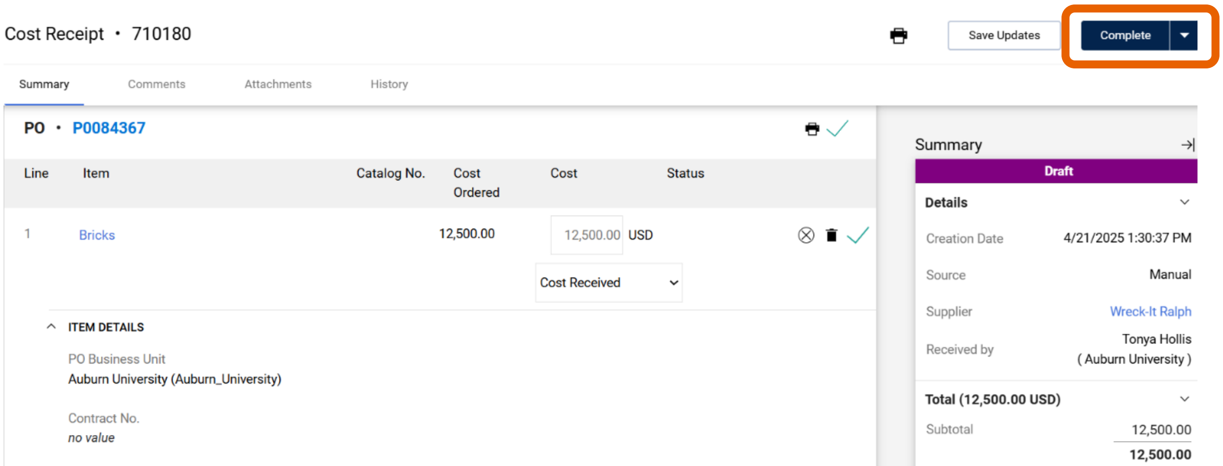
   The ordered cost will default in the **Cost** field. If previous receipts have been entered, the open cost left on the purchase order will be reflected in the **Cost** field. If you received more or less of the items on the line, change the cost to the amount received. Do not over-receive unless you are approving payment for over-receipt. In that case, you may need a change request.

   If you have multiple lines on your purchase order and only want to receive some of the lines, remove the lines you do not want to receive by clicking the **Trash Can** icon.

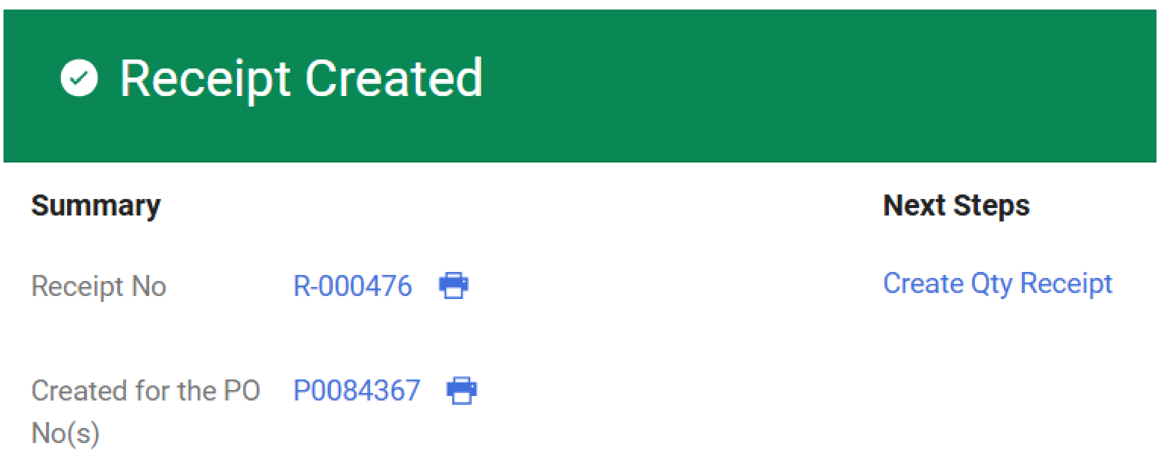


AUBURN UNIVERSITY
Procurement and Business Services

5. In the top right-hand corner, select **Complete**.



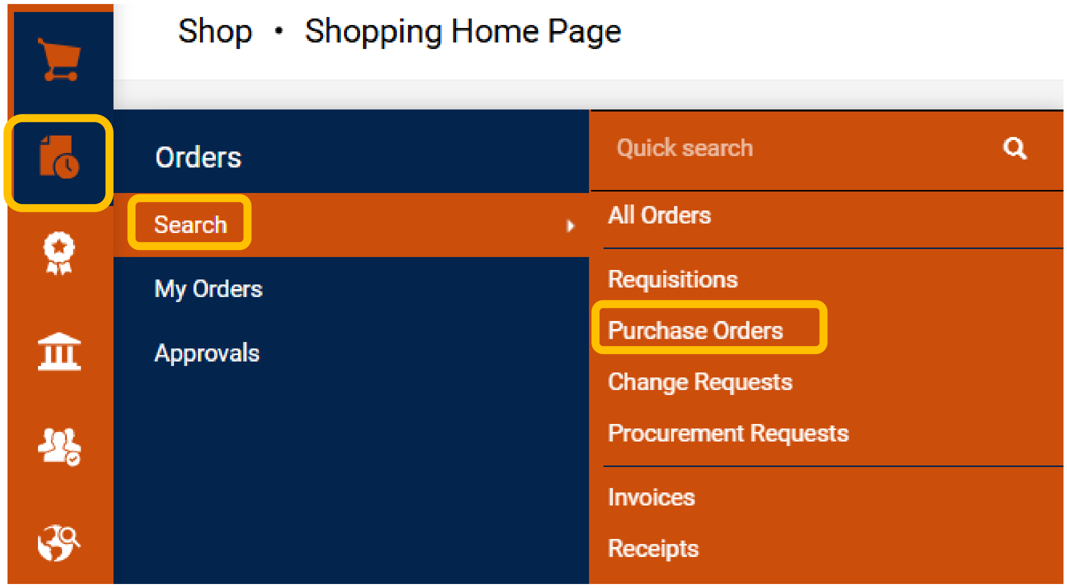
6. A receipt page for the PO will appear. To go back to the main PO search page, select **Create Quantity Receipt**.



6.4 Canceling a Receipt

Target Audience: **Requisitioner**

1. From the **Orders** icon in the **Navigation Menu**, go to **Orders, Search, and Purchase Orders.**



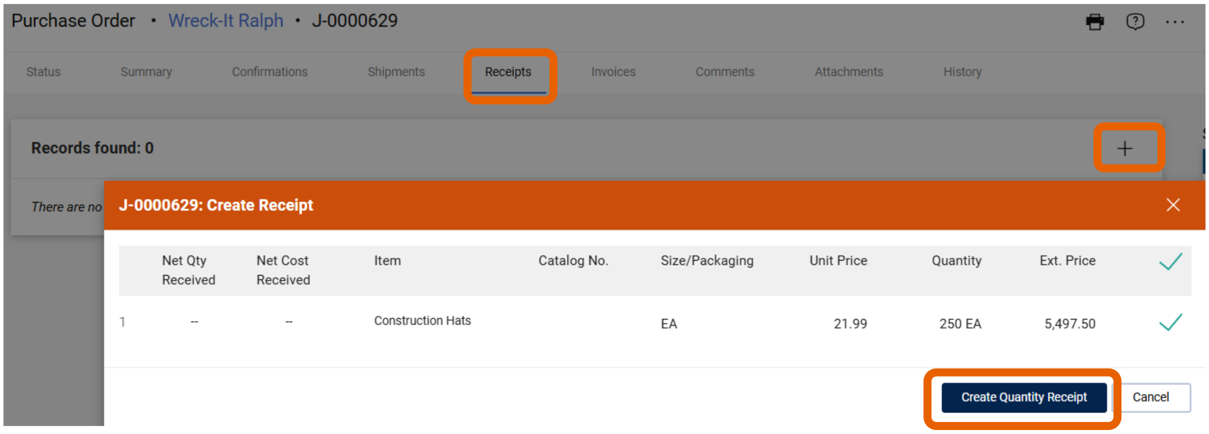
2. From the search results, select the purchase order number that requires a canceled receipt.

Created Date: Last 90 days | Quick search | Add Filter | Clear All Filters

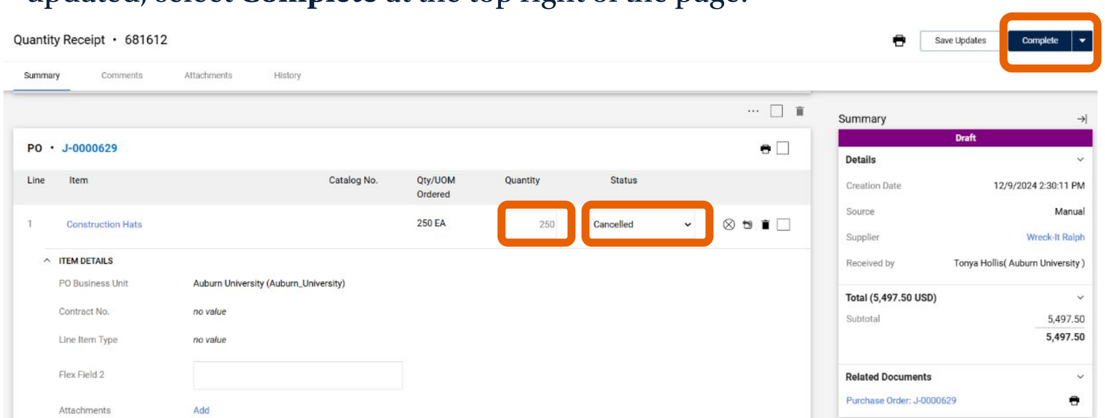
1-12 of 12 Results — 20 Per Page

PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Matching Status	Total Amount
P0082137	Wreck-It Ralph	12/9/2024 2:03:30 PM	Completed	4179208	Tonya Hollis	Sent To Supplier	No Matches	1,250.00 USD
P0082135	Wreck-It Ralph	12/3/2024 2:38:03 PM	Completed	4174914	Matthew Pike	Sent To Supplier	Partially Matched	1,000.00 USD
J-0000636	Wreck-It Ralph	12/3/2024 2:15:57 PM	Pending	4174841	Matthew Pike	No Shipments	No Matches	100.00 USD
P0082133	Wreck-It Ralph	11/19/2024 2:55:41 PM	Completed	4166000	Matthew Pike	Sent To Supplier	No Matches	5,500.00 USD
J-0000634	Wreck-It Ralph	11/14/2024 1:33:14 PM	Pending	4164573	Matthew Pike	No Shipments	No Matches	5,500.00 USD
P0082132	Wreck-It Ralph	11/14/2024 1:27:14 PM	Completed	4164549	Matthew Pike	Sent To Supplier	No Matches	5,500.00 USD
P0082131	Wreck-It Ralph	10/31/2024 10:01:37 AM	Completed	4152751	Tonya Hollis	Sent To Supplier	Fully Matched	5,497.50 USD
J-0000631	Wreck-It Ralph	10/30/2024 4:01:09 PM	Completed	4151482	Tonya Hollis	Sent To Supplier	No Matches	5,497.50 USD
J-0000630	Stuffy's Stuff	10/30/2024 12:11:29 PM	Pending	4151369	Matthew Pike	No Shipments	No Matches	5,000.00 USD
J-0000629	Wreck-It Ralph	10/30/2024 12:00:30 PM	Pending	4151364	Tonya Hollis	No Shipments	No Matches	5,497.50 USD
J-0000628	Wreck-It Ralph	10/30/2024 11:07:58 AM	Pending	4151187	Tonya Hollis	No Shipments	No Matches	5,497.50 USD
J-0000627	Wreck-It Ralph	10/30/2024 10:02:59 AM	Pending	4150875	Tonya Hollis	No Shipments	No Matches	5,497.50 USD

3. Click the **Receipt** tab at the top of the PO, then click the **+** sign to add a receipt and choose **Create Quantity Receipt**.



4. To cancel the receipt, edit the **Quantity** and **Line Status** to reflect items that are being returned. The **Line Status** should reflect **Canceled**. Once those items are updated, select **Complete** at the top right of the page.

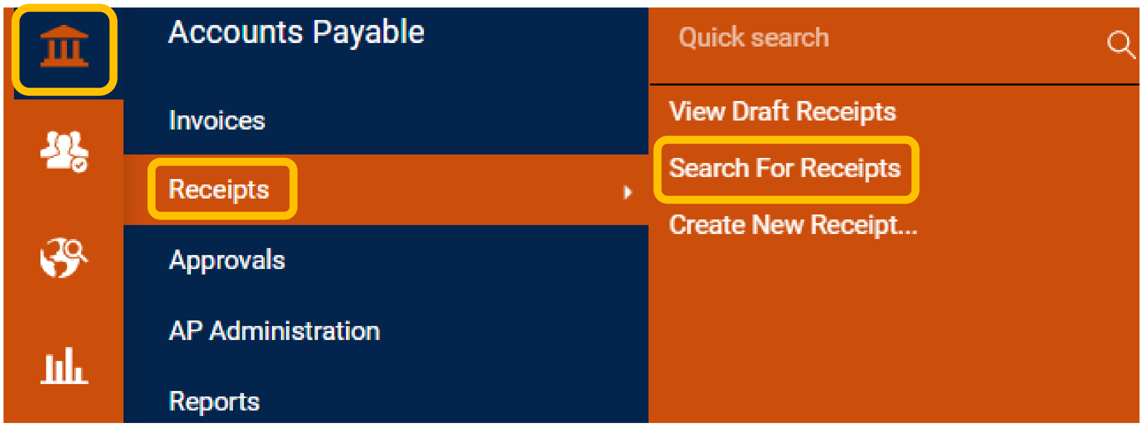


6.5 Viewing Receipts

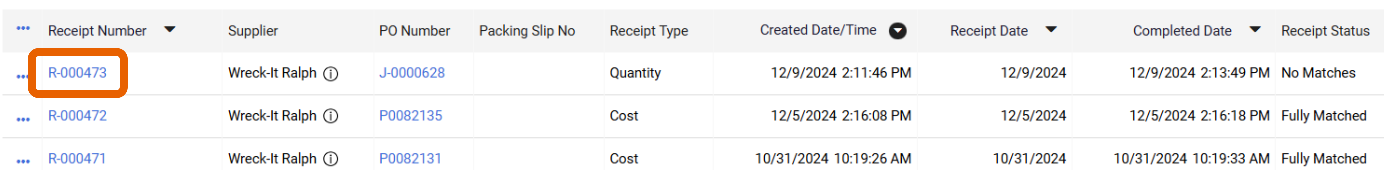
Target Audience: **Requisitioner**

After receipts are created, users will have the ability to view receipts for purchases that have been received, returned, and/or canceled.

1. Go to the **Navigation Menu**, select **Accounts Payable, Receipts, and Search for Receipts.**

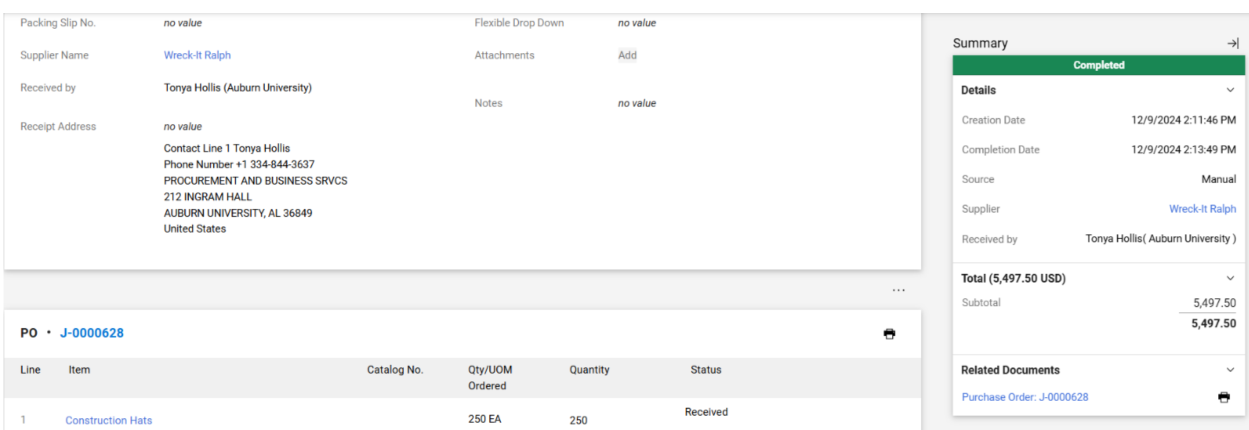


2. Select the receipt number you would like to view.



Receipt Number	Supplier	PO Number	Packing Slip No	Receipt Type	Created Date/Time	Receipt Date	Completed Date	Receipt Status
R-000473	Wreck-It Ralph	J-0000628		Quantity	12/9/2024 2:11:46 PM	12/9/2024	12/9/2024 2:13:49 PM	No Matches
R-000472	Wreck-It Ralph	P0082135		Cost	12/5/2024 2:16:08 PM	12/5/2024	12/5/2024 2:16:18 PM	Fully Matched
R-000471	Wreck-It Ralph	P0082131		Cost	10/31/2024 10:19:26 AM	10/31/2024	10/31/2024 10:19:33 AM	Fully Matched

3. The desired receipt number will appear.



Auburn University TigerBuy

Module 7: Invoice Approvals & AP Forms

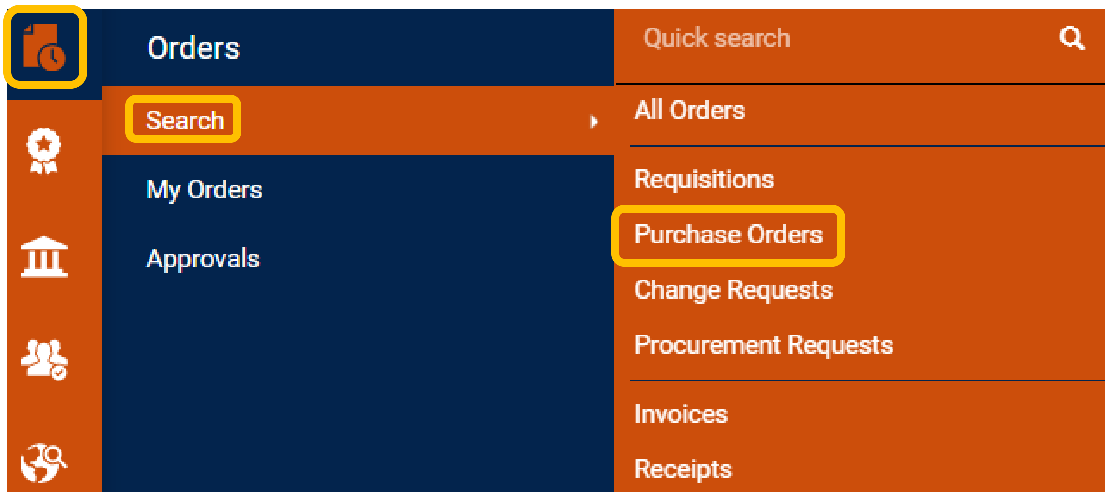
AUBURN UNIVERSITY
Procurement and Business Services

7.0 Creating an Invoice from a PO

Target Audience: **Invoice Approver**

Users have the ability to create invoices for purchase orders.

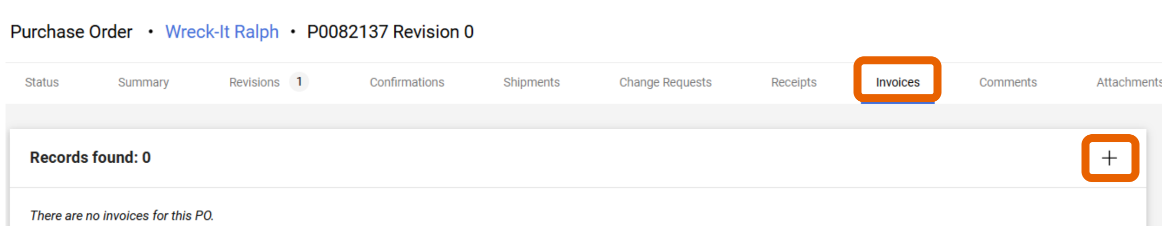
1. Navigate to **Orders** icon in the Navigation menu bar. Go to **Search** and **Purchase Orders**.



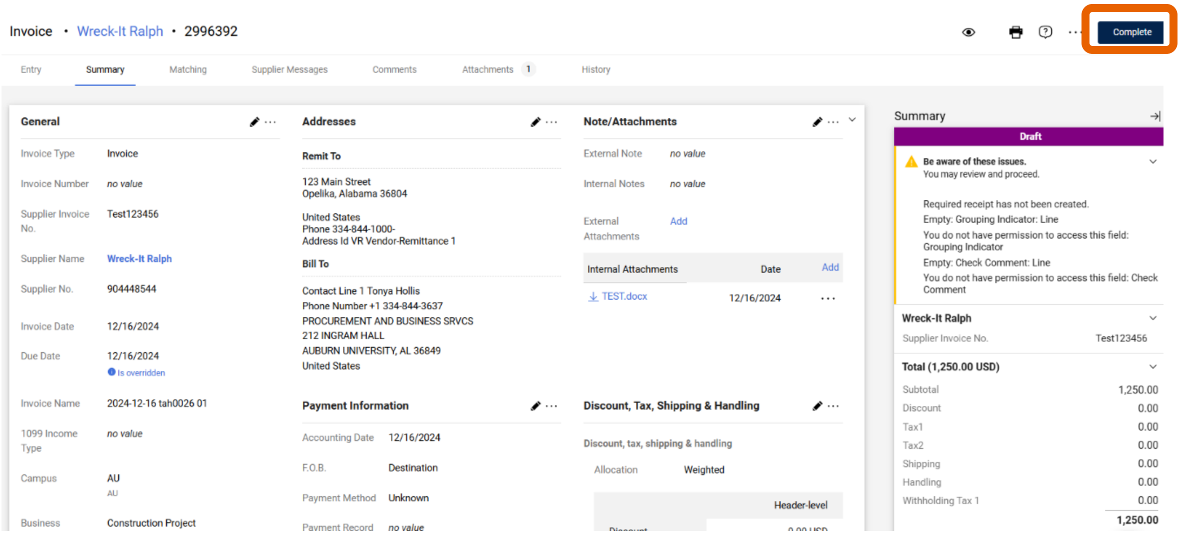
2. Select the purchase order that requires the creation of an invoice.

PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Matching Status	Total Amount
P0082137	Wreck-It Ralph	12/9/2024 2:03:30 PM	Completed	4179208	Tonya Hollis	Sent To Supplier	No Matches	1,250.00 USD
P0082135	Wreck-It Ralph	12/3/2024 2:38:03 PM	Completed	4174914	Matthew Pike	Sent To Supplier	Partially Matched	1,000.00 USD
J-0000636	Wreck-It Ralph	12/3/2024 2:15:57 PM	Pending	4174841	Matthew Pike	No Shipments	No Matches	100.00 USD
P0082133	Wreck-It Ralph	11/19/2024 2:55:41 PM	Completed	4166000	Matthew Pike	Sent To Supplier	No Matches	5,500.00 USD
J-0000634	Wreck-It Ralph	11/14/2024 1:33:14 PM	Pending	4164573	Matthew Pike	No Shipments	No Matches	5,500.00 USD
P0082132	Wreck-It Ralph	11/14/2024 1:27:14 PM	Completed	4164549	Matthew Pike	Sent To Supplier	No Matches	5,500.00 USD
P0082131	Wreck-It Ralph	10/31/2024 10:01:37 AM	Completed	4152751	Tonya Hollis	Sent To Supplier	Fully Matched	5,497.50 USD
J-0000631	Wreck-It Ralph	10/30/2024 4:01:09 PM	Completed	4151482	Tonya Hollis	Sent To Supplier	No Matches	5,497.50 USD
J-0000630	Stuffy's Stuff	10/30/2024 12:11:29 PM	Pending	4151369	Matthew Pike	No Shipments	No Matches	5,000.00 USD
J-0000629	Wreck-It Ralph	10/30/2024 12:00:30 PM	Pending	4151364	Tonya Hollis	No Shipments	No Matches	5,497.50 USD
J-0000628	Wreck-It Ralph	10/30/2024 11:07:58 AM	Pending	4151187	Tonya Hollis	No Shipments	No Matches	5,497.50 USD
J-0000627	Wreck-It Ralph	10/30/2024 10:02:59 AM	Pending	4150875	Tonya Hollis	No Shipments	No Matches	5,497.50 USD

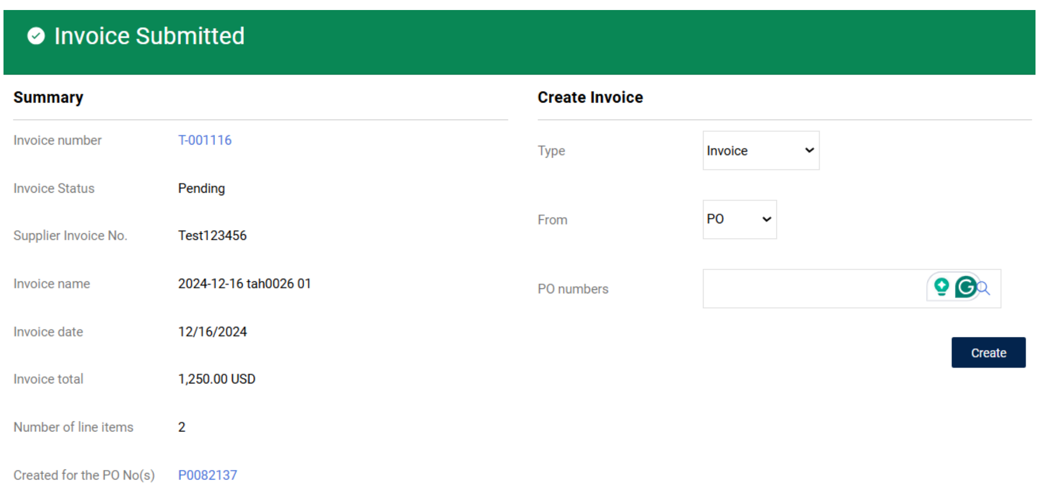
3. Click the **Invoices** tab at the top of the PO. Then click the + sign to add an invoice.



4. Complete all the required fields and select **Complete**.
   Invoice number is required and must not be a duplicate number for that supplier. Click **Save** after entering the invoice number.
   **Due Date will default to current date and should remain as such.
   **Note that required fields are in red and warnings (not required) are in yellow.



5. A confirmation of the completed invoice will be displayed.

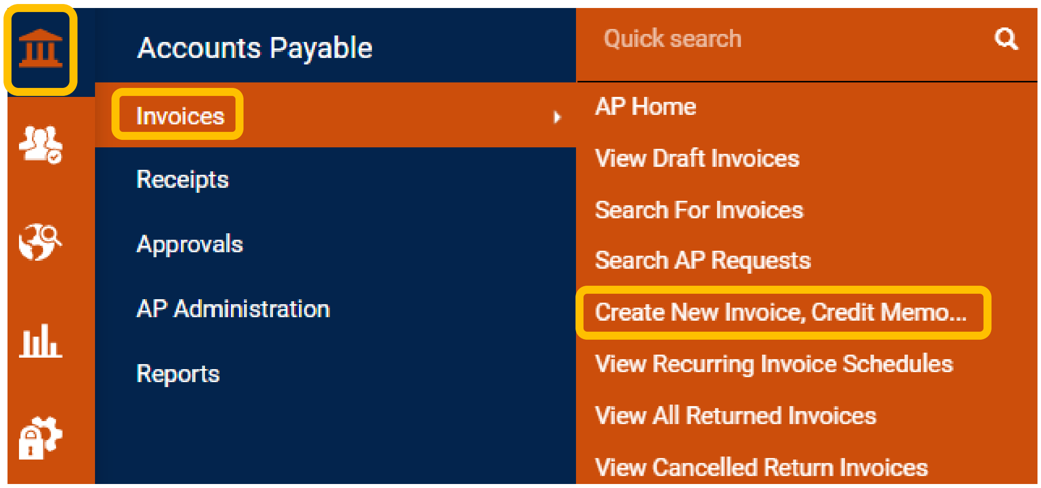


7.1 Creating a non-PO Invoice

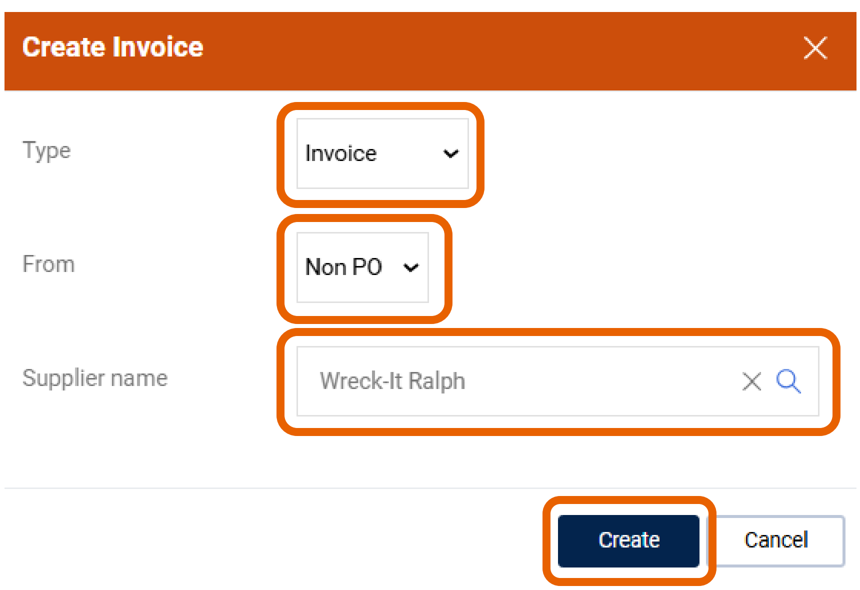
Target Audience: Invoice Approver

Users have the ability to create invoices for non-purchase order payments.

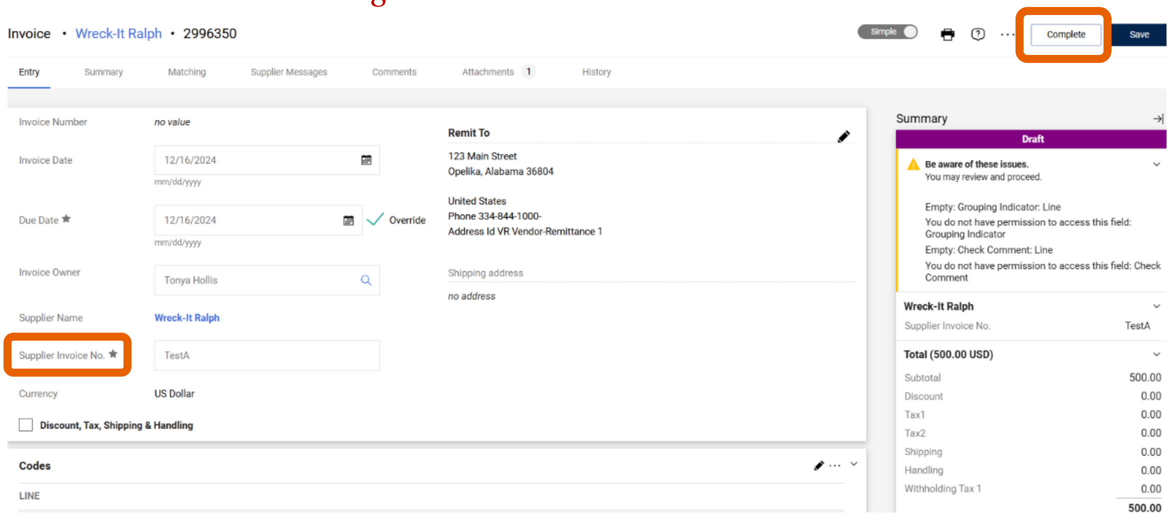
1. Navigate to the **Accounts Payable** icon in the Navigation menu bar. Go to **Invoices** and **Create New Invoice, Credit Memo**.



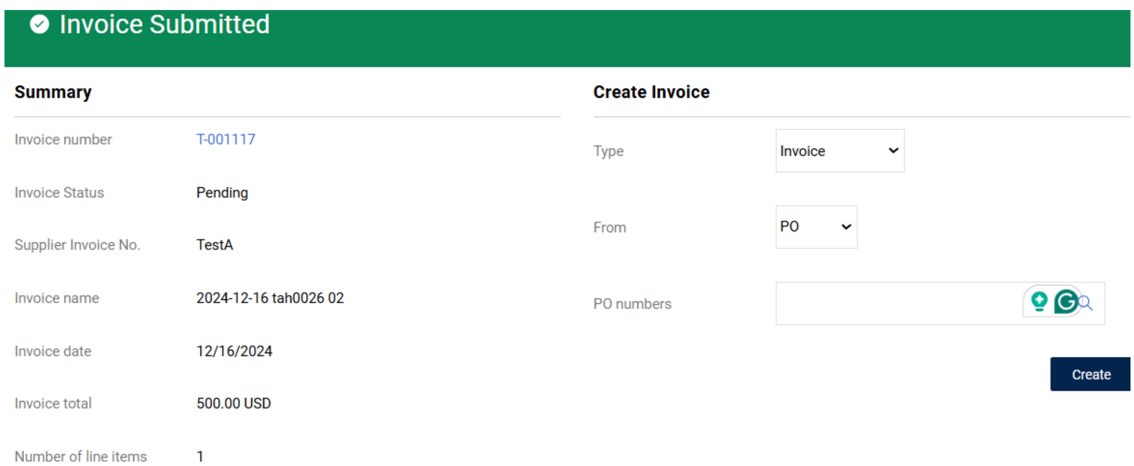
2. Select **Invoice, Non-PO**, and fill in the appropriate supplier. Click **Create**.



3. Complete all the required fields and select **Complete**.
Invoice number is required and must not be a duplicate number for that supplier. Click **Save** after entering the invoice number.



4. A confirmation of the completed invoice will be displayed.

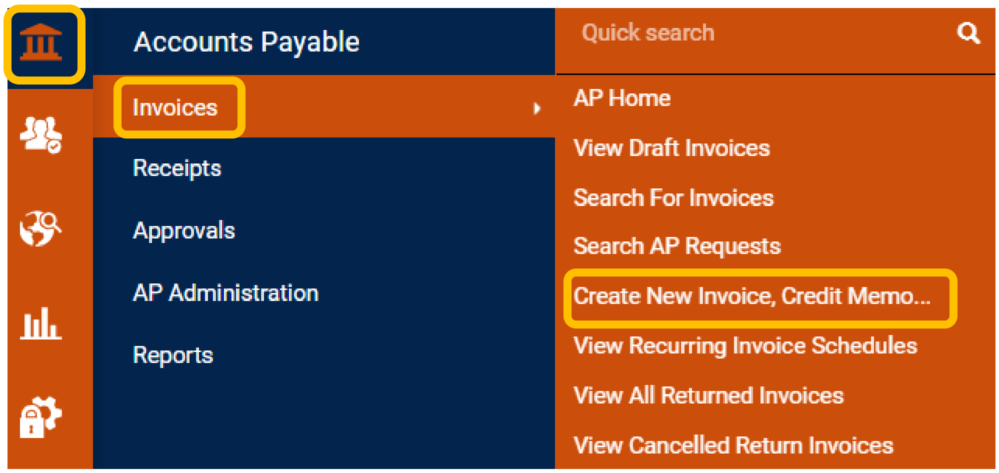


7.2 Creating a Credit Memo

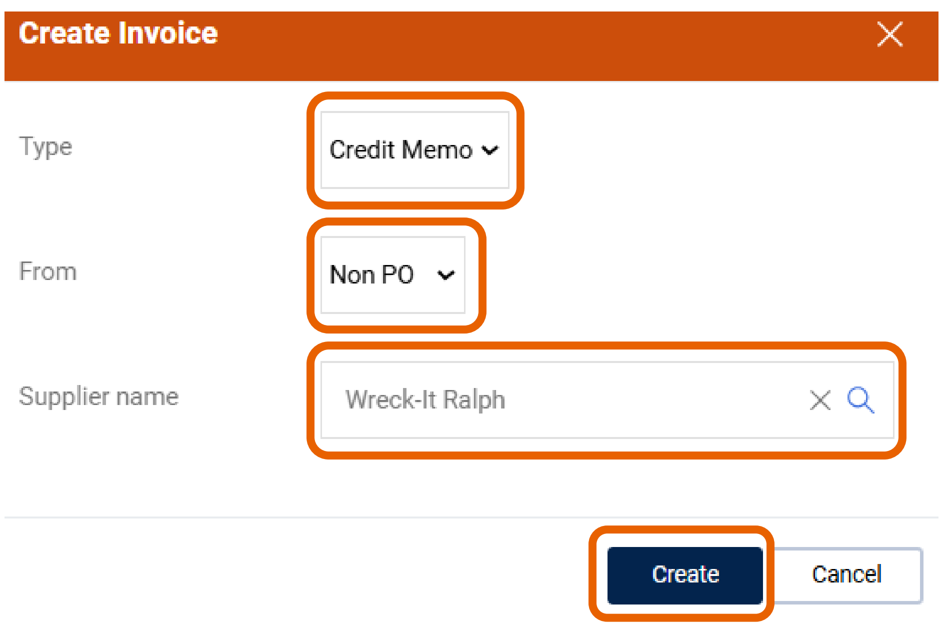
Target Audience: **Invoice Approver**

Users can enter a credit memo when necessary.

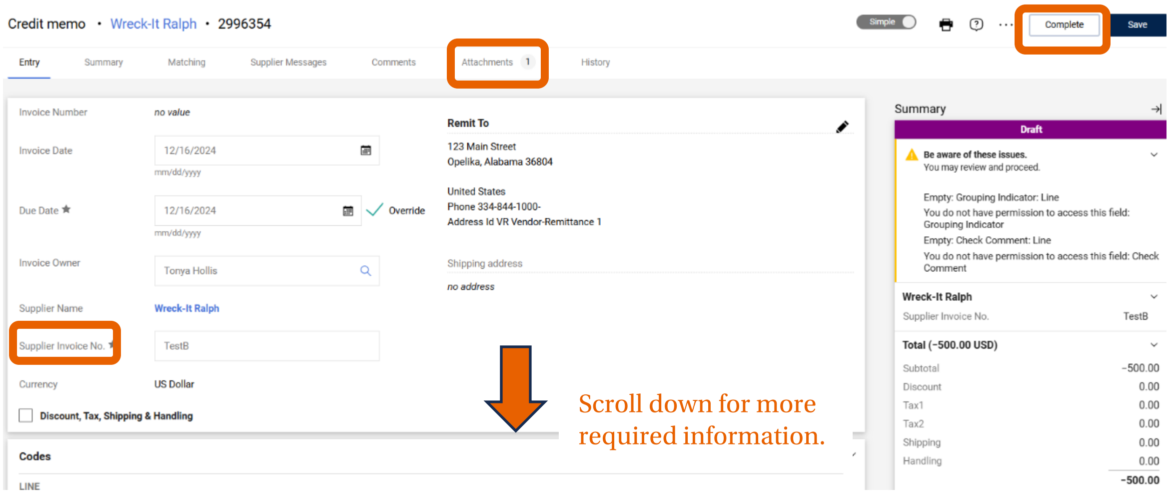
1. Navigate to the **Accounts Payable** icon in the **Navigation Menu** bar. Go to **Invoices** and **Create New Invoice, Credit Memo**.



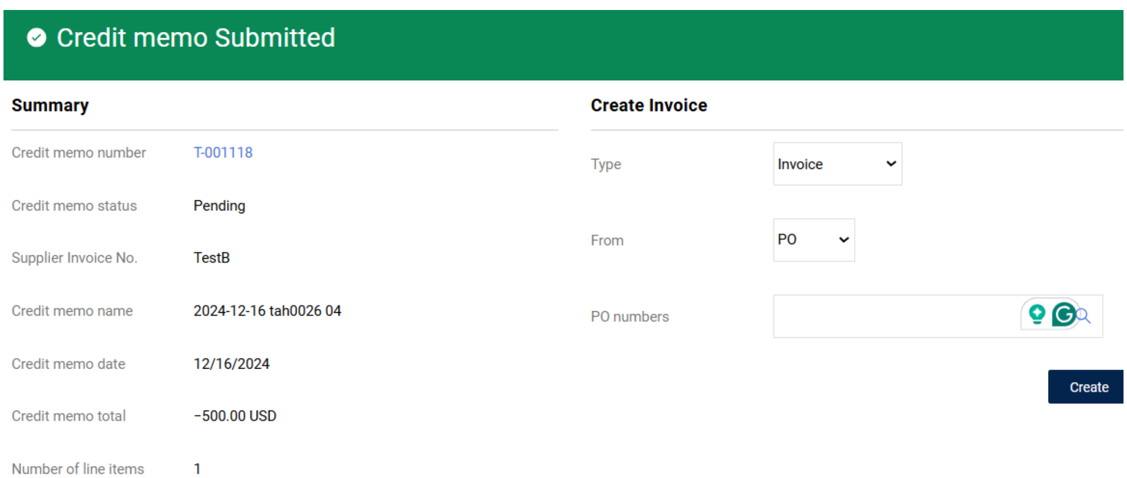
2. Choose **Credit Memo** for type. Select **Non-PO** and enter the supplier information when prompted. Select **Create**.



3. Complete all the required fields (invoice/credit number, FOAP information, enter the credit memo information as a new line item, and upload credit memo and any other documentation. Select **Complete**.
Invoice number is required and must not be a duplicate number for that supplier. Select Save after entering the invoice number.



4. A confirmation of the credit memo will be displayed.



AUBURN UNIVERSITY
Procurement and Business Services

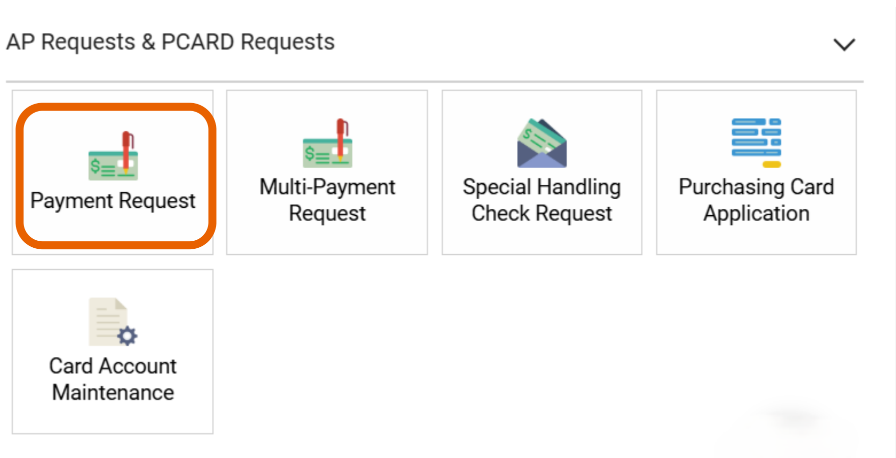
7.3 Creating a Payment Request

Target Audience: **Requisitioner**

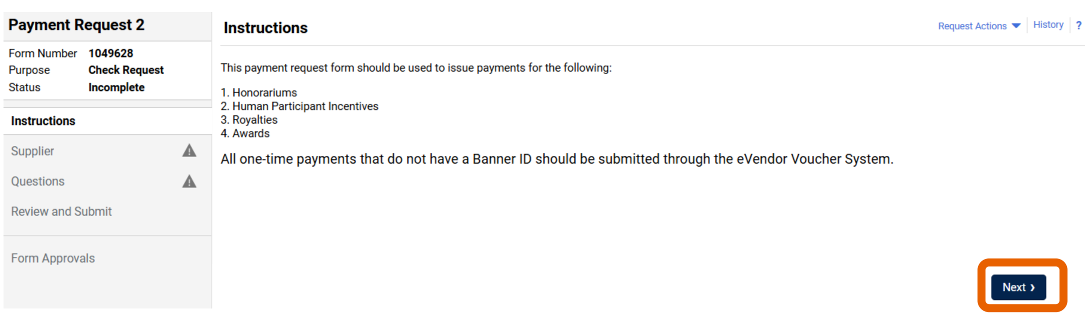
Payment requests should be submitted for payments that **do not require a purchase order** such as refunds, honorariums, Human Participant Incentives (HPI), royalties, and awards. All payment requests must be accompanied by supporting documentation upon submission.

This form should not be used for one-time payments for payees without a Banner ID. Please use the e-Vendor Voucher System for one-time payments.

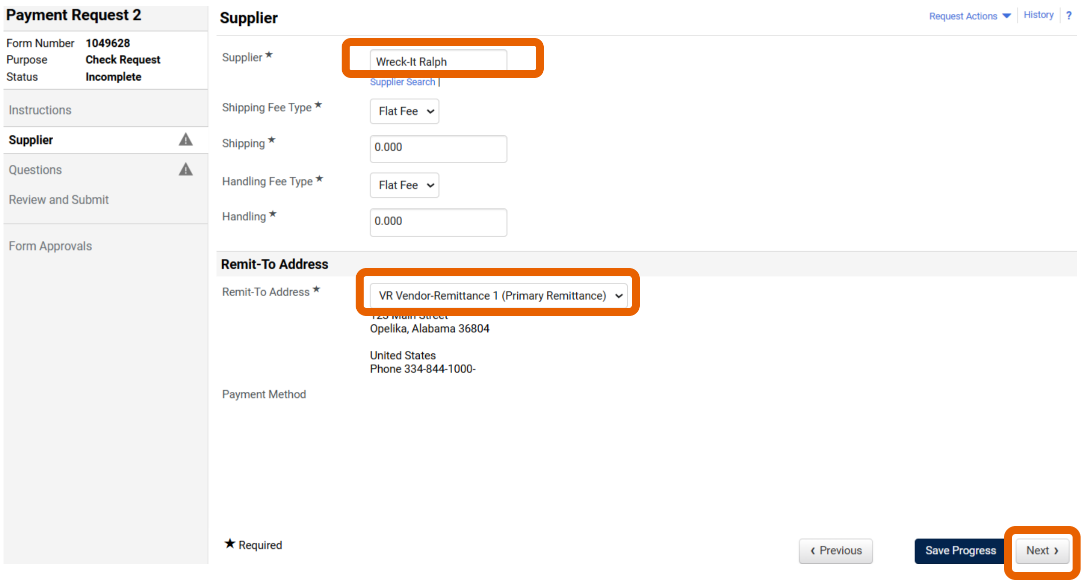
1. From the **Shopping Homepage**, select the **Payment Requests** icon in the **AP Forms** section.



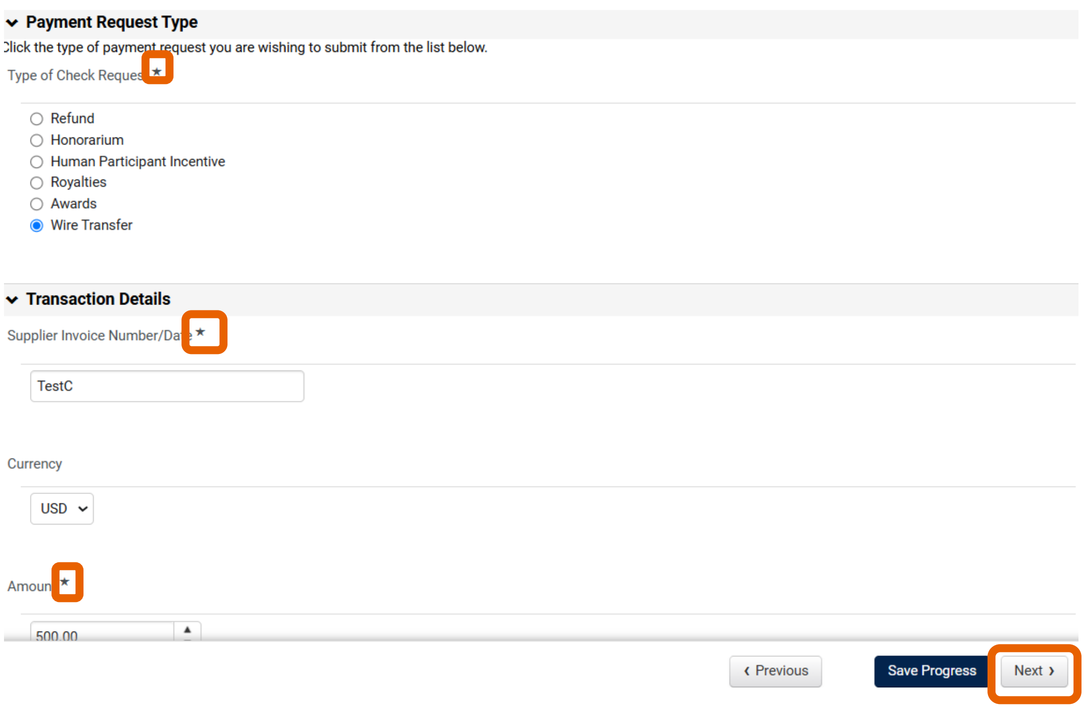
2. The **Payment Requests** form will appear. Read the instructions carefully and select **Next**.



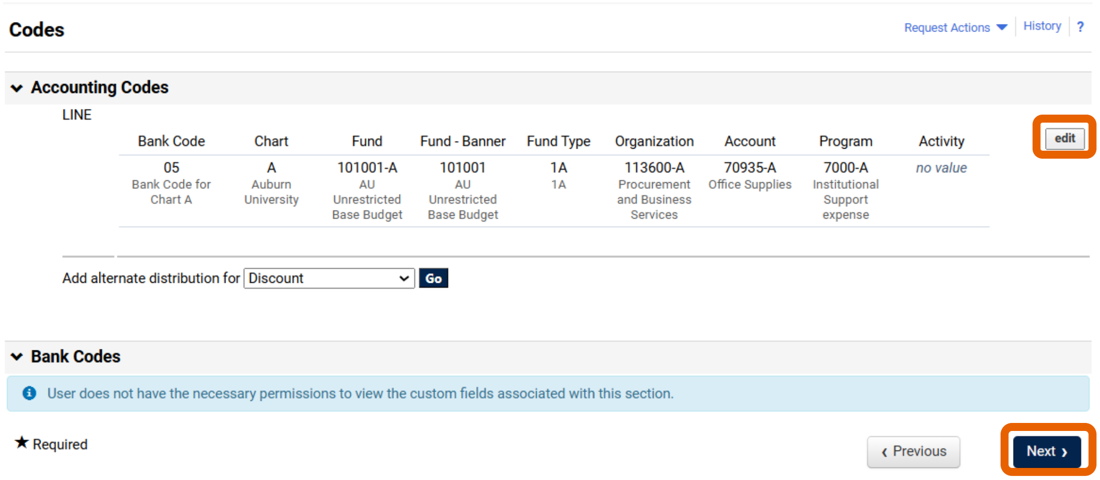
3. Fill in the supplier details. Required fields are marked with a star. Select **Next**.



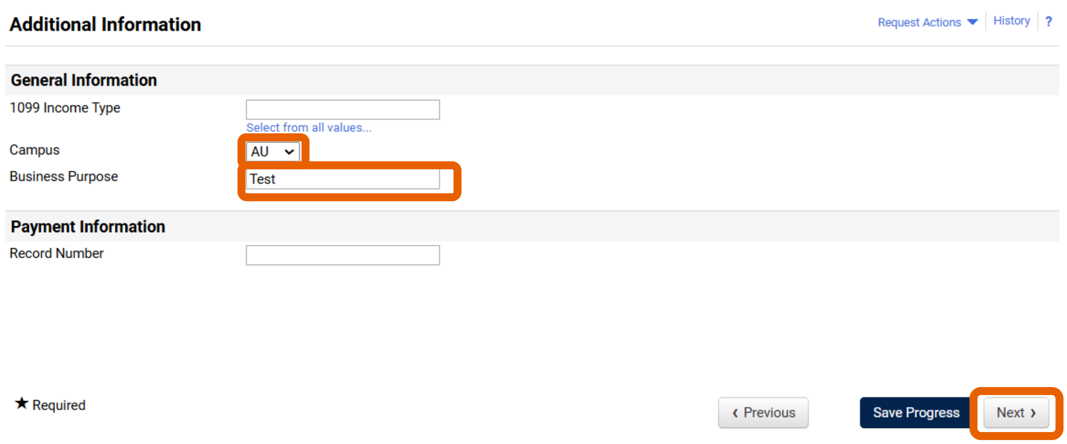
4. Next, fill in required information including payment request type, transaction details, and backup documentation.



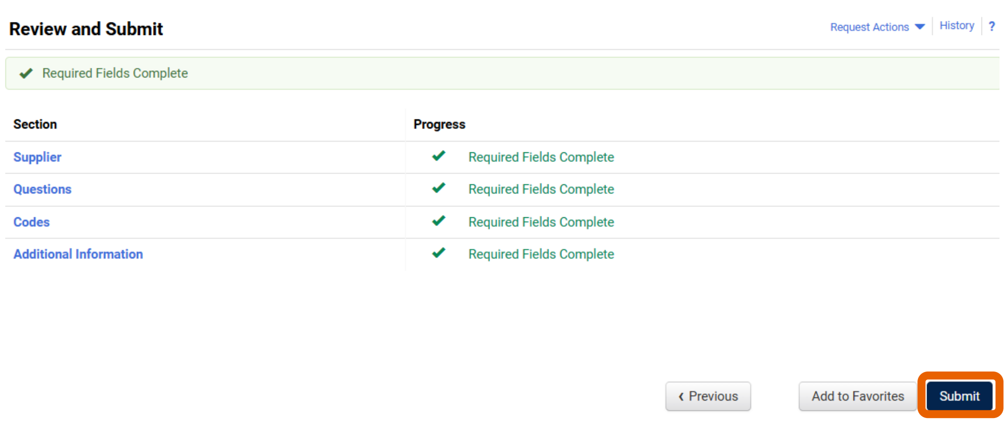
5. Select **Edit** to complete required fields for **Accounting Codes**. Select **Next**.



6. Fill in the required general information. Select **Next**.



7. Confirm all sections are complete. Select **Submit**.



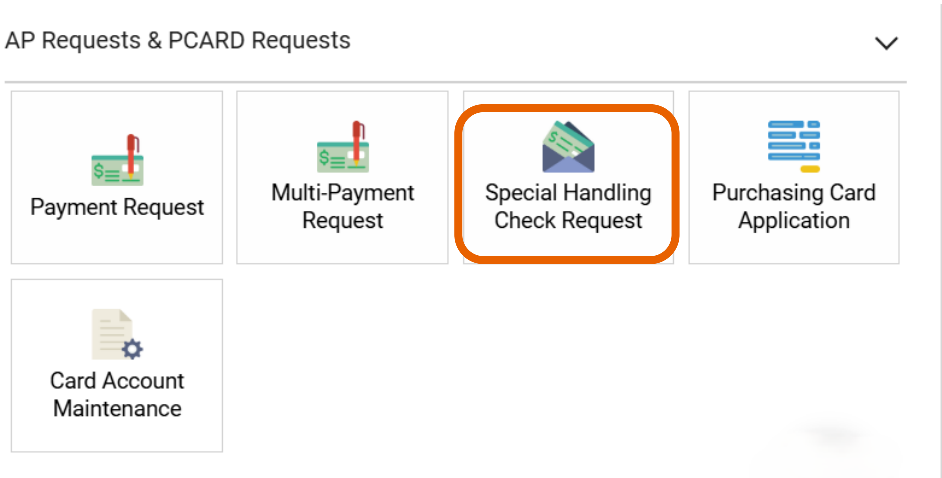
8. Check request will then be **Under Review**. This means it is now awaiting approval by a PBS auditor to be paid.

7.4 Creating a Special Handling Check Request

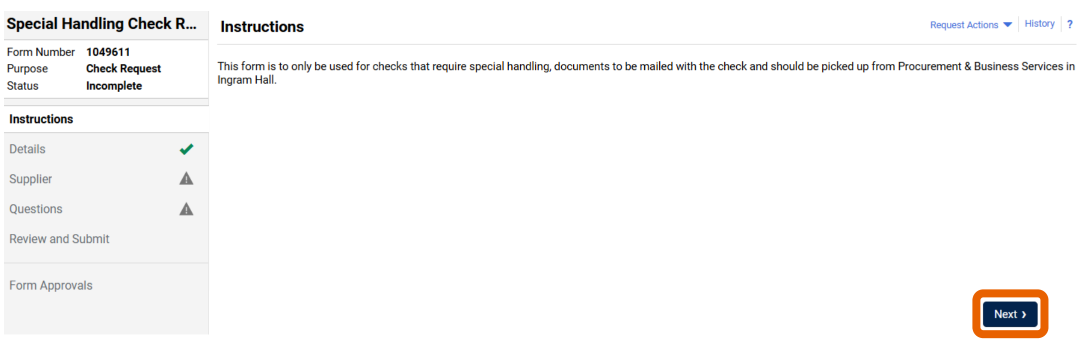
Target Audience: **Requisitioner**

Special Handling Check requests should be submitted for specific requests and the check will be held for pickup. All check requests must be accompanied by supporting documentation upon submission.

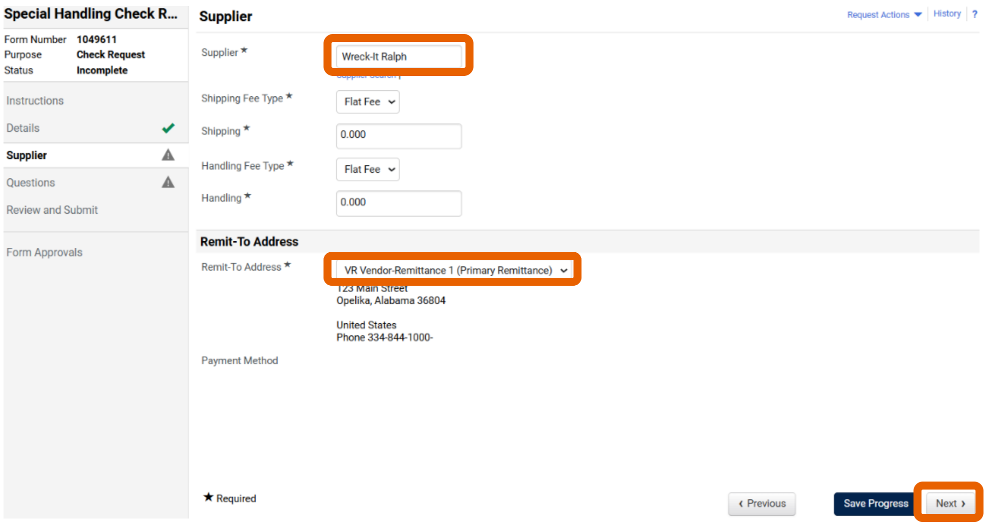
1. From the **Shopping Homepage**, select the **Special Handling Check Request** icon in the **AP Forms** section.



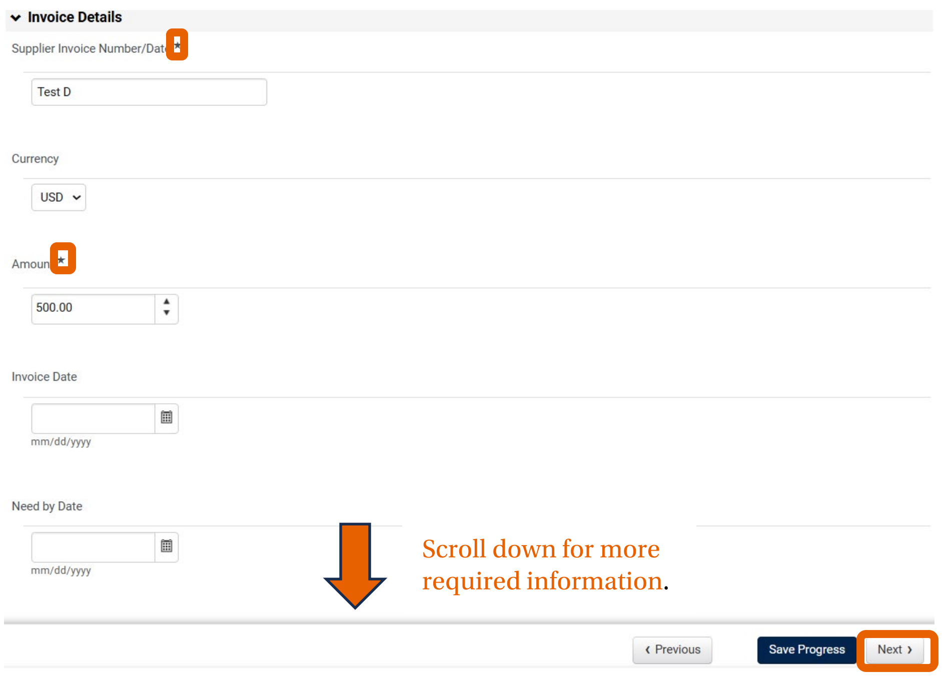
2. The **Special Handling Check Request** form will appear. Read the instructions carefully and select **Next**.



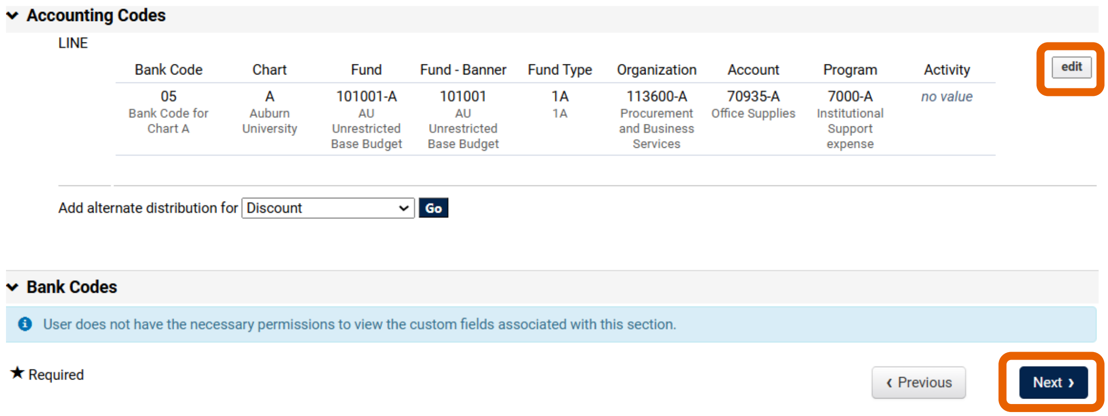
3. Fill in the supplier details. Required fields are marked with a star. Select **Next**.



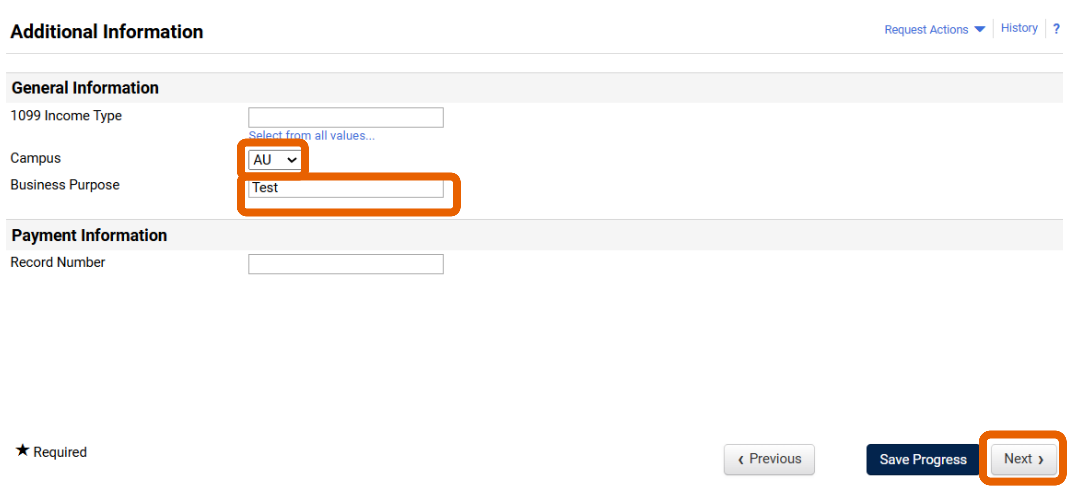
4. Next, fill in required information including invoice number, payment amount, invoice date, and upload any required documentation. Select **Next**.



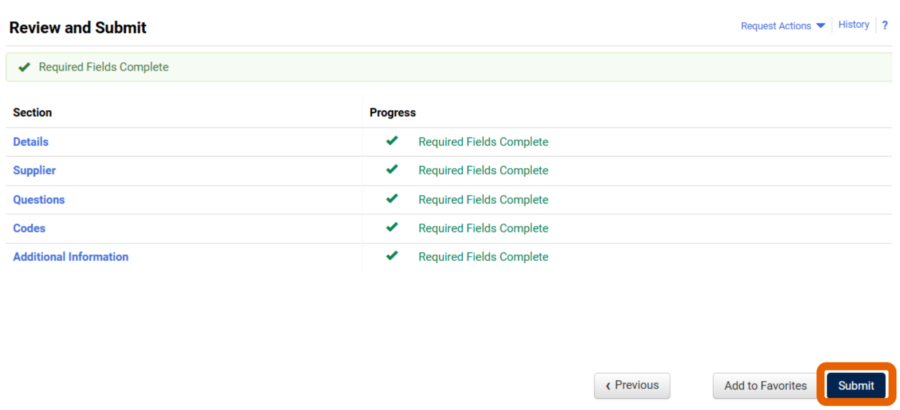
5. Select **Edit** to complete required fields for **Accounting Codes**. Select **Next**.



6. Fill in the needed general information. Select **Next**.



7. Confirm all sections are complete. Select **Submit**.



8. Check request will the be **Under Review**. This means it is now awaiting approval by PBS auditor to be paid.

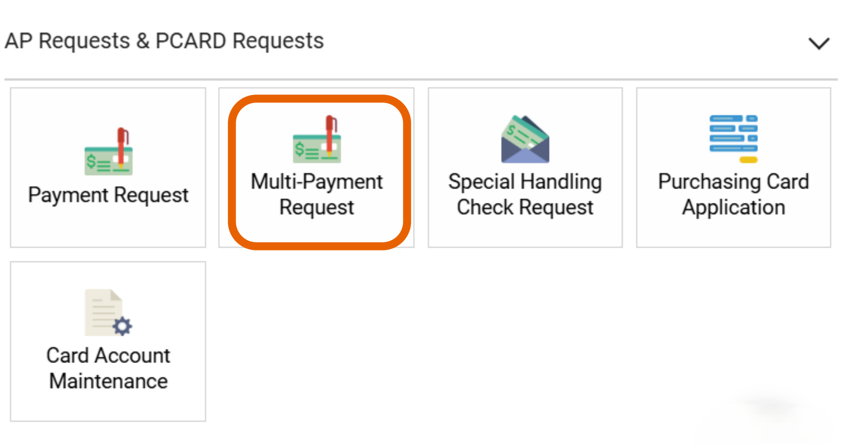
7.5 Creating a Multi-Payment Request

Target Audience: **Requisitioner**

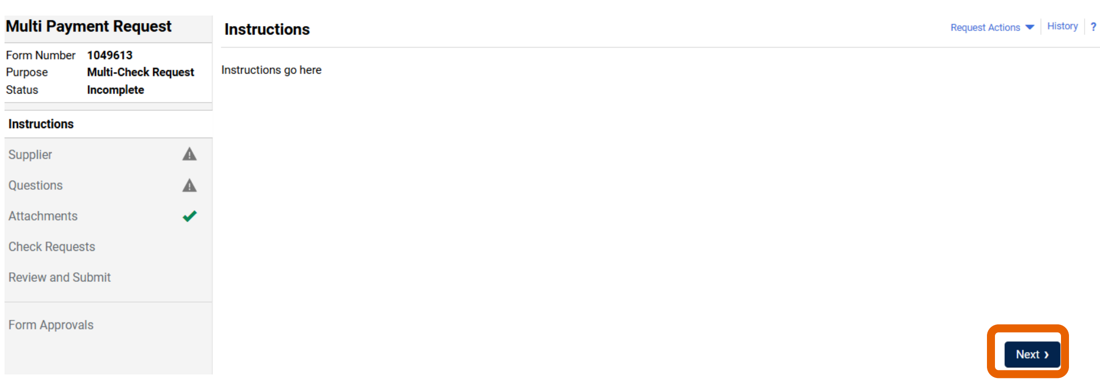
The **Multi-Payment Request** form should be submitted when you have multiple payees for payments that **do not require a purchase order**, such as refunds, honorariums, Human Participants Incentives (HPI), royalties, and awards. All payment requests must be accompanied by supporting documentation upon submission.

This form should not be used for one-time payments for payees without a Banner ID. Please use the e-Vendor Voucher System for one-time payments.

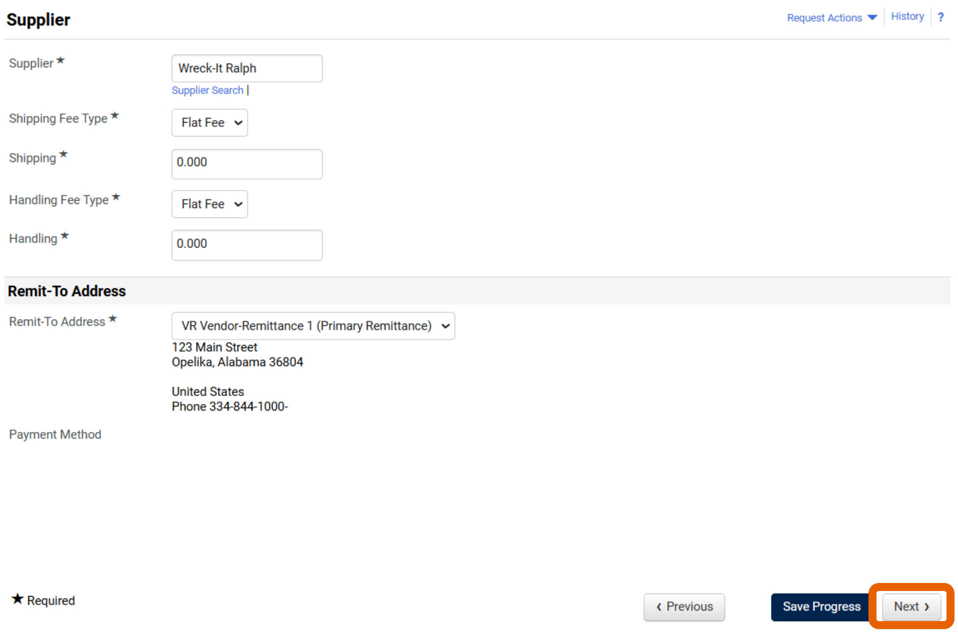
1. From the **Shopping Homepage**, select the **Payment Request** icon in the **AP Forms** section.



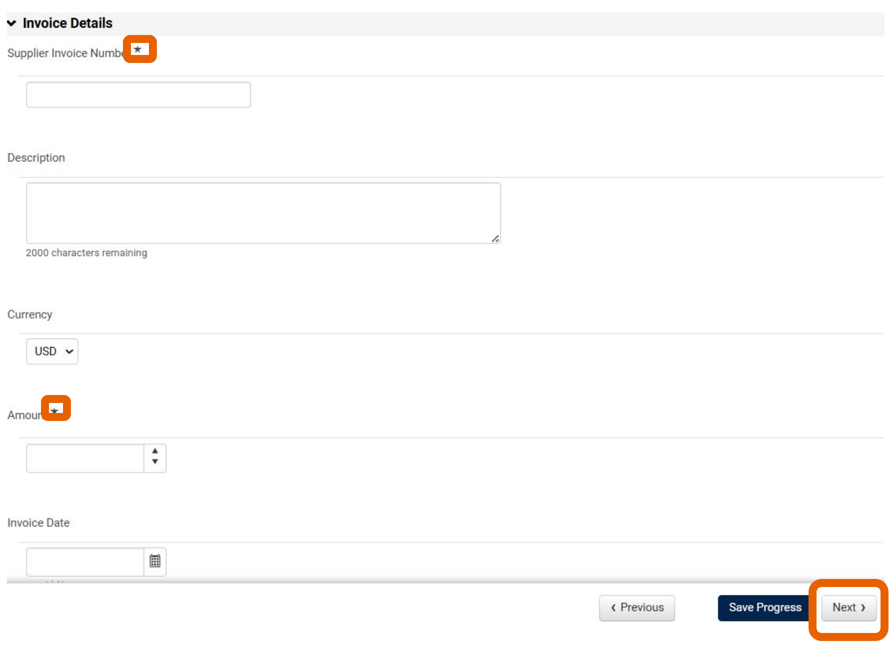
2. The **Multi-Payment Request** form will appear. Read the instructions carefully and select **Next**.



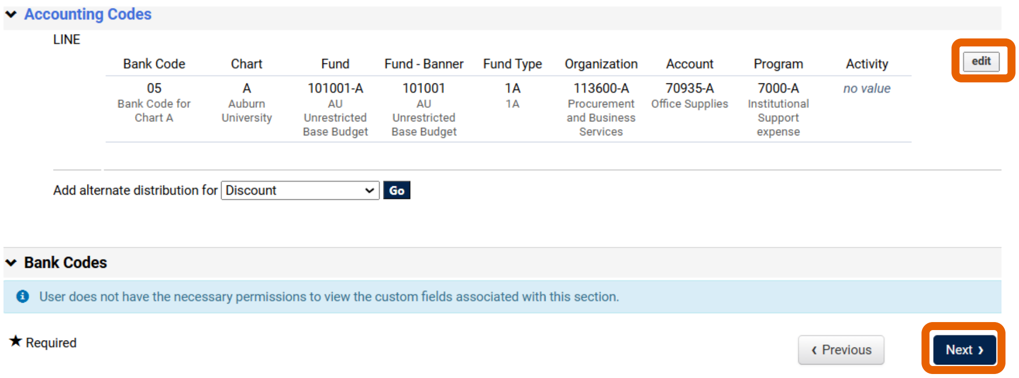
3. Fill in the supplier details. Required fields are marked with a star. Select **Next**.



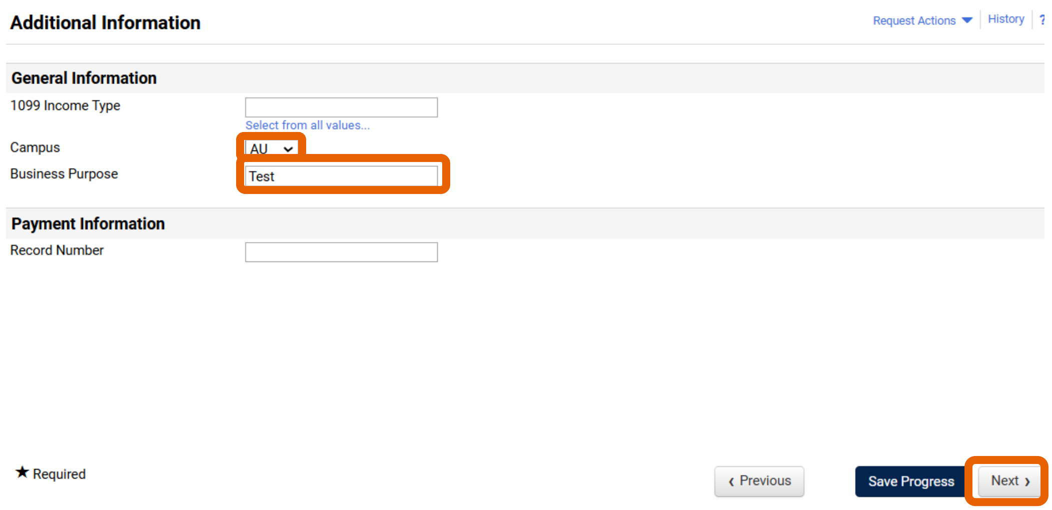
4. Next, fill in details for the request including invoice number (or date if no number), description, payment amount, invoice date, and campus. Select **Next**.



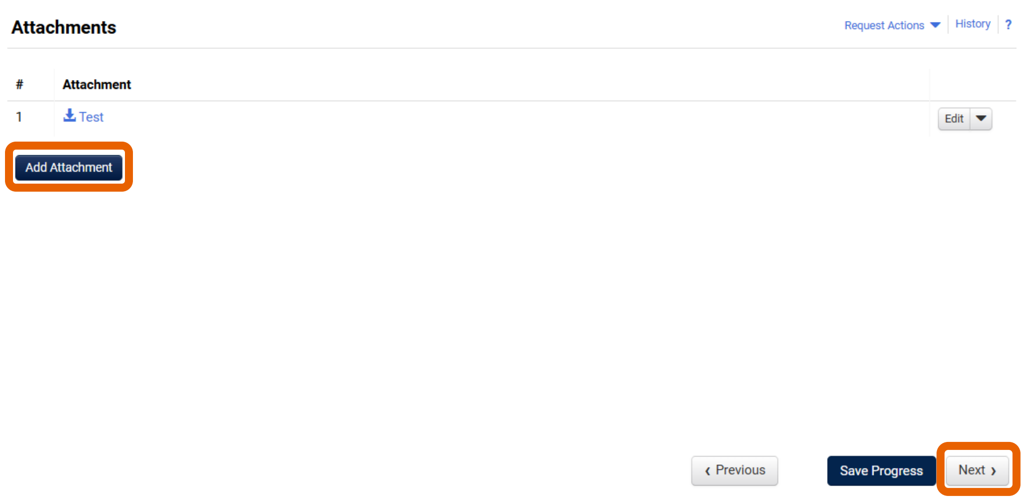
5. Select **Edit** to complete required fields for **Accounting Codes**. Select **Next**.



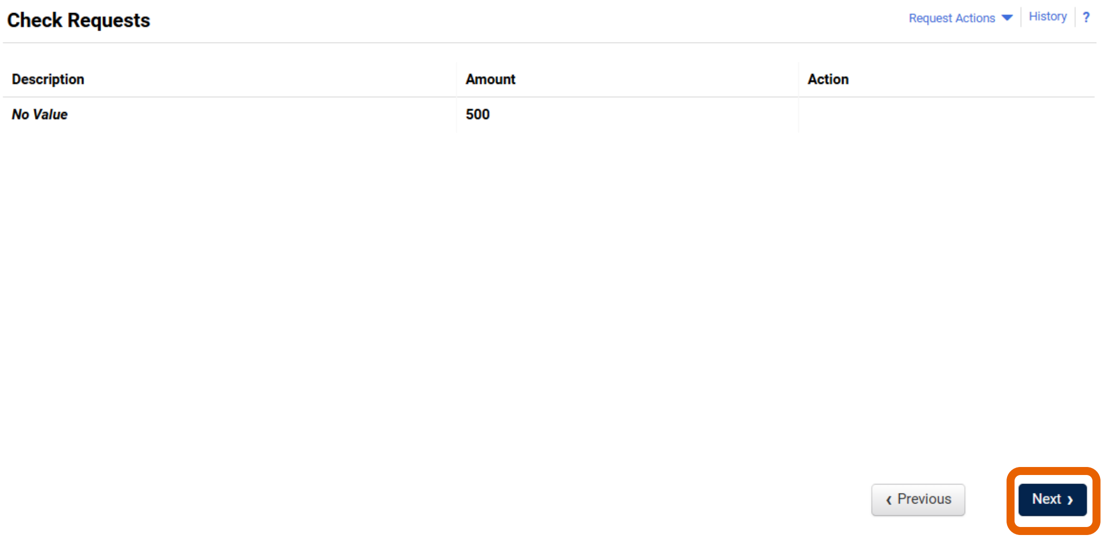
6. Fill in the necessary additional information. Select **Next**.



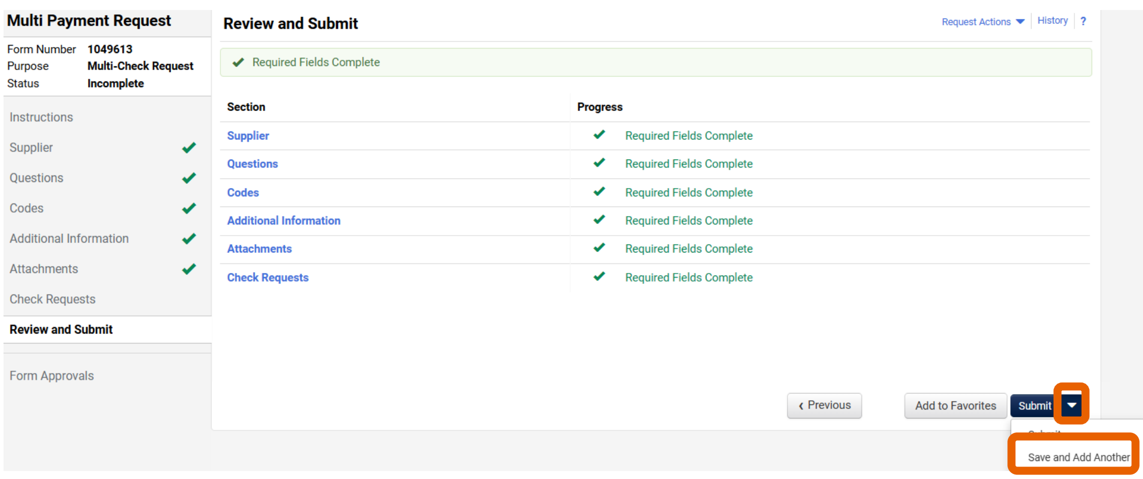
7. Upload the required attachments/documentations. Select **Next**.



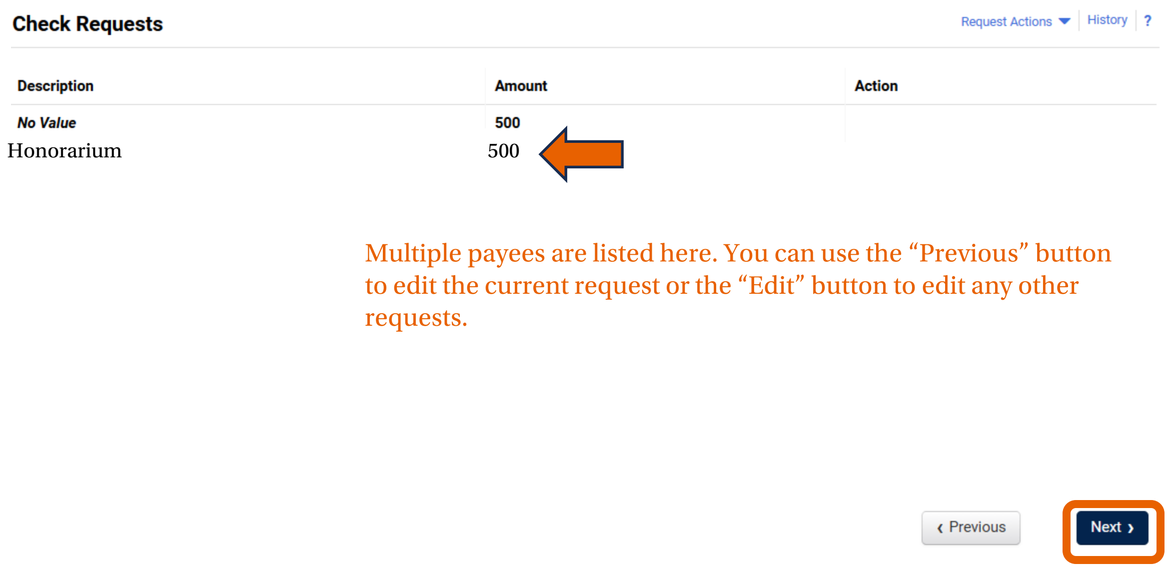
8. Verify the information is correct and select **Next**.



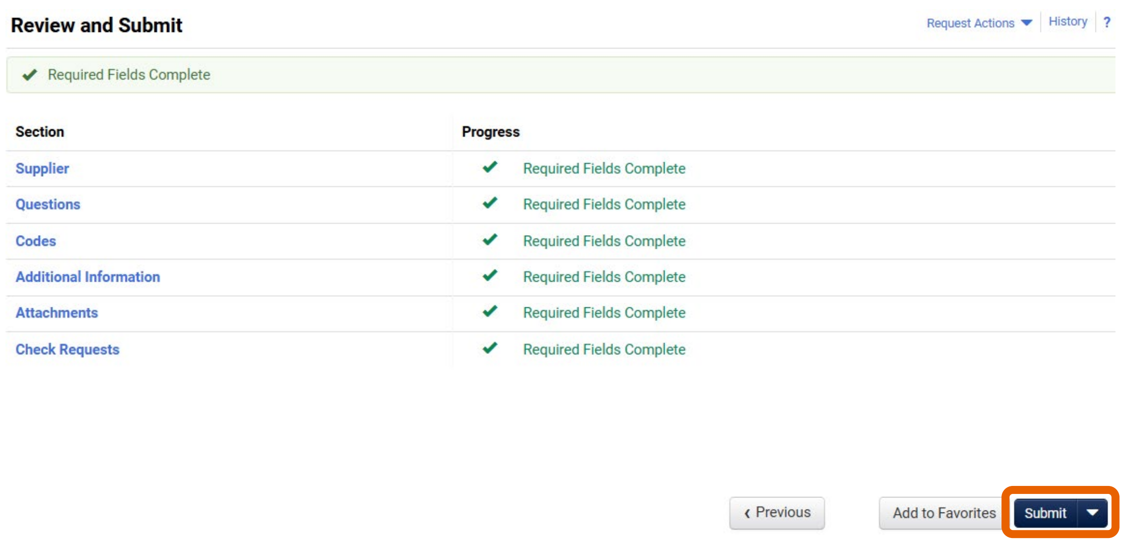
9. Confirm that all sections have been completed. Choose the dropdown arrow next to submit and select **Save and Add Another** to add the next request.



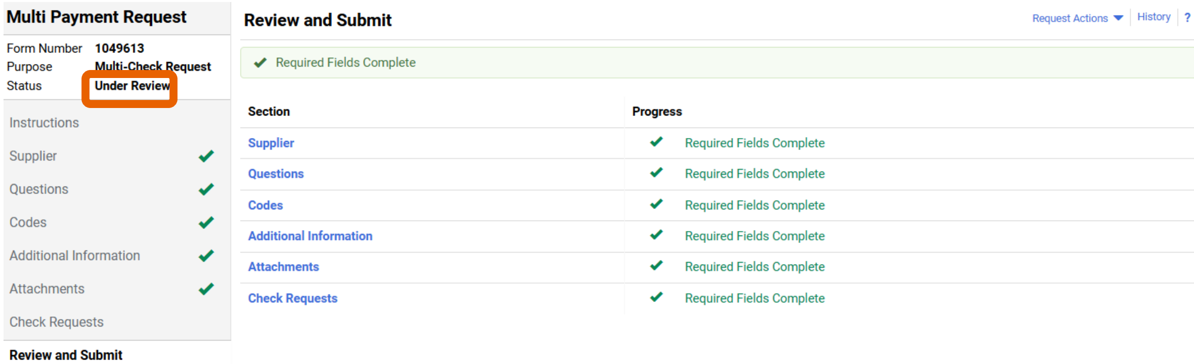
10. You will now be at the beginning screen and can add your next payee using the same instructions above. Once you get to the **Check Request** section, you will see the requests listed individually. Select **Next** and **Save** to submit or **Save and Add Another** until all payees have been added.



11. Once all payees have been added and all sections are complete, select **Submit**.



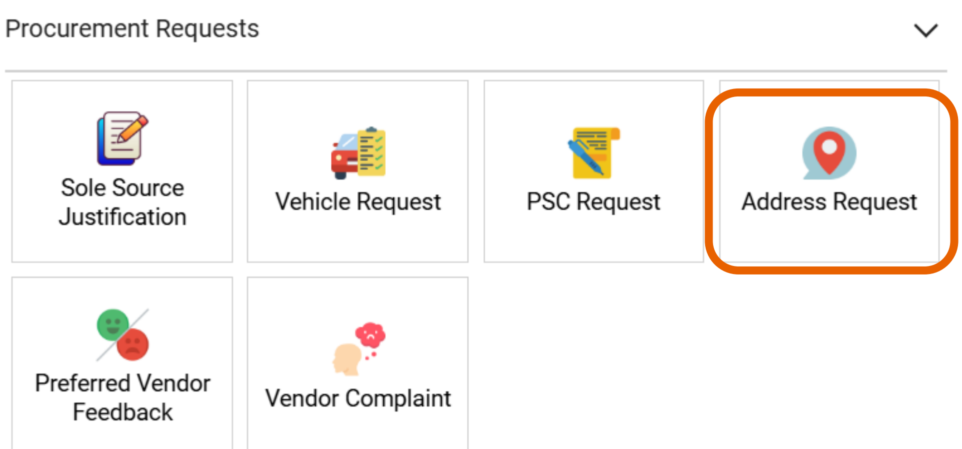
12. Check requests will then be **Under Review**. This means it is now awaiting approval for a PBS auditor to be paid.



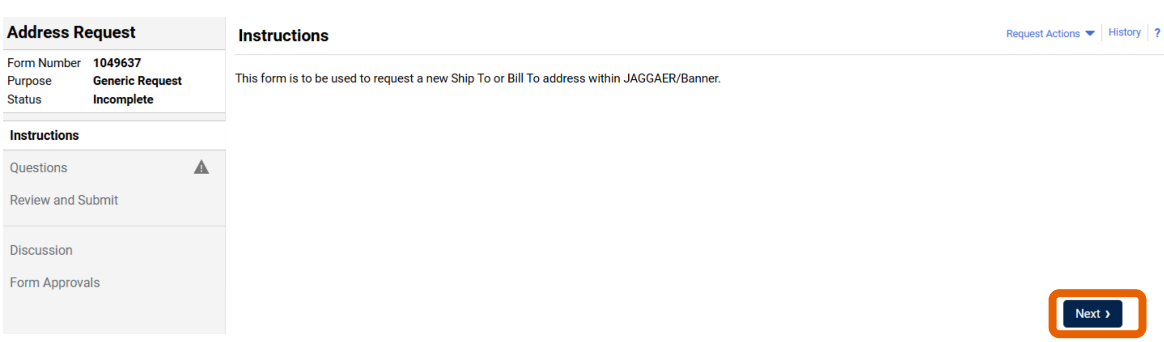
7.6 Creating a New Address

This form will be used to request a new **Ship To** or **Bill To** address within TigerBuy and Banner.

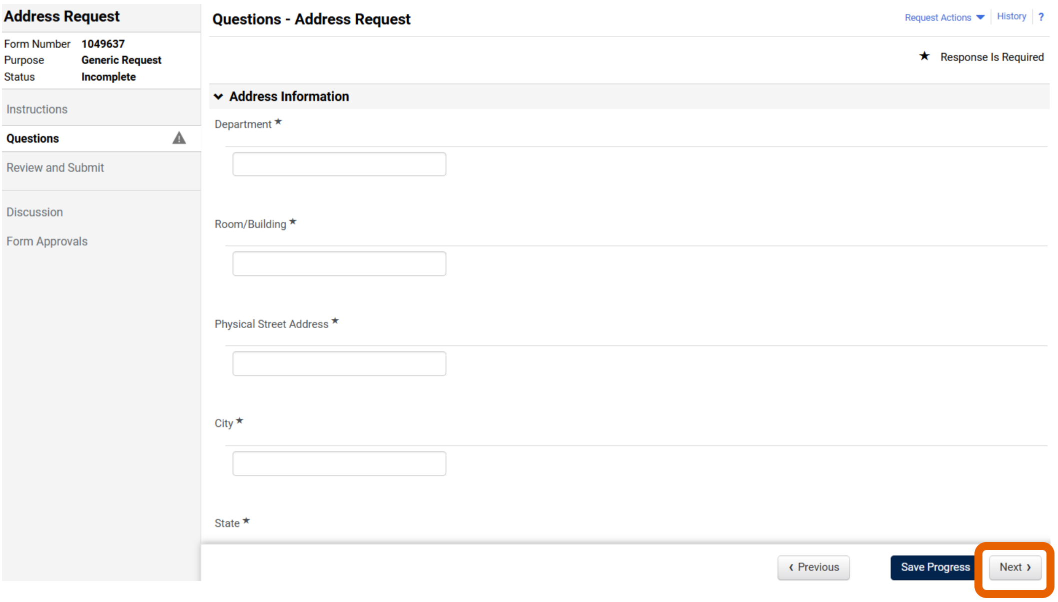
1. From the **Shopping Homepage**, select the **Address Request** icon in the **Procurement Services Forms** section.



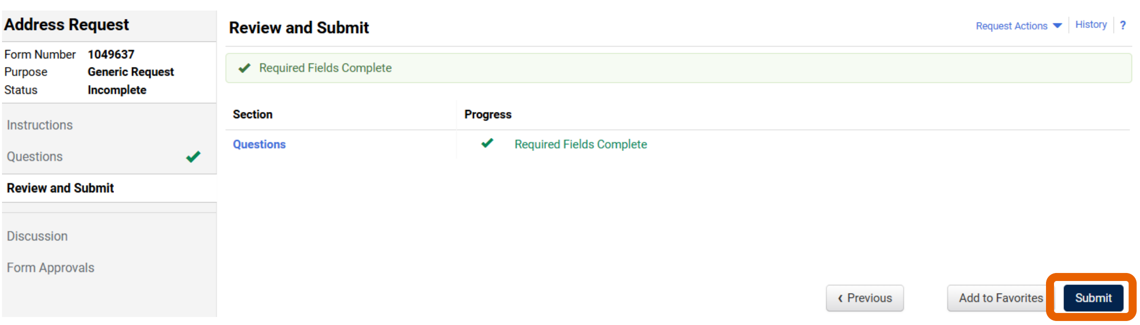
2. The **Address Request** form will appear. Read the instructions carefully and select **Next**.



3. Enter the new address in the required fields and select **Next**.



4. Once confirmed that all required fields are complete, select **Submit**.

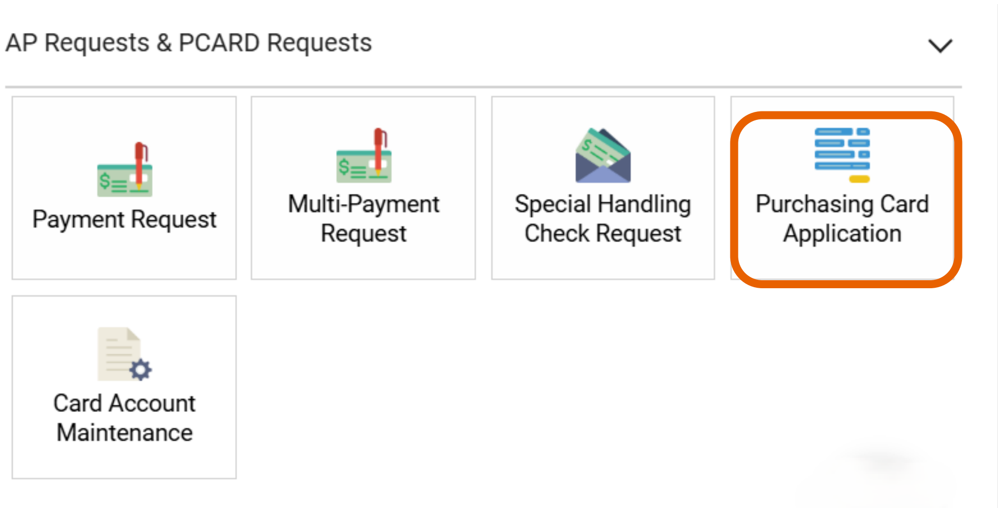


5. Once you confirm your request has been submitted, it will be **Under Review**.

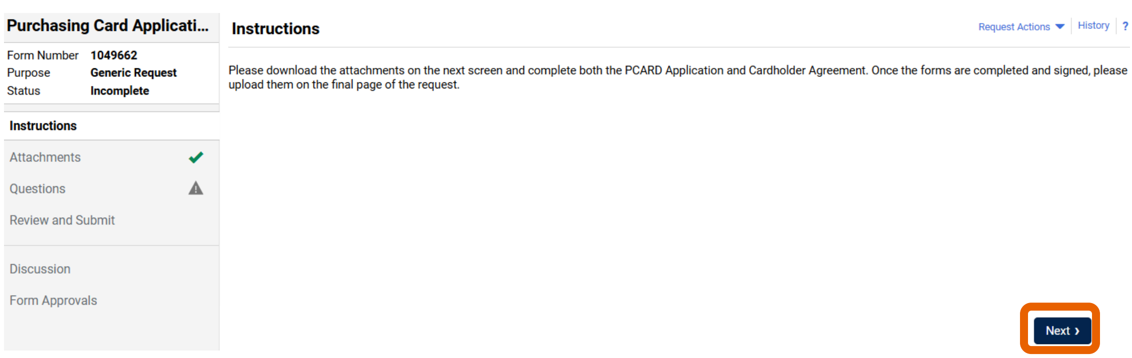
7.7 Completing a Purchasing Card Application

Auburn University's Purchasing Card program facilitates the procurement, payment, and reconciliation of allowable goods and services valued at less than $5,000 or the amount less than your single transaction limit. Please use the following instructions to request your AU purchasing card.

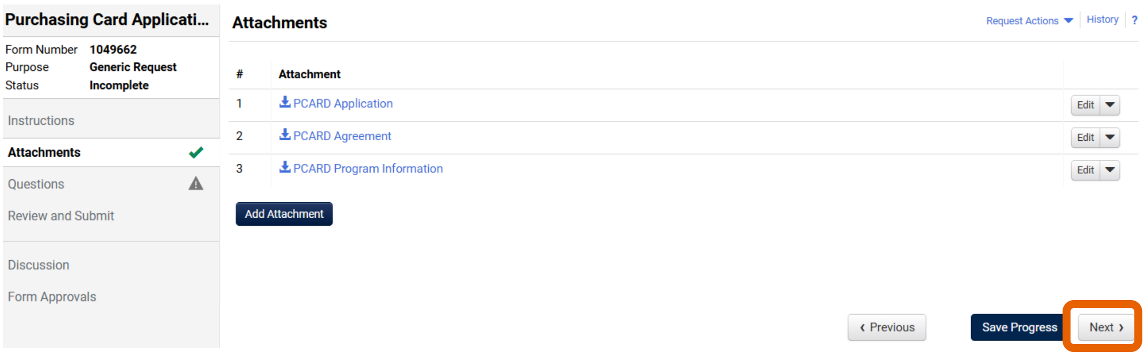
1. From the **Shopping Homepage**, select the **Purchasing Card Application** icon in the **Purchasing Card Forms** section.



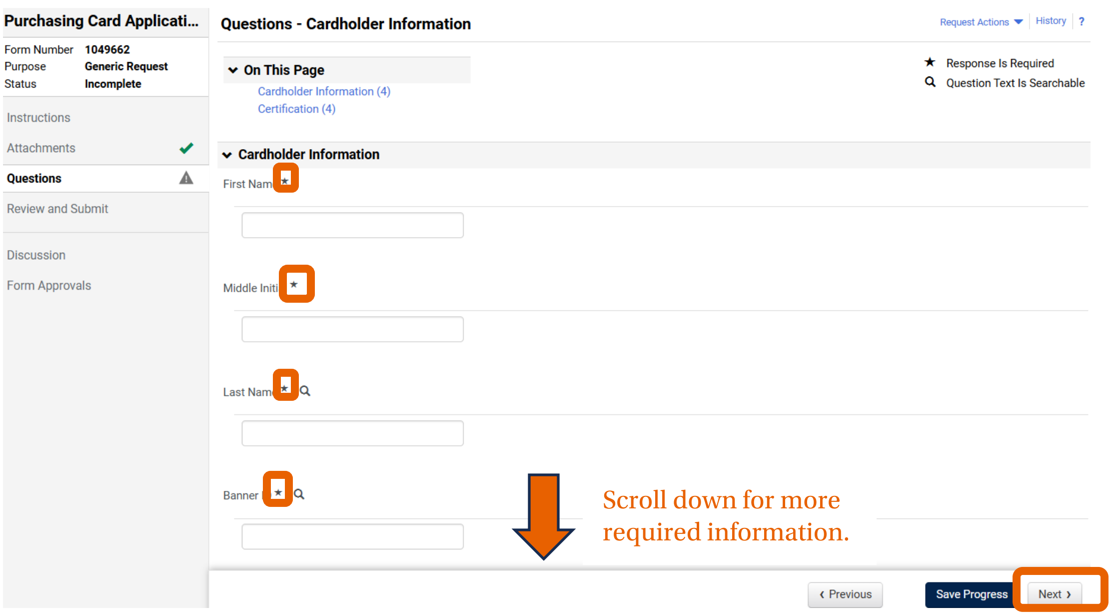
2. The **Purchasing Card Application** form will appear. Read the instructions carefully and select **Next**.



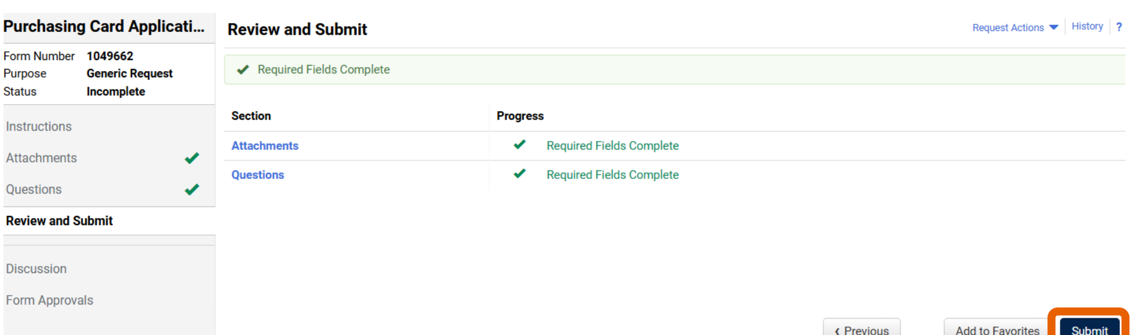
3. Download and complete each form. They will be uploaded in the final page of the request. Select **Next**.



4. Fill in the cardholder information. Required fields are marked with a star. Scroll to upload your approved/signed/completed application and signed cardholder agreement. Select **Next**.



5. Confirm all sections are complete. Select **Submit**.

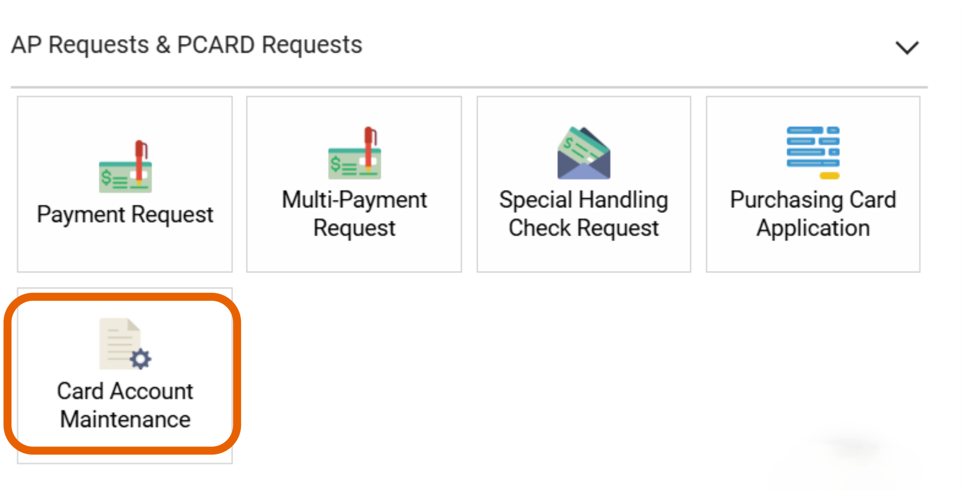


6. Once your application has been approved and your card has been ordered, please allow 5-7 business days for the card to be received by PBS.

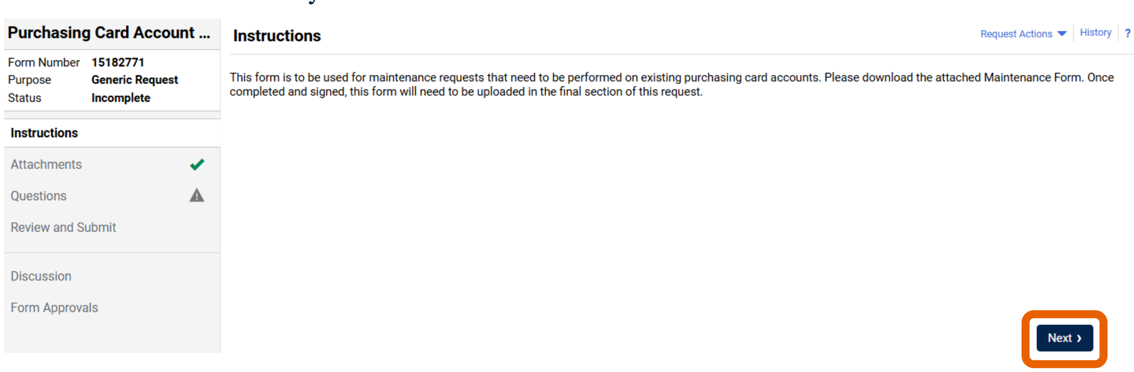
7.8 Maintaining your Purchasing Card

Users can request changes for their purchasing card by using this form. These changes would include account closure, name, address change, credit limit increase, department, and transaction limit.

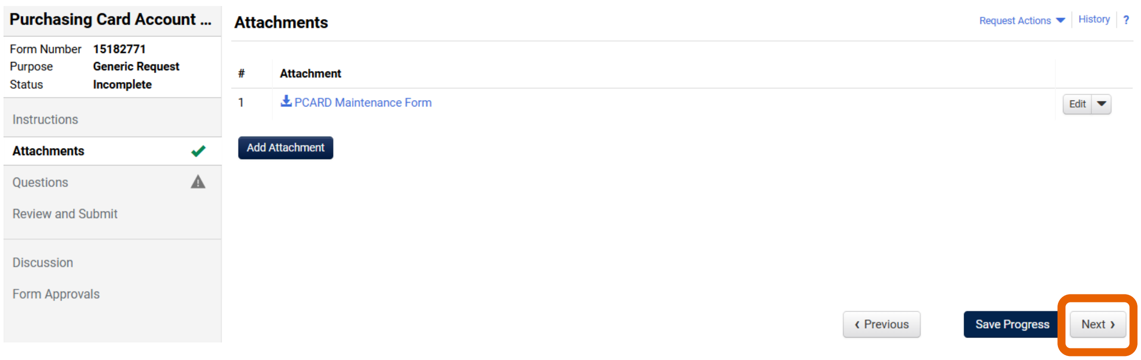
1. From the **Shopping Homepage**, select **Purchasing Card Account Maintenance** icon in the **Purchasing Card Forms** section.



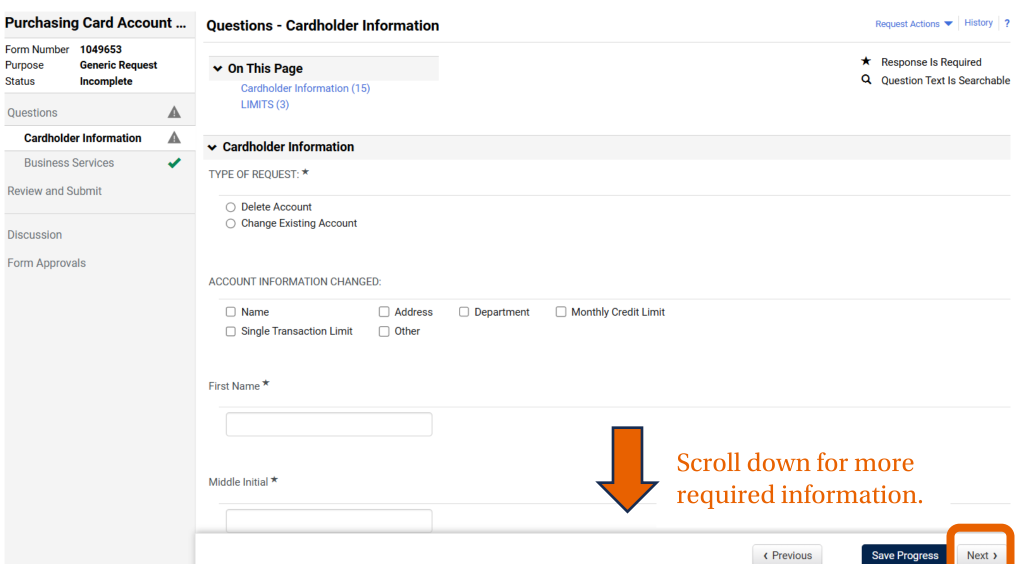
2. The **Purchasing Card Account Maintenance** form will appear. Read the instructions carefully and select **Next**.



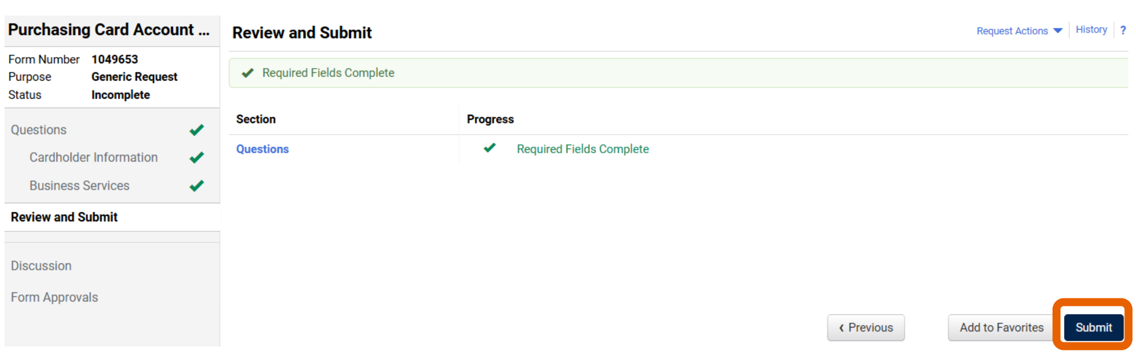
3. Download and complete the maintenance form. They will be uploaded in the final page of the request. Select **Next**.



4. Fill in the cardholder information. Required fields are marked with a star. Scroll upload your approved/signed/completed maintenance form. Select **Next**.



5. Once all sections are complete, select **Submit**.



6. Requests are then submitted to PBS for review.

Auburn University
TigerBuy

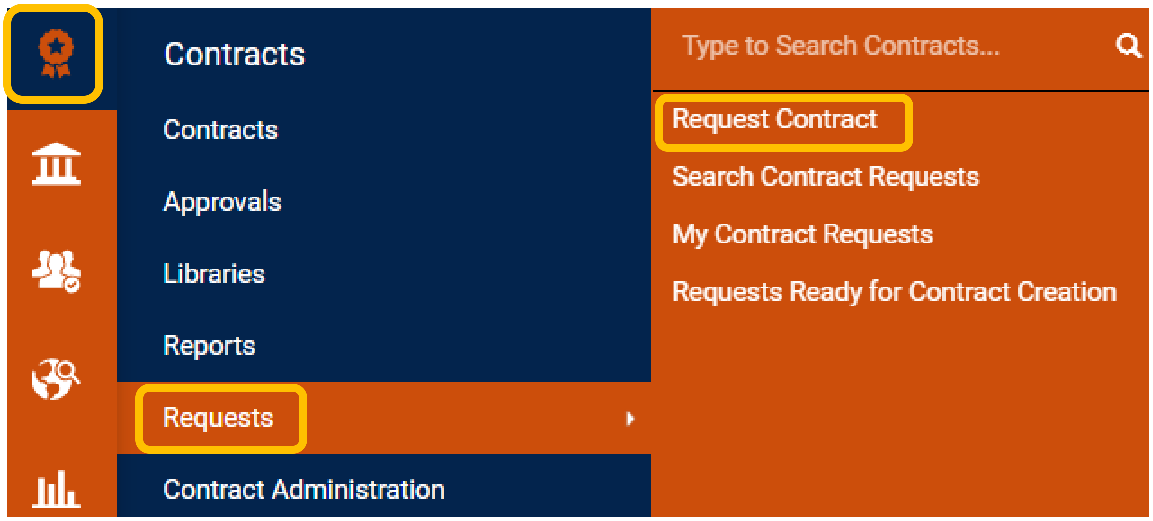
Module 8: Contracts

8.0 Requesting a New Contract

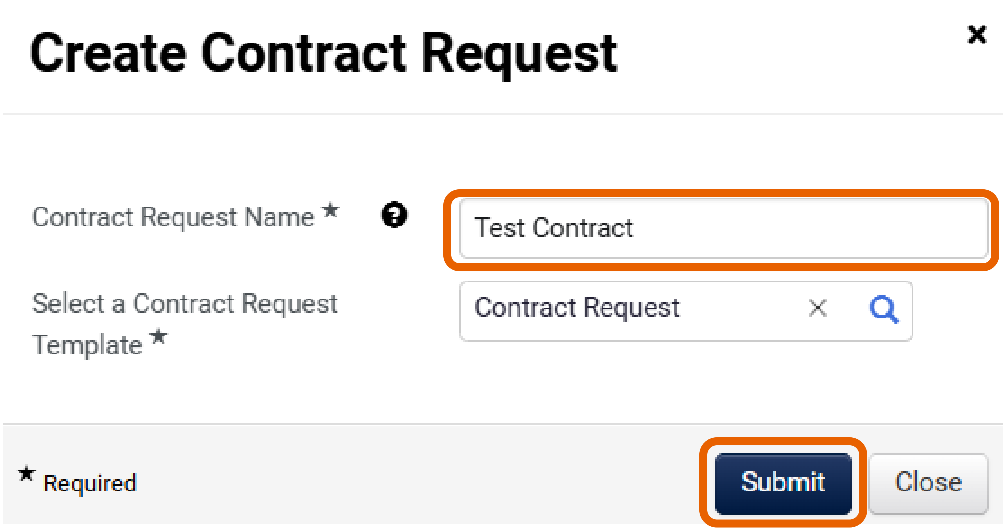
Target Audience: **Requisitioner**

Auburn University users should utilize the **Contract** component of TigerBuy to initiate the review and execution of supplier contracts (including Professional Services Contracts). Once executed, the **Contract** component becomes a searchable repository, capable of providing university stakeholders with reminders of critical deadlines related to each contract.

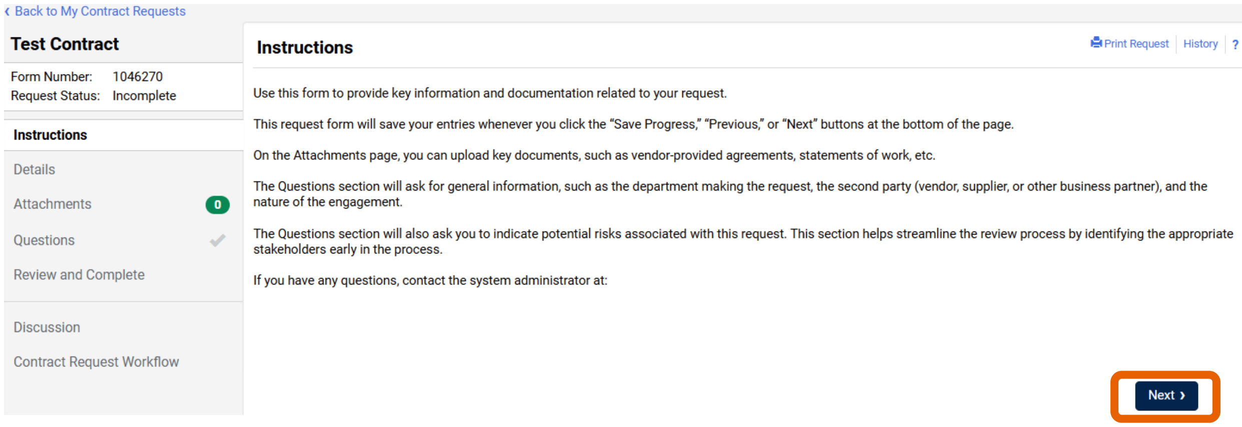
1. To request a new contract, from the **Navigation Menu**, select **Contracts, Requests, and Request Contract.**



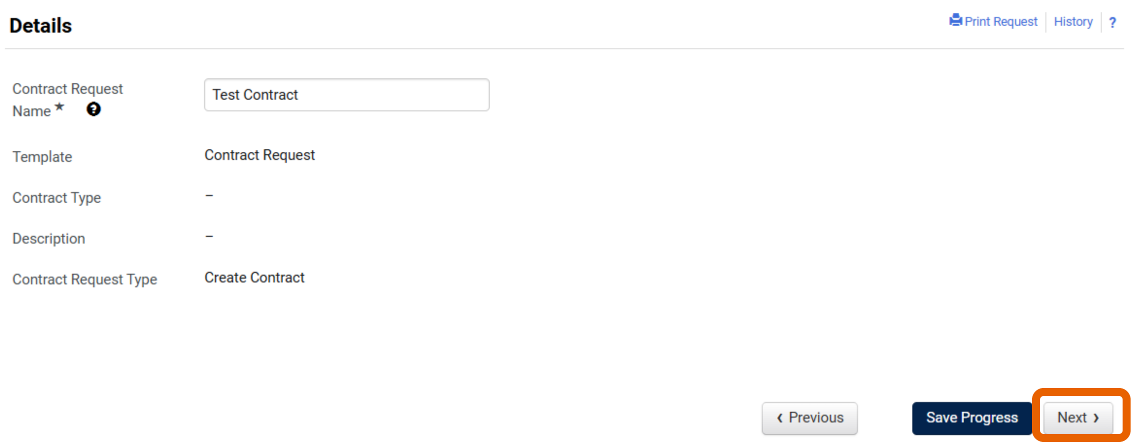
2. Complete the required information in the **Create Contract Request** box. The **Contract Request Name** is an internal label used by the requestor to identify each review request. Once you have named the contract, select **Next**. Note that the **Contract Request Field** should not be altered.



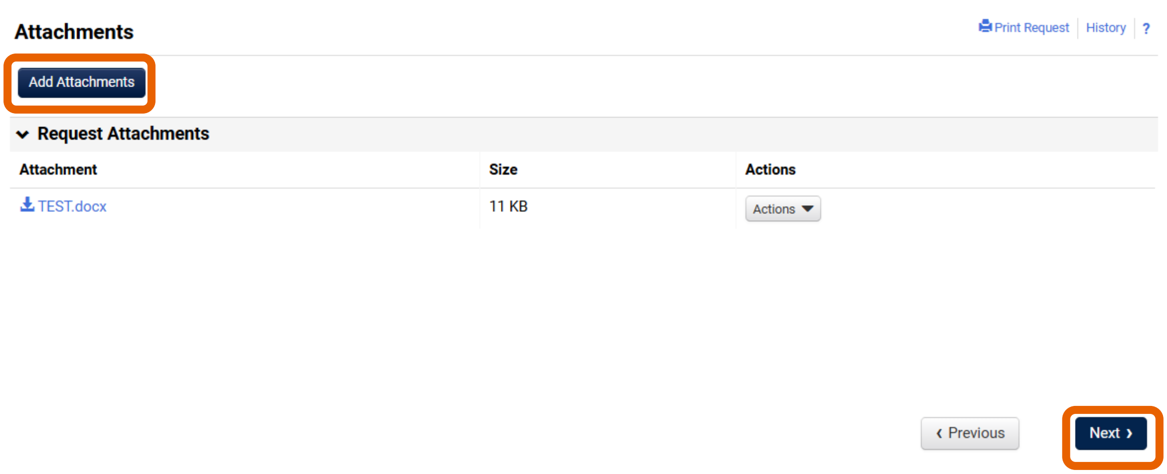
3. The **Contract Request** form will appear. Read the instructions carefully and select **Next**.



4. The **Details** page will appear. The name you created previously will auto populate. Select **Next**.



5. In the **Attachments** field, add any documentation provided by the supplier, such as their contract or terms and conditions. If the contract is over $5000, attach an Alabama Vendor Disclosure Statement. Select **Next**.



6. In **Questions-General Information**, populate the required information including:

   Contract Type: Choose the closest to the category needed. If you choose **PSC**, additional questions will appear in relation to the scope of service to be contracted.

   Department Information: All fields relating to the departmental contract requestor must be populated.

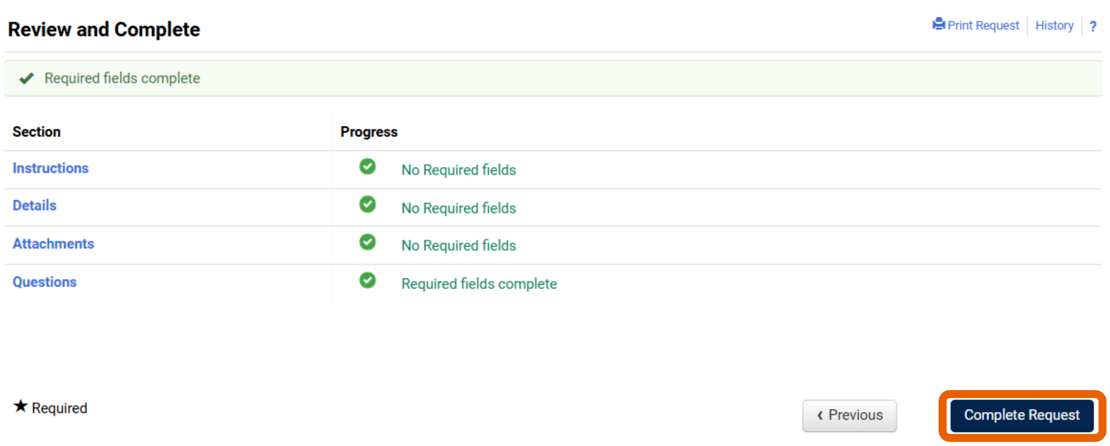
   Supplier/Contractor Information: Suppliers must be registered in Auburn's Supplier Portal in order to initiate a contract request. Type the name of the supplier into the searchable field to locate the correct registration. Add the name of the supplier's contact you are currently working with, along with their email address (signature requests will be sent to this email address).

   Individual or Sole Proprietor: Only choose "**yes**" if the individual will be performing a professional service. If you choose "**yes**", additional questions will appear to determine whether the individual could be deemed an employee and to confirm the supplier can be treated as an independent contractor.

   Risk Management/Tax Compliance: If you have chosen **PSC**, additional questions will populate to route contract to Risk Management and/or Tax Compliance.

   Contract Information: Contract Name should reflect the title of the contract. The Summary requires a narrative overview of the contract, including the intentions and expectations of the parties in the agreement. The requestor should include any concerns, questions, or issues from the department's perspective that need to be addressed. The summary should be developed enough so that a uniformed third party could understand the basis of the contract. It will be returned if it is not developed enough. Start date is when services are to start. If it is immediately, choose **Update State Date Upon Execution**. End date is the date of contract expirations. If this is for a purchasing agreement, choose **No Expiration**. If you have chosen **PSC** as the contract type, there may be additional required questions. Once all sections are complete, select **Next**.

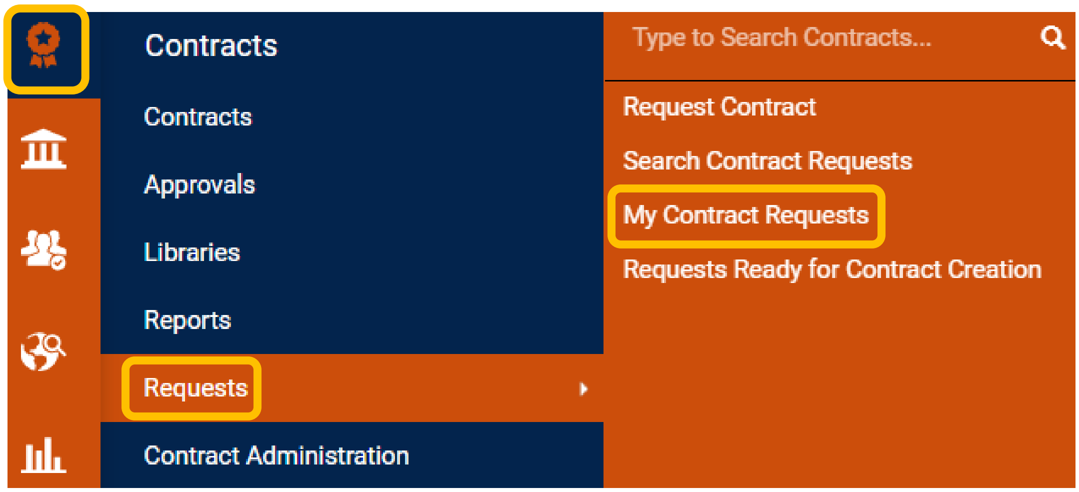
7. Confirm all sections are complete. Select **Complete Request**.



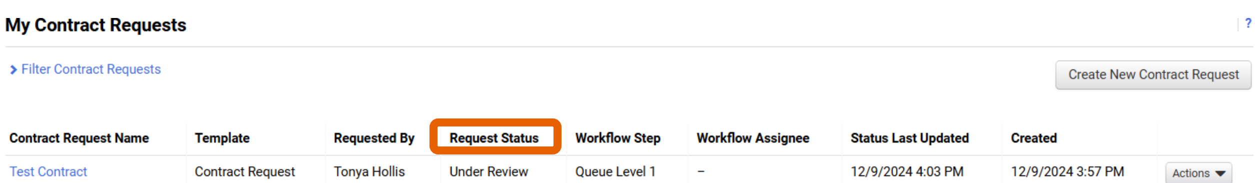
8.1 Viewing Your Contract Requests

Target Audience: **Requisitioner**

1. To view the status of your requests, select **Contracts, Requests**, then **My Contract Requests.**



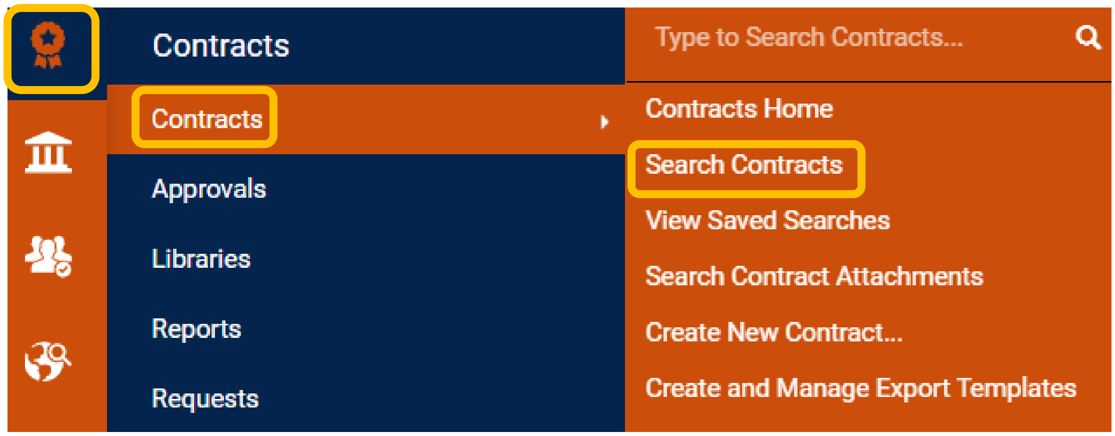
2. You will be able to view your requests and see the current status. Once the contract is under review, it is no longer able to be edited. To view the contract, select the name to open or select **View** in the action dropdown.



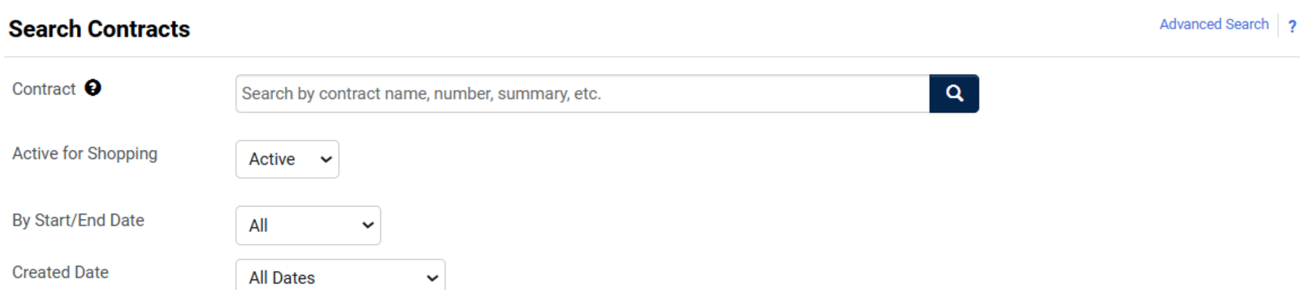
8.2 Searching Contract Requests

Target Audience: **Requisitioner**

1. To search contract requests, select **Contracts, Contracts**, and **Search Contracts**.



2. From this screen, you have the ability to search for contracts based on specific criteria.



Auburn University
TigerBuy

Module 9:
Requisition/PO Inquiry
and
Change Requests

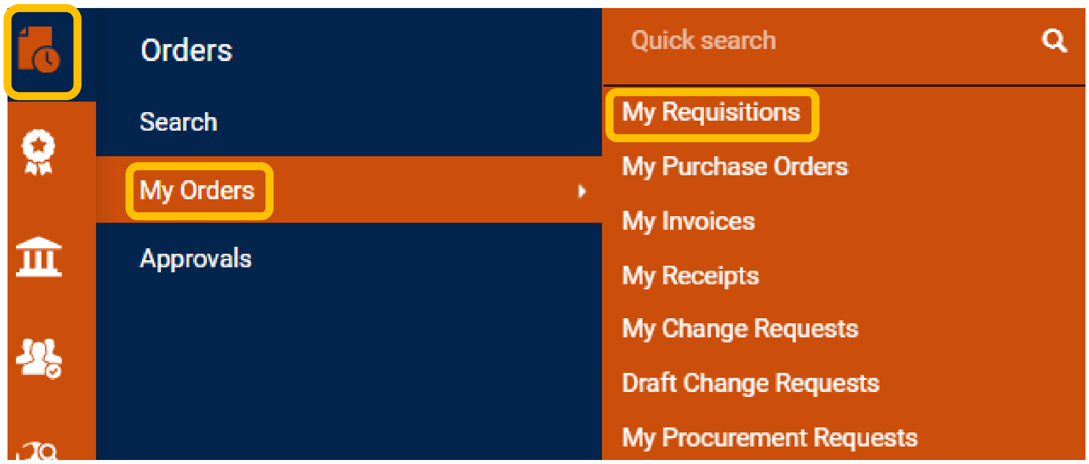
AUBURN UNIVERSITY
Procurement and Business Services

9.0 Viewing a Requisition

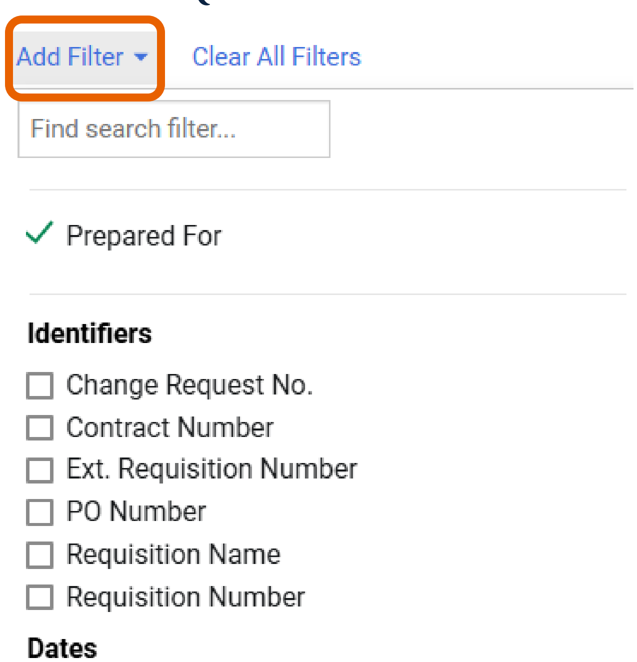
Target Audience: **All**

Submitted requisitions are all shown in **My Requisitions**. The progress of requisitions can easily be followed from this central place.

1. To view your requisitions, from the **Navigation Menu** select **Orders, My Orders**, and **My Requisitions**.



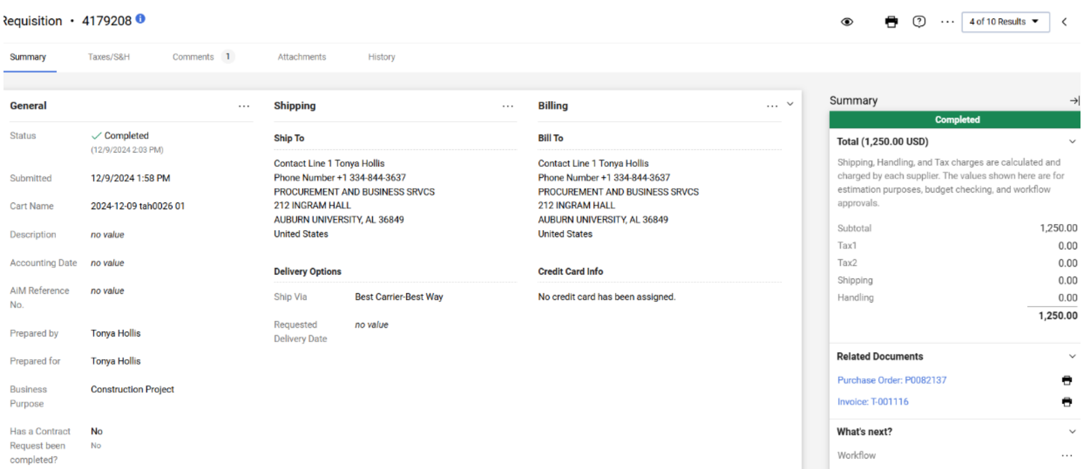
2. Requisitions can be filtered by many different options. Some of those include supplier, requisition status, department, and more. Select **Add Filter** to narrow down your search or use the **Quick Filters** on the left side of the screen.



3. Select the desired requisition that should be displayed.

	Requisition Number	Supplier	Requisition Name	Requisition Status	Prepared For	Submitted Date	Total Amount
☐	4182773	PBS Sourcing Supplier	2024-12-12 tah0026 01	Completed	Tonya Hollis	12/12/2024 11:21:30 AM	0.00 USD
☐	4179802	PBS Sourcing Supplier	2024-12-10 tah0026 03	Completed	Tonya Hollis	12/12/2024 11:19:21 AM	16,000.00 USD
☐	4179435	Wreck-It Ralph	Requisition Copy Cart	Pending	Tonya Hollis	12/10/2024 2:13:05 PM	1,250.00 USD
☐	4179208	Wreck-It Ralph	2024-12-09 tah0026 01	Completed	Tonya Hollis	12/9/2024 1:58:03 PM	1,250.00 USD
☐	4152751	Wreck-It Ralph	2024-10-31 pikemat 01	Completed	Tonya Hollis	10/31/2024 10:00:48 AM	5,497.50 USD
☐	4151482	Wreck-It Ralph	2024-10-30 pikemat 03	Completed	Tonya Hollis	10/30/2024 12:51:47 PM	5,497.50 USD
☐	4151364	Wreck-It Ralph	2024-10-30 pikemat 01	Completed	Tonya Hollis	10/30/2024 11:59:35 AM	5,497.50 USD
☐	4151187	Wreck-It Ralph	2024-10-30 tah0026 03	Completed	Tonya Hollis	10/30/2024 11:07:30 AM	5,497.50 USD
☐	4150875	Wreck-It Ralph	2024-10-30 tah0026 02	Completed	Tonya Hollis	10/30/2024 10:01:58 AM	5,497.50 USD
☐	4150828	Wreck-It Ralph	2024-10-30 tah0026 01	Completed	Tonya Hollis	10/30/2024 9:43:16 AM	5,497.50 USD

4. The requisition details will be shown.

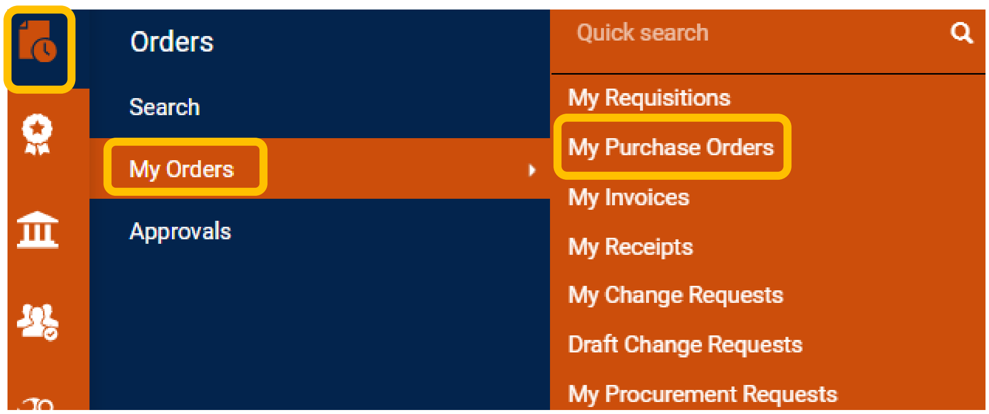


9.1 Viewing a Purchase Order (PO)

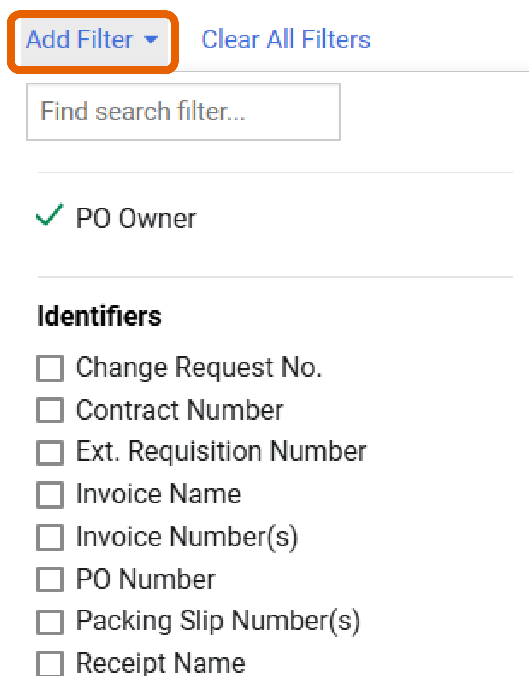
Target Audience: **All**

Submitted purchase orders are all shown in **My Purchase Orders**. The progress of a purchase order can easily be followed from this central place.

1. To view your purchase orders, form the **Navigation Menu** select **Orders, My Orders**, and **My Purchase Orders**.



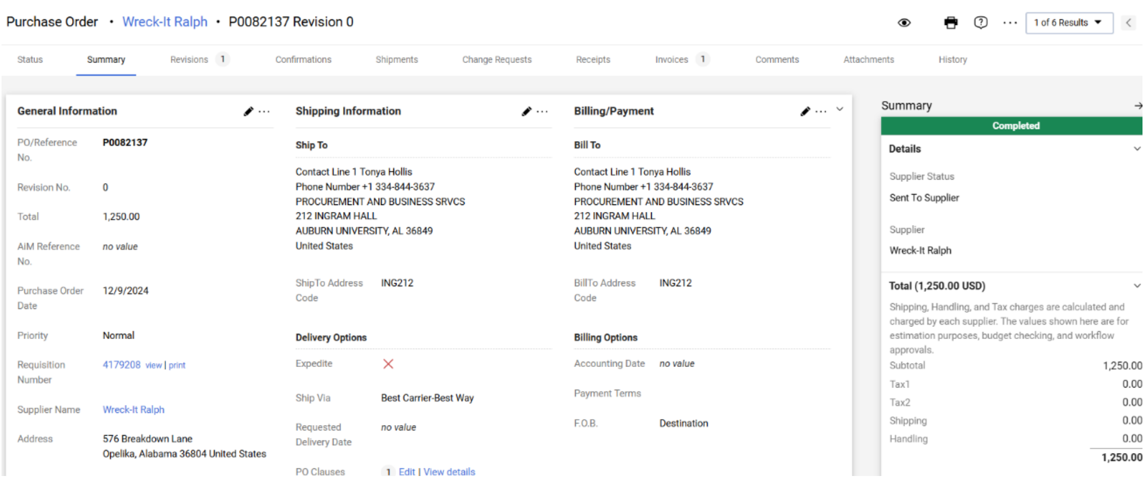
2. Purchase Orders can be filtered by many different options. Some of those include supplier, PO number, department, and more. Select **Add Filter** to narrow down your search or use the **Quick Filters** on the left side of the screen.



3. Select the desired purchase order that should be displayed.

PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Matching Status	Total Amount
P0082137	Wreck-It Ralph	12/9/2024 2:03:30 PM	Completed	4179208	Tonya Hollis	Sent To Supplier	No Matches	1,250.00 USD
P0082131	Wreck-It Ralph	10/31/2024 10:01:37 AM	Completed	4152751	Tonya Hollis	Sent To Supplier	Fully Matched	5,497.50 USD
J-0000631	Wreck-It Ralph	10/30/2024 4:01:09 PM	Completed	4151482	Tonya Hollis	Sent To Supplier	No Matches	5,497.50 USD
J-0000629	Wreck-It Ralph	10/30/2024 12:00:30 PM	Pending	4151364	Tonya Hollis	No Shipments	No Matches	5,497.50 USD
J-0000628	Wreck-It Ralph	10/30/2024 11:07:58 AM	Pending	4151187	Tonya Hollis	No Shipments	No Matches	5,497.50 USD
J-0000627	Wreck-It Ralph	10/30/2024 10:02:59 AM	Pending	4150875	Tonya Hollis	No Shipments	No Matches	5,497.50 USD

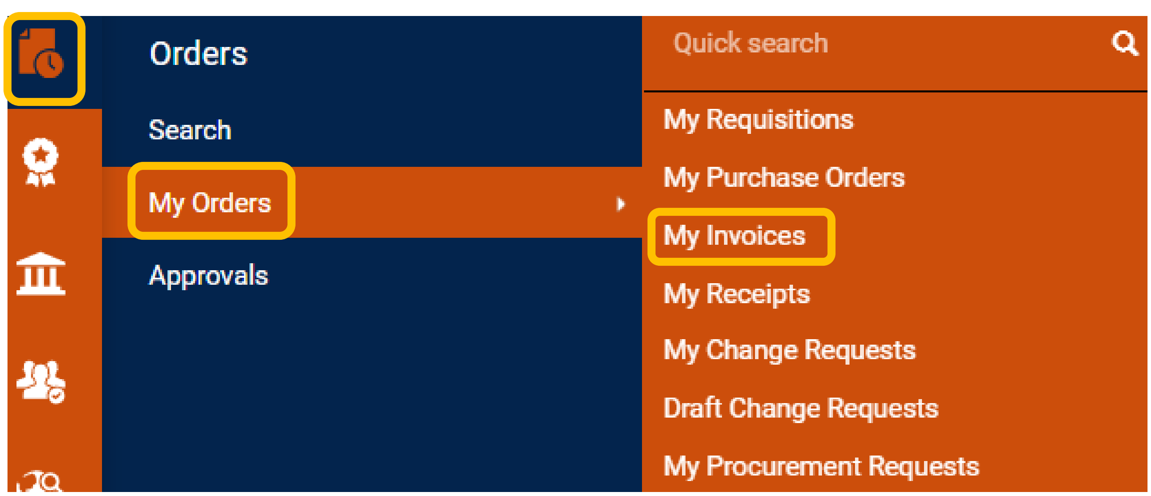
4. Purchase order details will be shown.



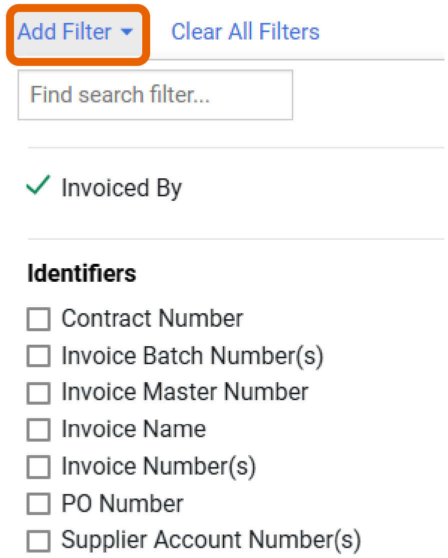
9.2 Viewing an Invoice

Target Audience: **Requisitioner**

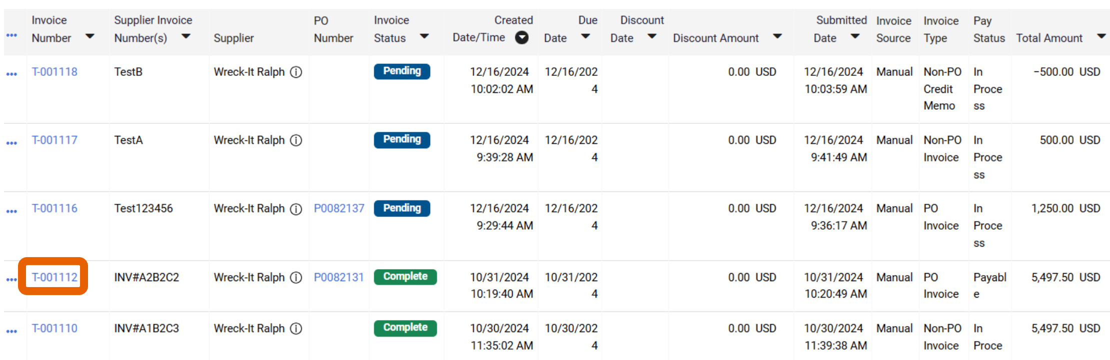
1. To view your invoices, from the **Navigation Menu** select **Orders, My Orders**, and **My Invoices.**



2. Invoices can be filtered by many different options. Some of those include payment status, PO number, invoice number, department, and more. Select **Add Filter** to narrow down your search or use the **Quick Filters** on the left side of the screen.

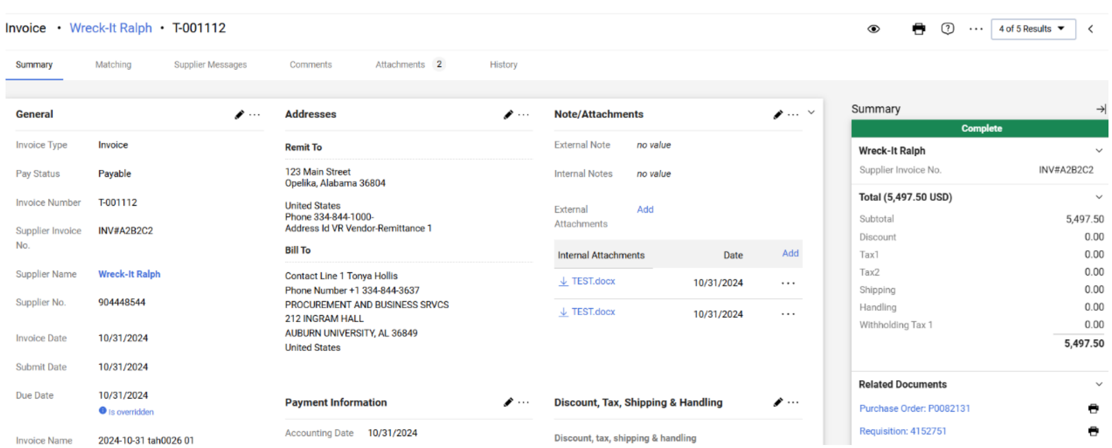


3. Select the desired invoice that should be displayed.



Invoice Number	Supplier Invoice Number(s)	Supplier	PO Number	Invoice Status	Created Date/Time	Due Date	Discount Date	Discount Amount	Submitted Date	Invoice Source	Invoice Type	Pay Status	Total Amount
T-001118	TestB	Wreck-It Ralph		Pending	12/16/2024 10:02:02 AM	12/16/2024		0.00 USD	12/16/2024 10:03:59 AM	Manual	Non-PO Credit Memo	In Process	-500.00 USD
T-001117	TestA	Wreck-It Ralph		Pending	12/16/2024 9:39:28 AM	12/16/2024		0.00 USD	12/16/2024 9:41:49 AM	Manual	Non-PO Invoice	In Process	500.00 USD
T-001116	Test123456	Wreck-It Ralph	P0082137	Pending	12/16/2024 9:29:44 AM	12/16/2024		0.00 USD	12/16/2024 9:36:17 AM	Manual	PO Invoice	In Process	1,250.00 USD
T-001112	INV#A2B2C2	Wreck-It Ralph	P0082131	Complete	10/31/2024 10:19:40 AM	10/31/2024		0.00 USD	10/31/2024 10:20:49 AM	Manual	PO Invoice	Payable	5,497.50 USD
T-001110	INV#A1B2C3	Wreck-It Ralph		Complete	10/30/2024 11:35:02 AM	10/30/2024		0.00 USD	10/30/2024 11:39:38 AM	Manual	Non-PO Invoice	In Process	5,497.50 USD

4. Invoice details will be shown



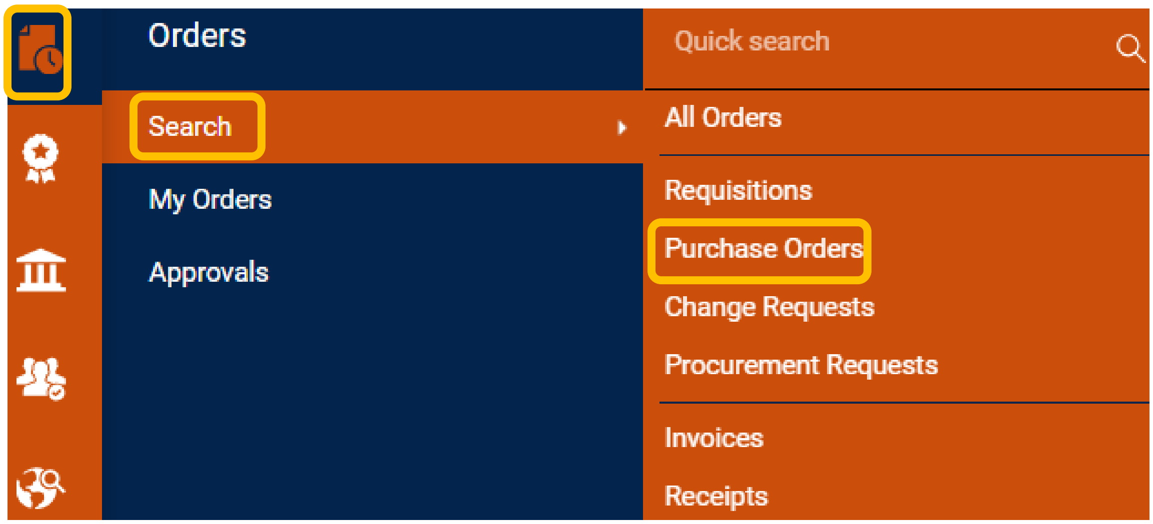
9.3 Submitting a Change Request

Target Audience: **Requisitioner**

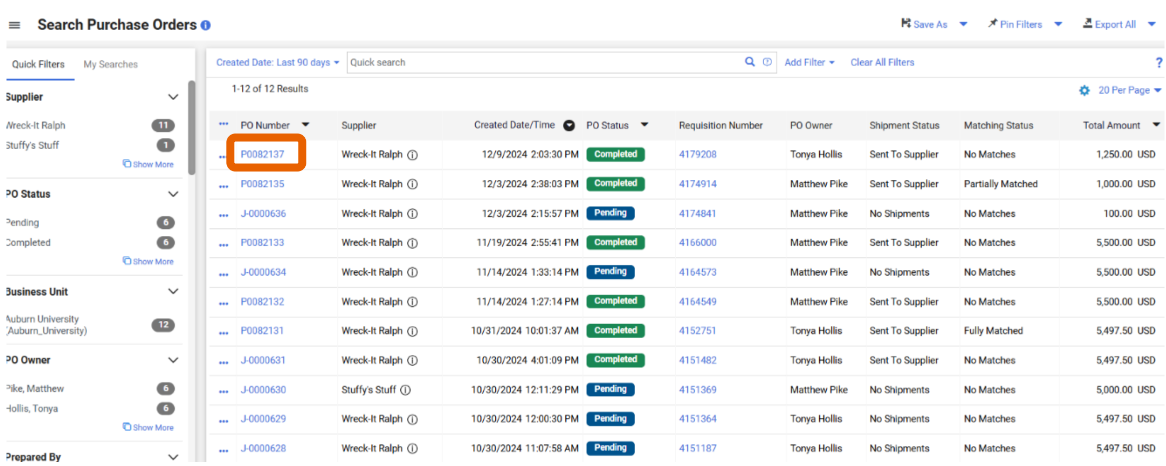
A Change Order should be submitted to request changes for purchase orders. These changes may include canceling lines, increasing amounts, and changing account codes. Accounting code changes consider previous invoice activity, complexity of accounting code on the original purchase, and the impact of issuing a new purchase order.

NOTE: A change request cannot be submitted against a punchout order through TigerBuy.

1. Locate the PO that needs a change by navigating through the menu on the left-hand side: **Orders- Search- Purchase Orders**.

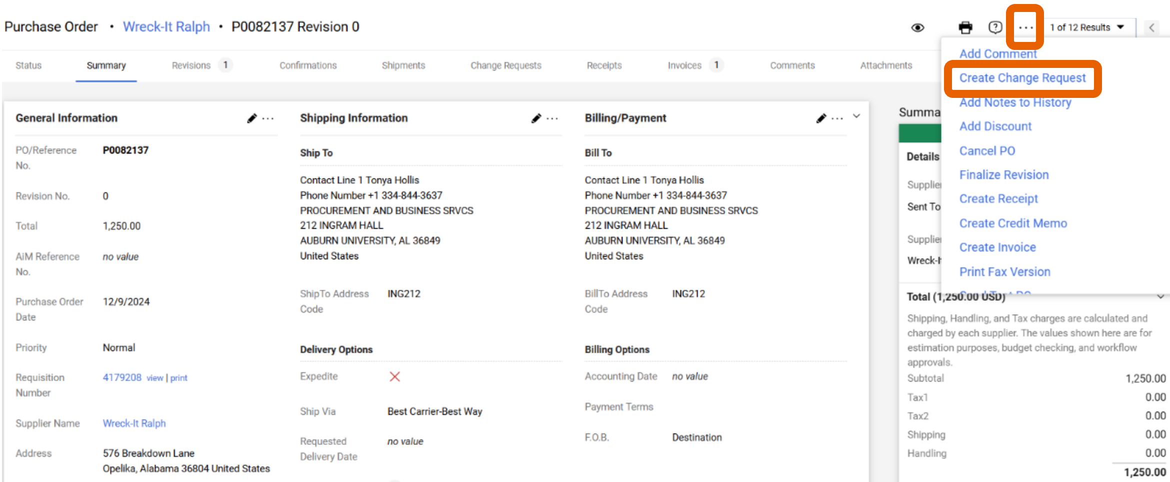


2. Locate the PO you need to change and select to open.

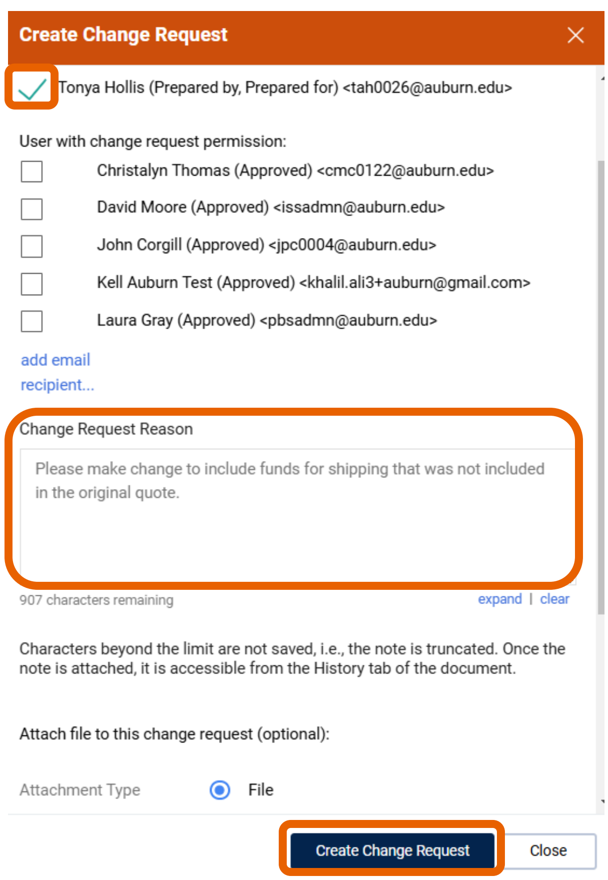


PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Matching Status	Total Amount
P0082137	Wreck-It Ralph	12/9/2024 2:03:30 PM	Completed	4179208	Tonya Hollis	Sent To Supplier	No Matches	1,250.00 USD
P0082135	Wreck-It Ralph	12/3/2024 2:38:03 PM	Completed	4174914	Matthew Pike	Sent To Supplier	Partially Matched	1,000.00 USD
J-0000636	Wreck-It Ralph	12/3/2024 2:15:57 PM	Pending	4174841	Matthew Pike	No Shipments	No Matches	100.00 USD
P0082133	Wreck-It Ralph	11/19/2024 2:55:41 PM	Completed	4166000	Matthew Pike	Sent To Supplier	No Matches	5,500.00 USD
J-0000634	Wreck-It Ralph	11/14/2024 1:33:14 PM	Pending	4164573	Matthew Pike	No Shipments	No Matches	5,500.00 USD
P0082132	Wreck-It Ralph	11/14/2024 1:27:14 PM	Completed	4164549	Matthew Pike	Sent To Supplier	No Matches	5,500.00 USD
P0082131	Wreck-It Ralph	10/31/2024 10:01:37 AM	Completed	4152751	Tonya Hollis	Sent To Supplier	Fully Matched	5,497.50 USD
J-0000631	Wreck-It Ralph	10/30/2024 4:01:09 PM	Completed	4151482	Tonya Hollis	Sent To Supplier	No Matches	5,497.50 USD
J-0000630	Stuffy's Stuff	10/30/2024 12:11:29 PM	Pending	4151369	Matthew Pike	No Shipments	No Matches	5,000.00 USD
J-0000629	Wreck-It Ralph	10/30/2024 12:00:30 PM	Pending	4151364	Tonya Hollis	No Shipments	No Matches	5,497.50 USD
J-0000628	Wreck-It Ralph	10/30/2024 11:07:58 AM	Pending	4151187	Tonya Hollis	No Shipments	No Matches	5,497.50 USD

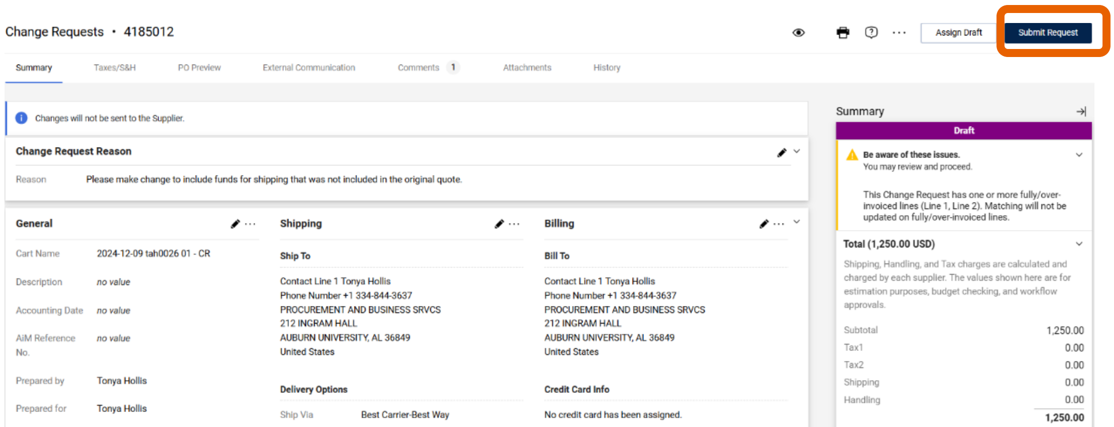
3. Initiate a **Change Order Request** from a completed PO by selecting **Create Change Request** from the dropdown menu next to the PO number (It is also available on the menu across the top).



4. **Create Change Request** box will appear. Read the instructions carefully and complete the required fields. Select users you want to notify of the change. **Please do not include Procurement, as change requests may route to them to review/approve.** Add a detailed note of what is being changed in the comments box that is presented and upload any documentation you have.

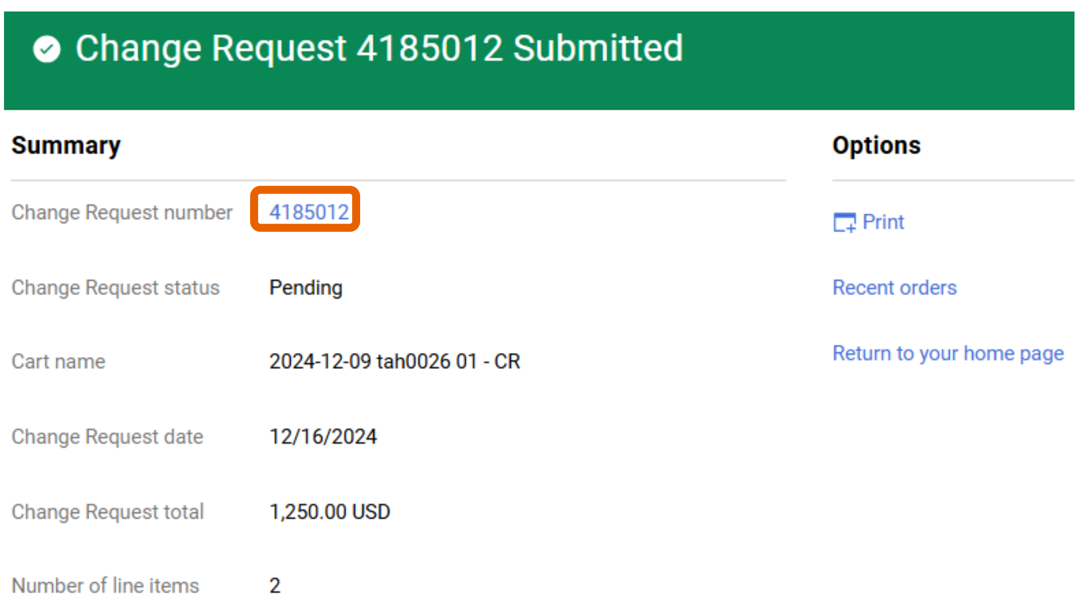


5. Next, make any necessary changes to the PO using the pencil button to edit each section that you need. This includes shipping/billing information, accounting codes, and more. Once changes have been made, select **Submit Request** in the top right corner.



Please Note: When submitting a change request to add funds to a line item, the additional amount **MUST** be added to the original amount of the line item from when the encumbrance was created. Failure to add the additional amount to the original amount will result in decreasing the encumbrance in Banner.

6. A change request confirmation will appear. You can select the Change Request number to view details of the change.

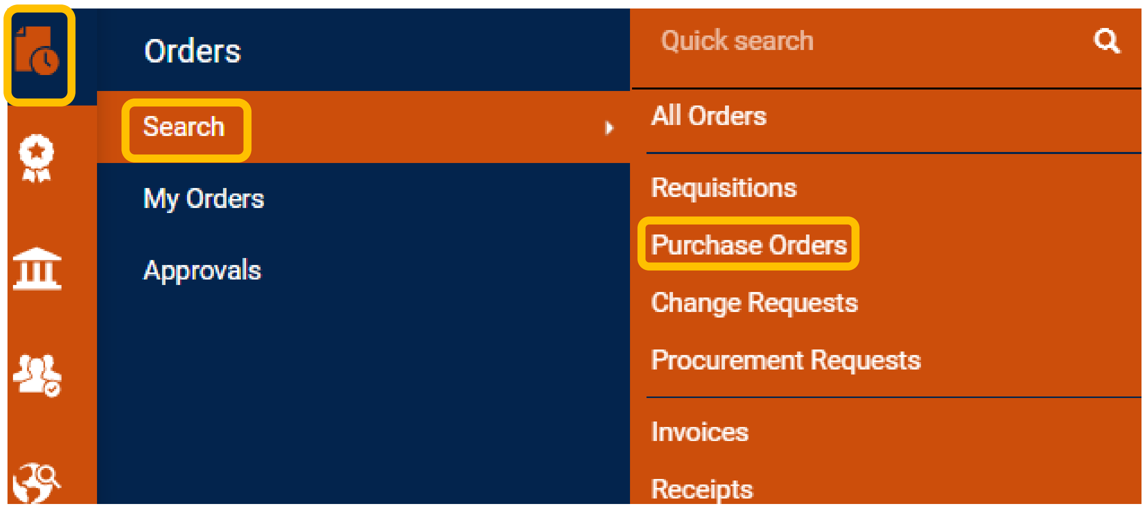


9.4 Requesting a Change to Bring PO Balance to $0

Target Audience: **Requisitioner**

Occasionally, a PO will need to be closed that still has money encumbered, but no more invoices will be submitted. The PO will need to be changed to a zero-dollar balance and the AP status will need to be changed to a closed status.

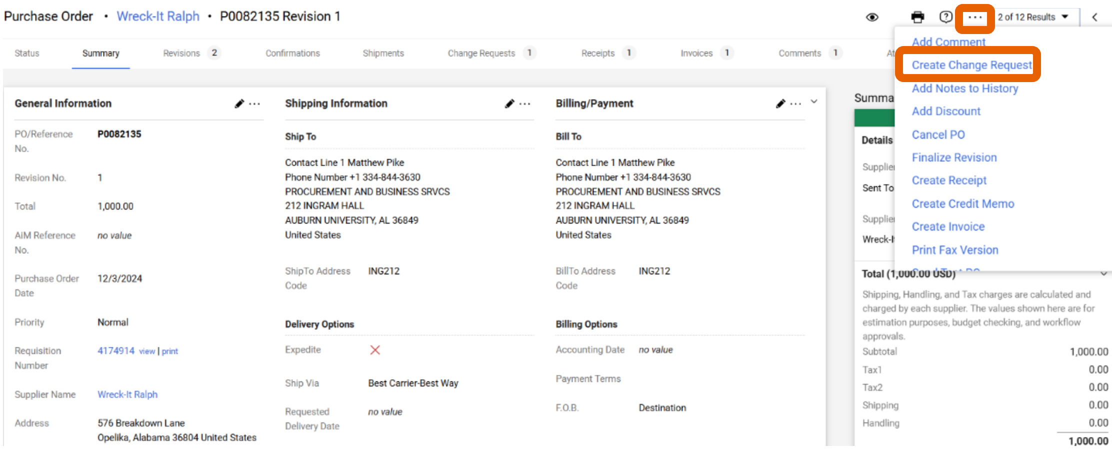
1. Locate the PO that needs to be closed by navigating through the menu on the left-hand side: **Orders- Search- Purchase Orders**.



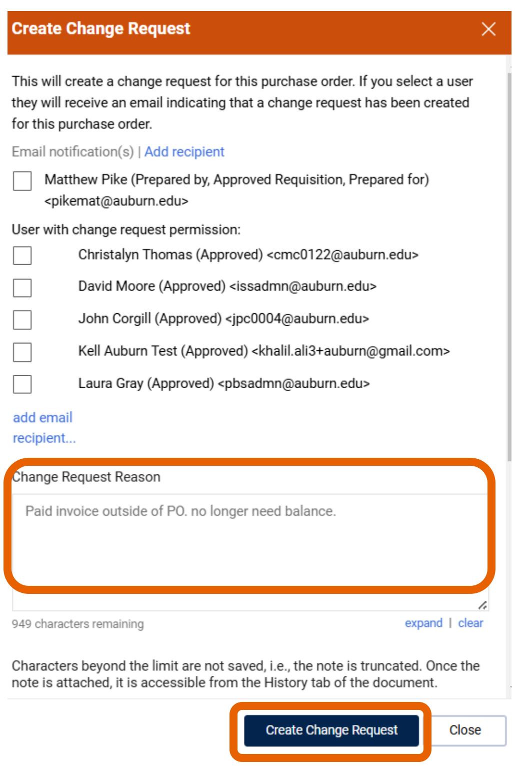
2. Locate the PO you need to change and select to open.

PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Matching Status	Total Amount
P0082137	Wreck-It Ralph	12/9/2024 2:03:30 PM	Completed	4179208	Tonya Hollis	Sent To Supplier	No Matches	1,250.00 USD
P0082135	Wreck-It Ralph	12/3/2024 2:38:03 PM	Completed	4174914	Matthew Pike	Sent To Supplier	Partially Matched	1,000.00 USD
J-0000636	Wreck-It Ralph	12/3/2024 2:15:57 PM	Pending	4174841	Matthew Pike	No Shipments	No Matches	100.00 USD
P0082133	Wreck-It Ralph	11/19/2024 2:55:41 PM	Completed	4166000	Matthew Pike	Sent To Supplier	No Matches	5,500.00 USD
J-0000634	Wreck-It Ralph	11/14/2024 1:33:14 PM	Pending	4164573	Matthew Pike	No Shipments	No Matches	5,500.00 USD
P0082132	Wreck-It Ralph	11/14/2024 1:27:14 PM	Completed	4164549	Matthew Pike	Sent To Supplier	No Matches	5,500.00 USD
P0082131	Wreck-It Ralph	10/31/2024 10:01:37 AM	Completed	4152751	Tonya Hollis	Sent To Supplier	Fully Matched	5,497.50 USD
J-0000631	Wreck-It Ralph	10/30/2024 4:01:09 PM	Completed	4151482	Tonya Hollis	Sent To Supplier	No Matches	5,497.50 USD
J-0000630	Stuffy's Stuff	10/30/2024 12:11:29 PM	Pending	4151369	Matthew Pike	No Shipments	No Matches	5,000.00 USD
J-0000629	Wreck-It Ralph	10/30/2024 12:00:30 PM	Pending	4151364	Tonya Hollis	No Shipments	No Matches	5,497.50 USD
J-0000628	Wreck-It Ralph	10/30/2024 11:07:58 AM	Pending	4151187	Tonya Hollis	No Shipments	No Matches	5,497.50 USD
J-0000627	Wreck-It Ralph	10/30/2024 10:02:59 AM	Pending	4150875	Tonya Hollis	No Shipments	No Matches	5,497.50 USD

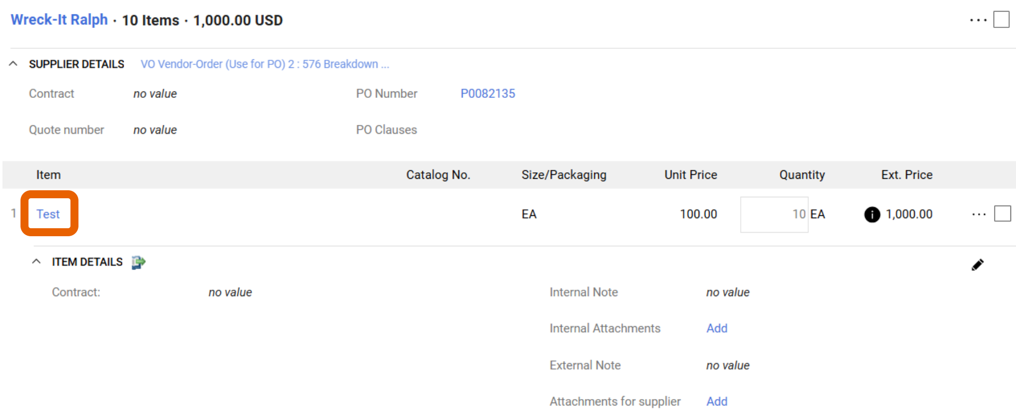
3. Initiate a **Change Order Request** form from a completed PO by selecting **Create Change Request** from the dropdown menu next to the PO number (It is also available on the menu across the top).



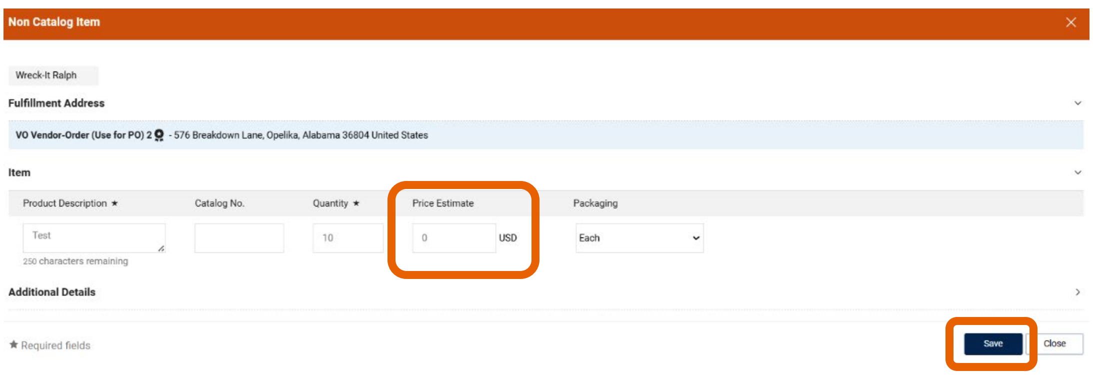
4. **Create Change Request** box will appear. Read the instructions carefully and complete the required fields. Select users you want to notify of the change. **Please do not include Procurement, as change requests may route to them to review/approve.** Add a detailed note of what is being changed in the comments box that is presented and upload any documentation you have.



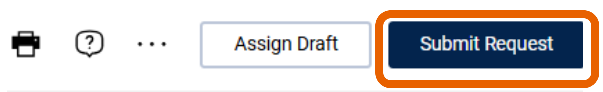
5. To open the line and edit details, select the item.

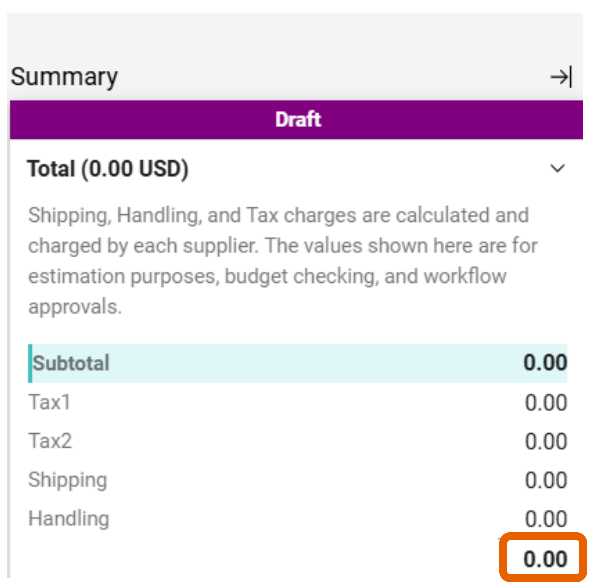


6. Change the price to $0 and select **Save**.

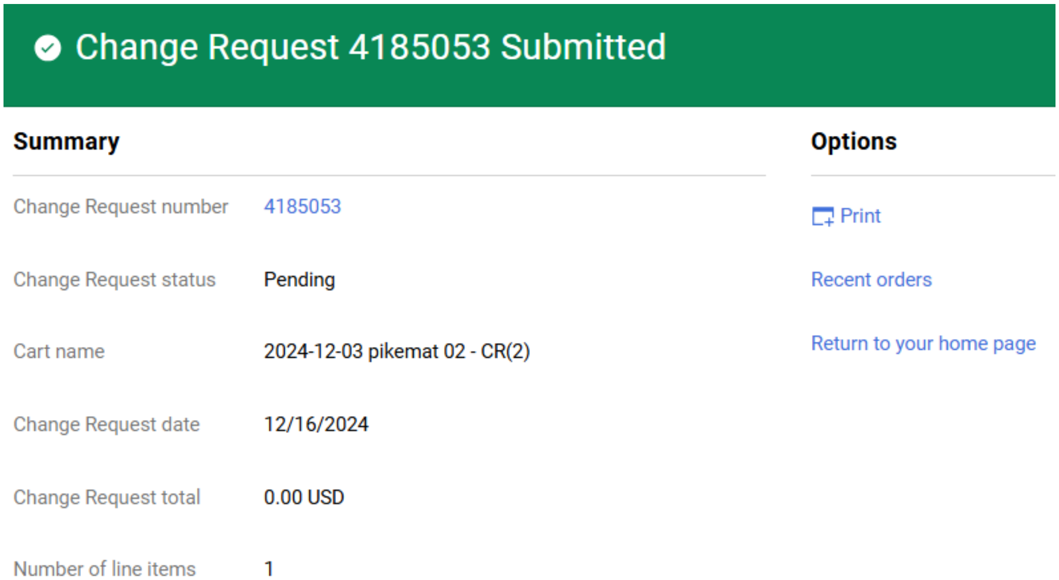


7. Note on the right side of the PO, your balance should now show a zero-dollar amount. Select **Submit Request**.





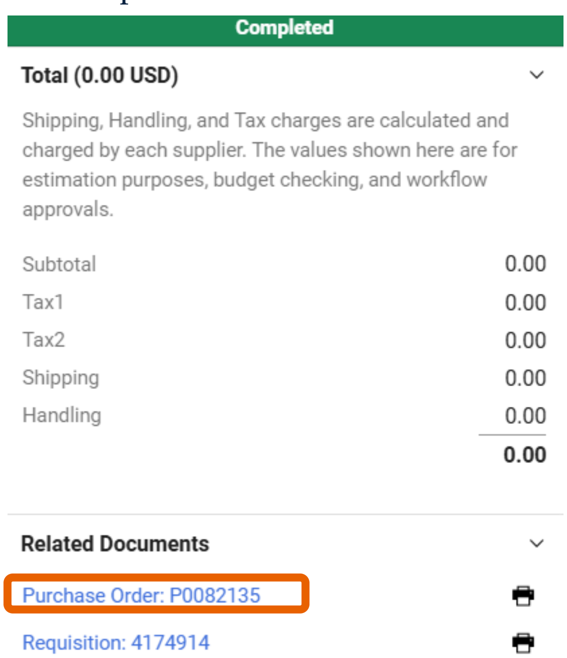
8. A confirmation for the change request will appear once it has been submitted.



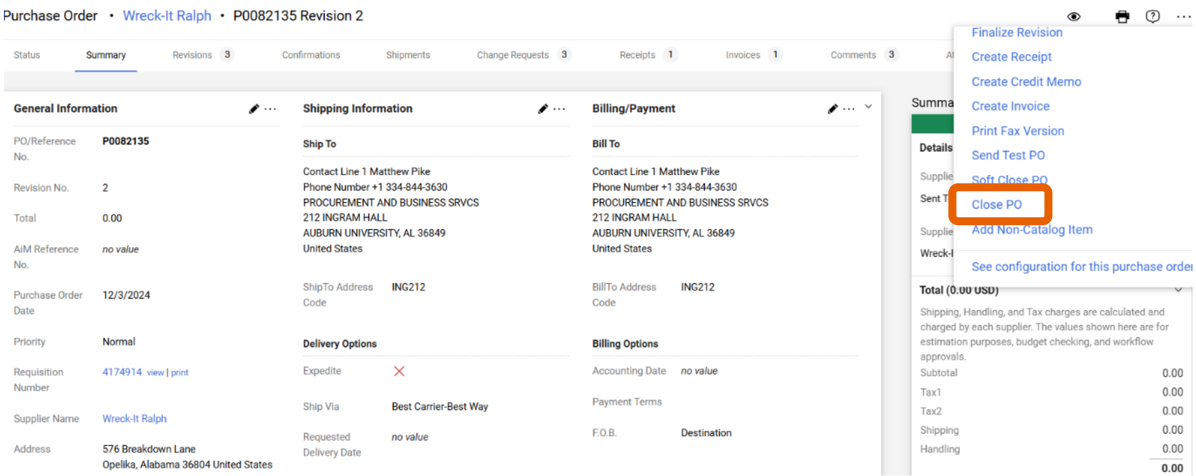
9.5 <u>Closing a PO</u>

Target Audience: **Approver**

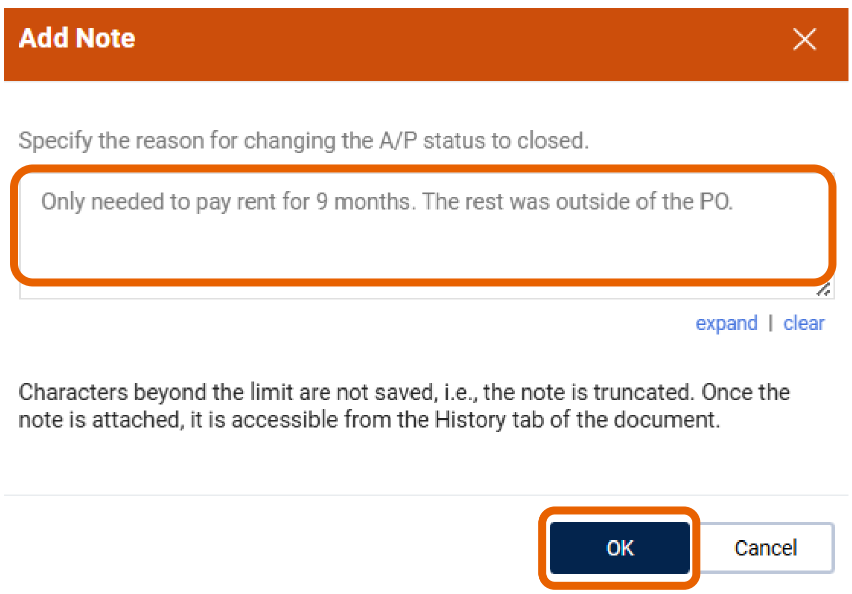
1. Once the change is complete and the balance is zero, the AP status is ready to be changed to a closed status. This step needs to be completed in order for the PO to close in Banner. Select the purchase order that needs to be closed.



2. To close the PO from a completed PO, select **Close PO** from the dropdown menu next to the PO number.



3. Enter the reason for closing the PO in the comments section and select **OK**.



4. The AP status for the PO is now closed.