

TIGER  BUY

Table of Contents

Quick Reference Guide

- Overview
- User Roles
- FAQs
- Purchasing Categories
- Contact Information

Customizing User Profiles

- 1.0 Signing in to TigerBuy
- 1.1 Setting Default Accounting Code Favorites
- 1.2 Entering Default Accounting Codes to your profile
- 1.3 Entering Default Shipping Address
- 1.4 Entering Default Billing Address
- 1.5 Updating Email Notifications
- 1.6 Customizing Personal Settings
- 1.7 Customizing User Dashboard
- 1.8 Entering a Default Cart Assignee
- 1.9 User Access and Roles
- 1.10 Setting Up TigerBuy Mobile App
- 1.11 Installing the App

Cart Creation

- 2.1 Searching by Supplier
- 2.2 Creating Shopping Carts from Punch-Out Catalog
- 2.3 Creating Shopping Carts from Non-Catalog Items and for Sourcing Events
- 2.4 Canceling Punch-Out Sessions
- 2.5 Assigning Shopping Cart to Requisitioner
- 2.6 Unassigning Shopping Cart to Requisitioner
- 2.7 Creating a Cart from a Sole Sources Justification
- 2.8 Creating a Cart from a Vehicle Request Form
- 2.9 Submitting a New Supplier/Update Request

Requisition Creation

- 3.0 Modifying Draft Shopping Carts
- 3.1 Deleting a Draft Cart
- 3.2 Creating New Shopping Carts by Copying Requisitions
- 3.3 Adding Items to an Assigned Shopping Cart
- 3.4 Editing Assigned Shopping Carts
- 3.5 Proceeding to Checkout
- 3.6 Withdrawing a Requisition from Workflow
- 3.7 Splitting Accounting Charges
 - 3.7a Header Level Accounting
 - 3.7b Line Level Discount
- 3.8 Adding Notes and Attachments



- 3.9 Applying a Discount in the Cart
 - 3.9a Header Level Discount
 - 3.9b Line Level Discount
- 3.10 Adding Comments
- 3.11 Editing Returned Requisitions
- 3.12 Previewing Requisition Workflow and Purchase Orders
- 3.13 Viewing a Purchase Order

Status and Approval of Requisitions

- 4.0 Assigning Substitute Requisitioners
- 4.1 Navigating Approver Workflow Queues
- 4.2 Reviewing, Assigning, and Approving Requisitions
- 4.3 Returning Requisitions to Shared Approver Folders
- 4.4 Sending Comments to the Requisitioner without Returning the Requisition
- 4.5 Forwarding a Requisition to Another Approver
- 4.6 Rejecting Requisitions
- 4.7 Removing/Editing Notifications
- 4.8 Reviewing and Approving Form Requisitions
- 4.9 Assigning Substitute Approvers

Sourcing Events (Bids & RFPs)

- 5.0 Sourcing Event
- 5.1 Sourcing Event Information
- 5.2 Sourcing Event Evaluation

Receiving Orders/Products

- 6.0 Creating Quantity Receipts
- 6.1 Creating a Quantity Receipt to Simultaneously Receive and Return an Item
- 6.2 Creating Receipt Returns
- 6.3 Creating Cost Receipts
- 6.4 Canceling a Receipt
- 6.5 Viewing Receipts

Invoice Approvals & AP Forms

- 7.0 Creating an Invoice from a PO
- 7.1 Creating a Non-PO Invoice
- 7.2 Creating a Credit Memo
- 7.3 Creating a Payment Request
- 7.4 Creating a Special-Handling Check Request
- 7.5 Creating a Multi-Payment Request
- 7.6 Creating a New Address
- 7.7 Completing a Purchasing Card Application
- 7.8 Maintaining Your Purchasing Card

Contracts

- 8.0 Requesting a New Contract
- 8.1 Viewing Your Contract Requests
- 8.2 Searching Contract Requests

Requisition/PO Inquiry and Change Requests

9.0 Viewing a Requisition

9.1 Viewing a Purchase Order (PO)

9.2 Viewing an Invoice

9.3 Submitting a Change Request

9.4 Requesting a Change to Bring a PO Balance to \$0

9.5 Closing a PO





Auburn University TigerBuy

Quick Reference Guide

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 Procure-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

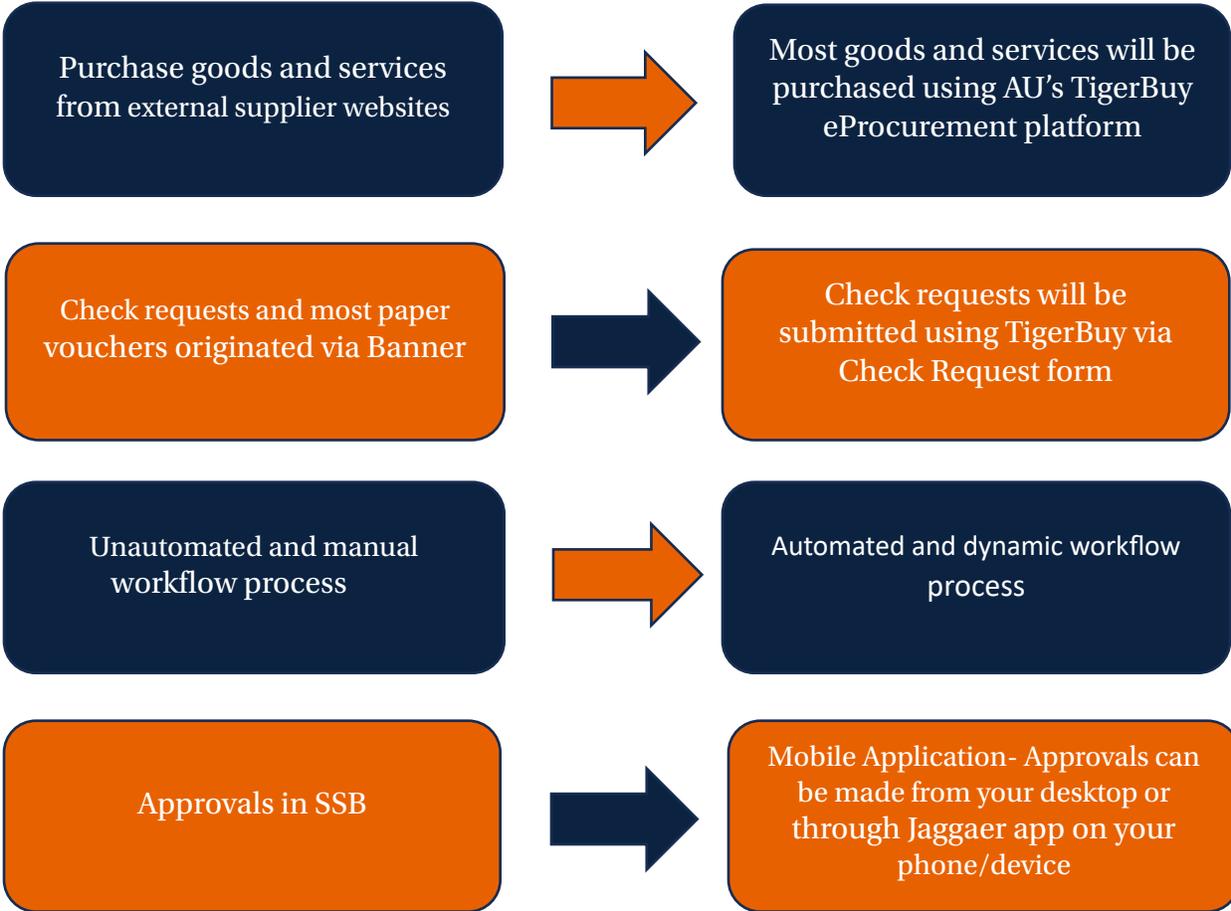
- Use of internal notes, comment, and attachments to others processing the purchase
- Use of external notes to communicate with suppliers, which are enabled to receive such communication



What's New and Different Overview

Previous Method

New Method



TigerBuy Homepage (Top Half)

Announcements from Procurement & Business Services

Print Program Plus Contract

PBS is excited to announce a new contract offering through collaboration with OCM, Print Program Plus (PP+). Please use the link below to view the pricing matrix, which can be found by logging into box.com with your AU credentials. Also, please reference our FAQs for additional information!

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!

TRAINING AND HOW-TOS

Training Registration

TigerBuy training is now available through Elevate! This one day, in-person course will take you through the ins & outs of all things TigerBuy.

Videos

Are you someone who likes self-paced learning? Check out our YouTube channel for quick tutorials on everything from Purchasing Card Creation to...

Training Manuals

Maybe you prefer the hard copy version of a training manual. Look no further, as PBS has published our entire TigerBuy Training Manual in...

TigerBuy Homepage (Bottom Half)

Punch-Out Suppliers

- amazonBUSINESS
- BH Preferred (Audio/ Visual)
- Connection Preferred (IT)
- GRAINGER Preferred (MRO)
- MAYER Preferred (Electrical)
- ARIZON Preferred (Medical Supplies)
- Nikon Preferred (Scientific)
- STAPLES Preferred (Office Supplies)
- VWR Preferred (Scientific)

Preferred Suppliers (Non-Punchout)

- Enterprise (Vehicle Rentals)
- Davis Direct (Stationery)
- Konica Minolta (Copiers/ Toner)
- Diversified AV Services & Solutions

Procurement Requests

- Sole Source Justification
- Vehicle Request
- PSC Request
- Address Request
- Preferred Vendor Feedback
- Vendor Complaint
- AP Requests & PCARD Requests
- Payment Request
- Multi-Payment Request
- Special Handling Check Request
- Purchasing Card Application
- Card Account Maintenance

Key Definitions

SYSTEM DOCUMENTS

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.

SHOPPING ITEMS

SYSTEM USERS



Side Navigation Menu

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

Home

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

Shop

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

Orders

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

Contracts

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

Accounts Payable

The Suppliers section allows you to

Suppliers

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

Sourcing

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

Reporting

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

Administer

Setup

The Menu Search section allows you to search the system.

Menu Search

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





The **Organization Message** section displays useful information for users.

Announcements from Procurement & Business Services

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Links to **TigerBuy** training requests and HRD training

How-To Videos

Training Documents

Shortcuts allows for quick access to your Requisitions and POs

Shortcuts

- Create Requisition
- Create New Invoice, Credit Memo...
- Contract Request
- Draft Carts/Requisitions
- My Requisitions
- My Purchase Orders
- My Invoices

Training Registration
TigerBuy training is now available through ElevatED! This one day, in-person course will take place on [Monday, October 15, 2018](#) from [10:00 AM - 12:00 PM](#) in [Room 100](#).

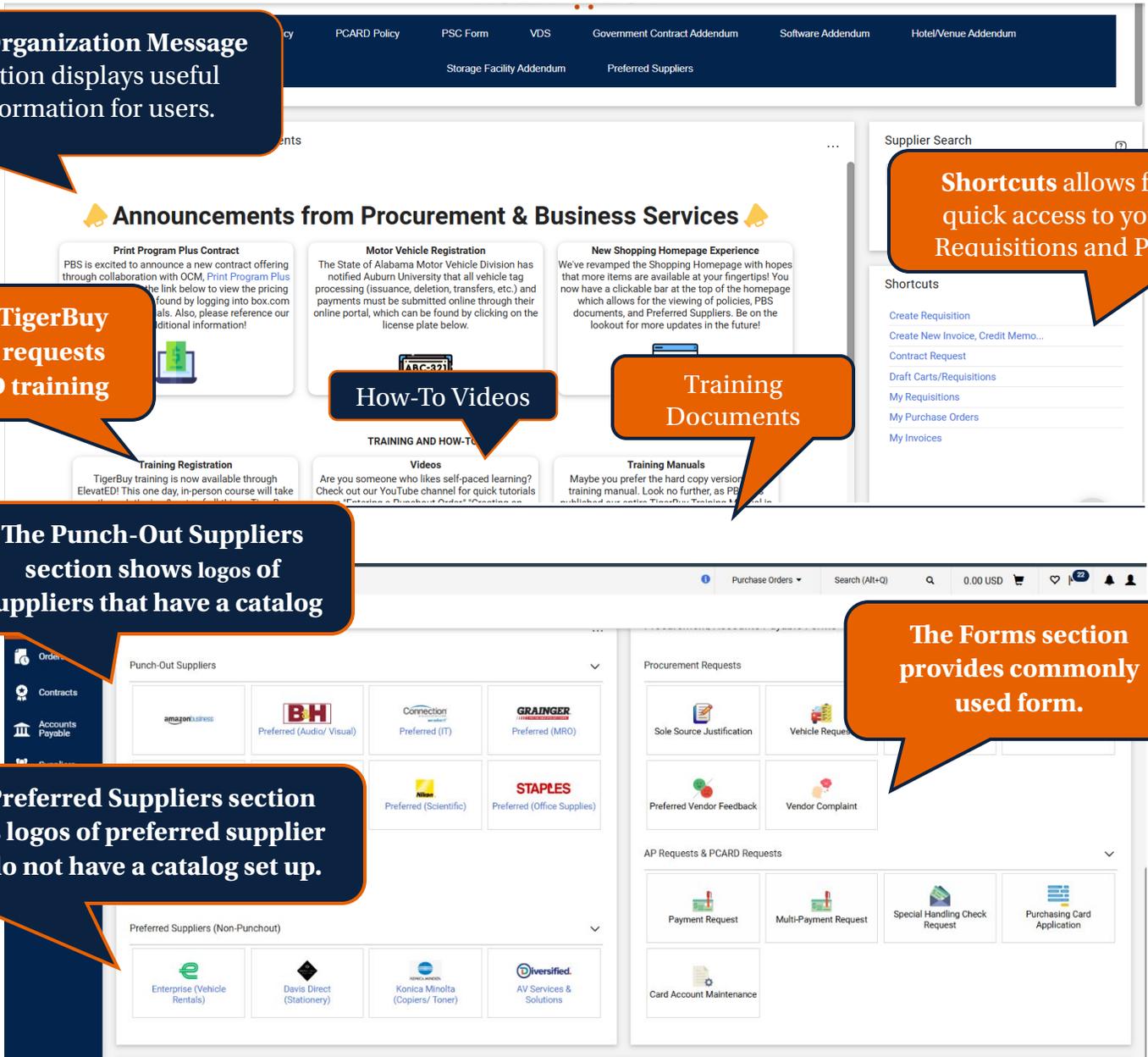
Videos
Are you someone who likes self-paced learning? Check out our YouTube channel for quick tutorials on [Procurement](#), [Purchasing Cards](#), and [Accounts Payable](#).

Training Manuals
Maybe you prefer the hard copy version of a training manual. Look no further, as PBS has published our [Procurement Training Manual](#) and [Purchasing Card Training Manual](#).

The **Punch-Out Suppliers** section shows logos of suppliers that have a catalog

The **Forms** section provides commonly used form.

The **Preferred Suppliers** section shows logos of preferred supplier who do not have a catalog set up.



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

<u>Category#</u>	<u>Category Name</u>
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.

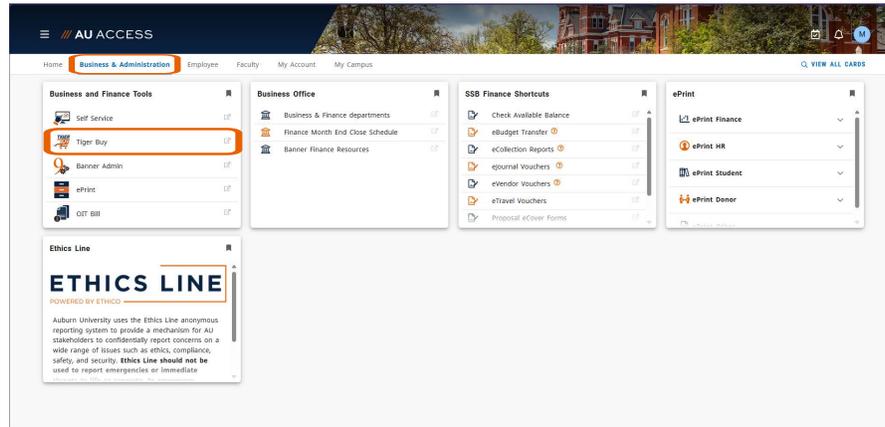
Auburn University TigerBuy

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?

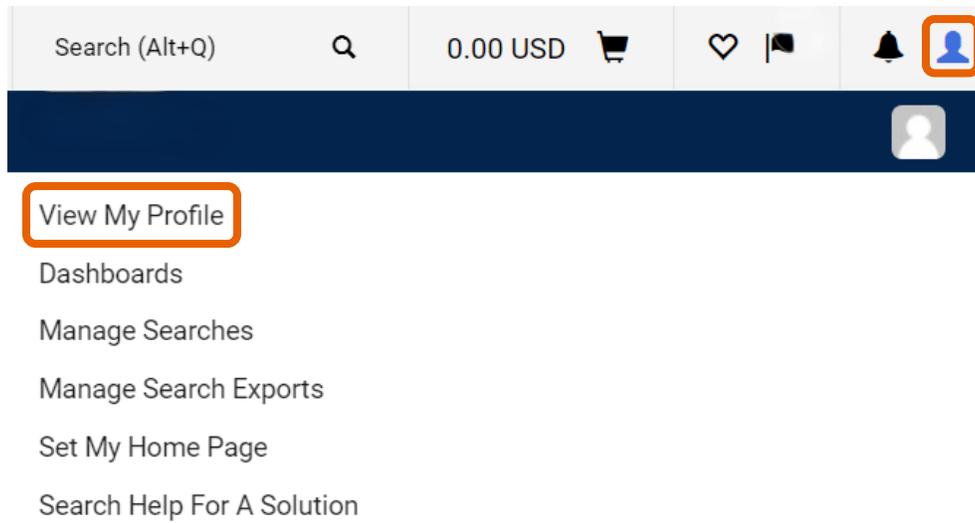
Profiles in TigerBuy allow you to make the buying and paying process more efficient and customize your user experience by allowing you to save default information, shipping addresses, frequently used FOAPs, cart assignees, notification preferences, and email approval options. Note: Some of the values 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**.



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

Custom Field and Accounting Code Defaults

Header (int.) Codes **Code Favorites** ?

Business Units: Auburn University (Auburn_University) v

Use Code Favorites for quick access to accounting code combinations saved to your profile during checkout. You may create a new Code Favorite by clicking the "Add" button and entering a commonly used combination of accounting codes with or without splits. Code Favorites are accessed during checkout by editing the codes section or by selecting it as your default accounting codes in your profile.

Add

Accounting Codes ?

PBS FOAP Edit Delete

Chart	Bank Code	Fund	Fund Type	Organization	Account	Program	Activity
-------	-----------	------	-----------	--------------	---------	---------	----------

- 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.

Accounting Codes

Nickname Default

Chart	Bank Code	Fund	Fund Type	Organization	Account	Program	Activity
A	05	101001-A	1A	113600-A		7000-A	
<small>Select from profile values... Select from all values...</small>	<small>Select from all values...</small>						

Save Cancel

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

Fund

[Select from profile values...](#)
[Select from all values...](#)

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.

Value	Description
260000-A	C&G Accounting Clearing
260010-A	C&G Accounting Holding
272403-A	Accounting Education Gifts 691815
328521-A	Accounting Excellence Sch
328524-A	AFLAC Inc Annual Accounting Schshp
328547-A	KPMG Accounting Schshp 272401
345760-A	Martin Annl Accounting Flwshp
354022-A	Accounting AUM Gifts

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

Chart	Bank Code	Fund	Fund Type	Organiza
A	05	260000-A	1A	113600-A

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.

Header (int.) **Codes** Code Favorites

Custom Field Name	Default Value	Description	Edit Values
Chart	A	Auburn University	Edit
└ Bank Code	05	Bank Code for Chart A	Edit
└ Fund	No Default Value		Edit
└ Account	No Default Value		Edit
└ Activity	No Default Value		Edit
└ Organization	No Default Value		Edit
└ Program	No Default Value		Edit

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**.

Header (int.) **Codes** Code Favorites

Custom Field Name	Default Value	Description	Edit Values
Fund	No Default Value		Edit

Create New Value

Value Description

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

Search For Value

Field Name Fund

Value

Description

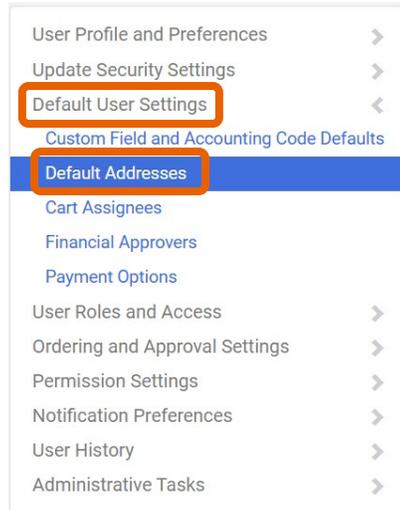
Results Per Page 5

Search

1.3 Entering Default Shipping Address

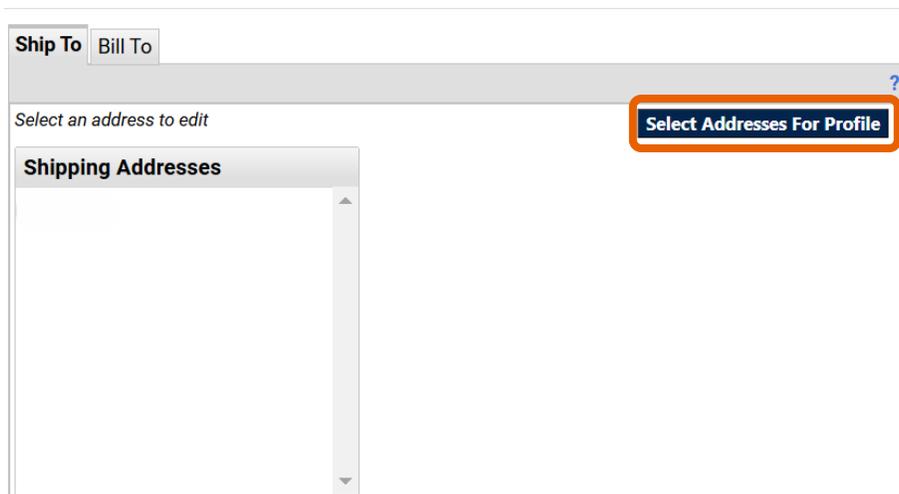
Target Audience: **Requisitioner**

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.

Default Addresses



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.

Address Search

Nickname / Address
Text

Results Per Page 10 ▾

Search

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

Address Search

Nickname / Address 212 Ingram Hall
Text

Results Per Page 10 ▾

Search

Addresses Found: 1 Page 1 of 1

Name	Address
<input type="radio"/> ING212	Contact Line 1 Phone Number +1 334-844- PROCUREMENT AND BUSINESS SRVCS 212 INGRAM HALL AUBURN UNIVERSITY, AL 36849 United States

- You will be prompted to complete user-specific data 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.

Default Addresses

Ship To **Bill To** ?

Select an address to edit **Select Addresses For Profile** **Delete Address**

Shipping Addresses	Edit Selected Address
ING212	Nickname <input type="text" value="ING212"/>
	Default <input type="checkbox"/>
	Current Default Address ING212
	A D D R E S S
	Contact Line 1 *★ <input type="text"/>
	Phone Number *★ <input type="text" value="+1 334-844-1..."/>
	Address Line 1 PROCUREMENT AND BUSINESS SRVCS
	Address Line 2 212 INGRAM HALL
	City AUBURN UNIVERSITY
	State AL
	Zip Code 36849
	Country United States
	Save

1.4 Entering Default Billing Address

Target Audience: **Requisitioner**

- 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.

Default Addresses

Ship To **Bill To** ?

Select an address to edit **Select Addresses For Profile**

Billing Addresses
ING212

- 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.

Select Addresses For Profile

Address Search

Nickname / Address Text

Results Per Page 10 ▼

Search

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

Default Addresses

Ship To **Bill To**

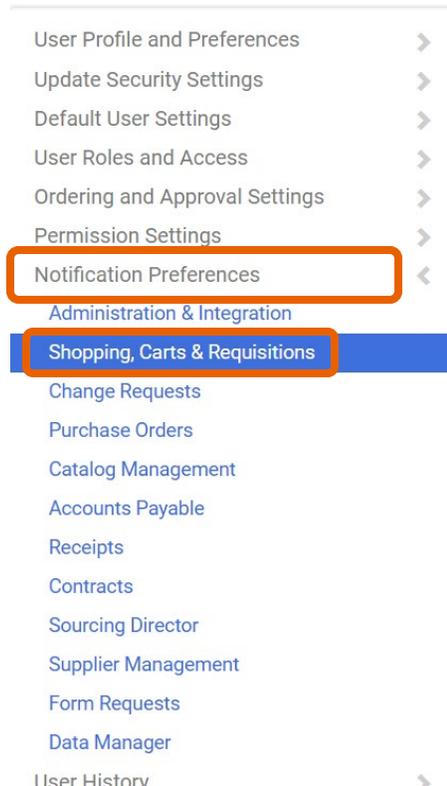
Select an address to edit **Select Addresses For Profile** **Delete Address**

Billing Addresses	Edit Selected Address
ING212	<p>Nickname <input type="text" value="ING212"/></p> <p>Default <input checked="" type="checkbox"/></p> <p>Current Default Address ING212</p> <hr/> <p>ADDRESS</p> <p>Contact Line 1 * <input type="text"/></p> <p>Phone Number * <input type="text" value="+1 334-844-"/></p> <p>Address Line 1 PROCUREMENT AND BUSINESS SRVCS</p> <p>Address Line 2 212 INGRAM HALL</p> <p>City AUBURN UNIVERSITY</p> <p>State AL</p> <p>Zip Code 36849</p> <p>Country United States</p> <p style="text-align: center;">Save</p>

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.

Notification Preferences: [Edit Section](#)

Shopping, Carts & Requisitions

The in-application notifications are not yet available for all Email Notifications. ?

Prepared By - Cart Assigned Notice ?	None
Prepared By - PR line item(s) rejected ?	None
Prepared By - PR rejected/returned ?	None
Cart Assigned Notice ?	None
Receive PR and PO notifications for Carts Assigned to Me ?	None
Assigned Cart Processed Notification ?	None
Assigned Cart Deleted Notification ?	None
PR submitted into Workflow ?	None

- 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.

PR Workflow Notification available [?]	<input checked="" type="radio"/> Default	<input type="radio"/> Override	None
PR Workflow complete / PO created [?]	<input checked="" type="radio"/> Default	<input type="radio"/> Override	None
PR line item(s) rejected [?]	<input type="radio"/> Default	<input checked="" type="radio"/> Override	<div style="border: 2px solid orange; padding: 5px;"> Email & Notification ▼ None Email Notification Email & Notification </div>
Cart/PR rejected/returned [?]	<input checked="" type="radio"/> Default	<input type="radio"/> Override	
Sourcing Event created from Requisition [?]	<input checked="" type="radio"/> Default	<input type="radio"/> Override	
PR created from an awarded Sourcing Event [?]	<input checked="" type="radio"/> Default	<input type="radio"/> Override	None
Cart created from an awarded Sourcing Event [?]	<input checked="" type="radio"/> Default	<input type="radio"/> Override	None

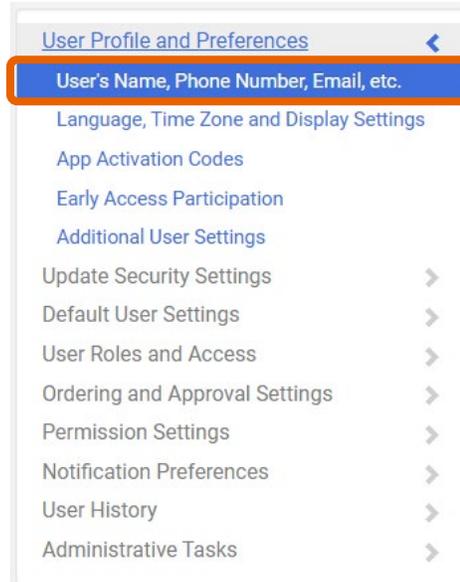
Save Changes

- 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**.

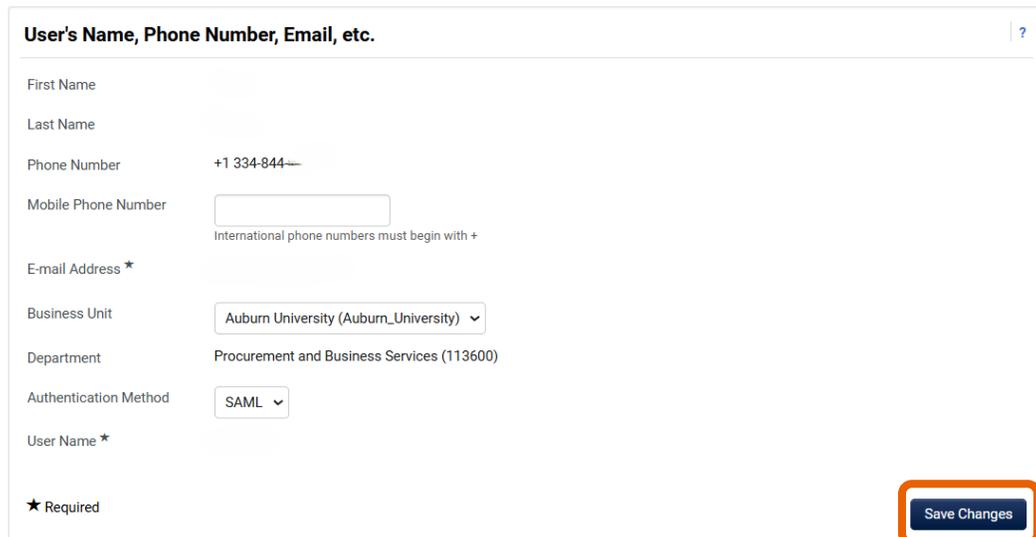
1.6 Customizing Personal Settings

Target Audience: **All**

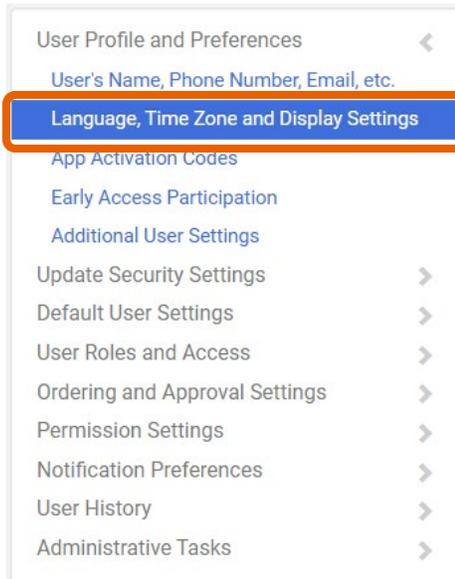
1. Users can customize some of their personal settings in TigerBuy by navigating to the **View My Profile** option, then **User's name, Phone Number, Email, etc.**



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.*

A screenshot of the "User's Name, Phone Number, Email, etc." settings page. The page title is "User's Name, Phone Number, Email, etc." with a help icon on the right. The form contains the following fields: "First Name", "Last Name", "Phone Number" (with a value of "+1 334-844-"), "Mobile Phone Number" (with a note: "International phone numbers must begin with +"), "E-mail Address *", "Business Unit" (dropdown menu showing "Auburn University (Auburn_University)"), "Department" (text field showing "Procurement and Business Services (113600)"), "Authentication Method" (dropdown menu showing "SAML"), and "User Name *". A legend at the bottom left indicates "★ Required". A "Save Changes" button is located at the bottom right and is highlighted with an orange box.

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.

A screenshot of the 'Language, Time Zone and Display Settings' configuration page. The page title is 'Language, Time Zone and Display Settings' with a help icon. The settings are as follows:

- Select a Language: English (dropdown)
- Country: United States (dropdown)
- Currency: USD (dropdown)
- Time Zone: CDT/CST - Central Standard Time (US/Central) (dropdown with search icon)
- Color Theme: (dropdown)
- Preferred email format: (dropdown)
- Form Display: Default Override (Current Window)
- Access Training Content Configuration: Yes No
- Home Page: Default Override (Shopping Home - Shop / Shopping / Go To / Shopping Home)

Accessibility

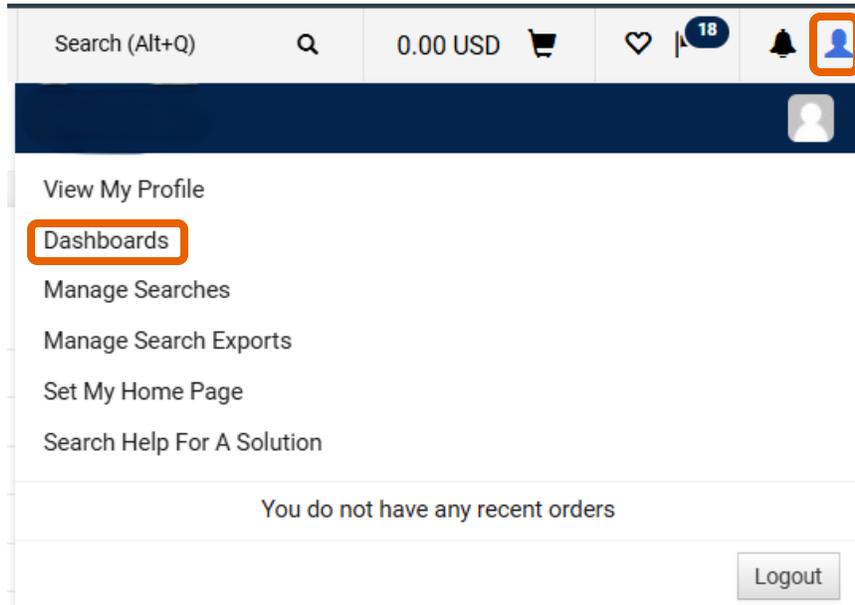
- Enable Accessibility Mode: Yes No
- Help on mouse over: (dropdown with help icon)
- Enable Limited Animation: Yes No

Save Changes (button highlighted with an orange border)

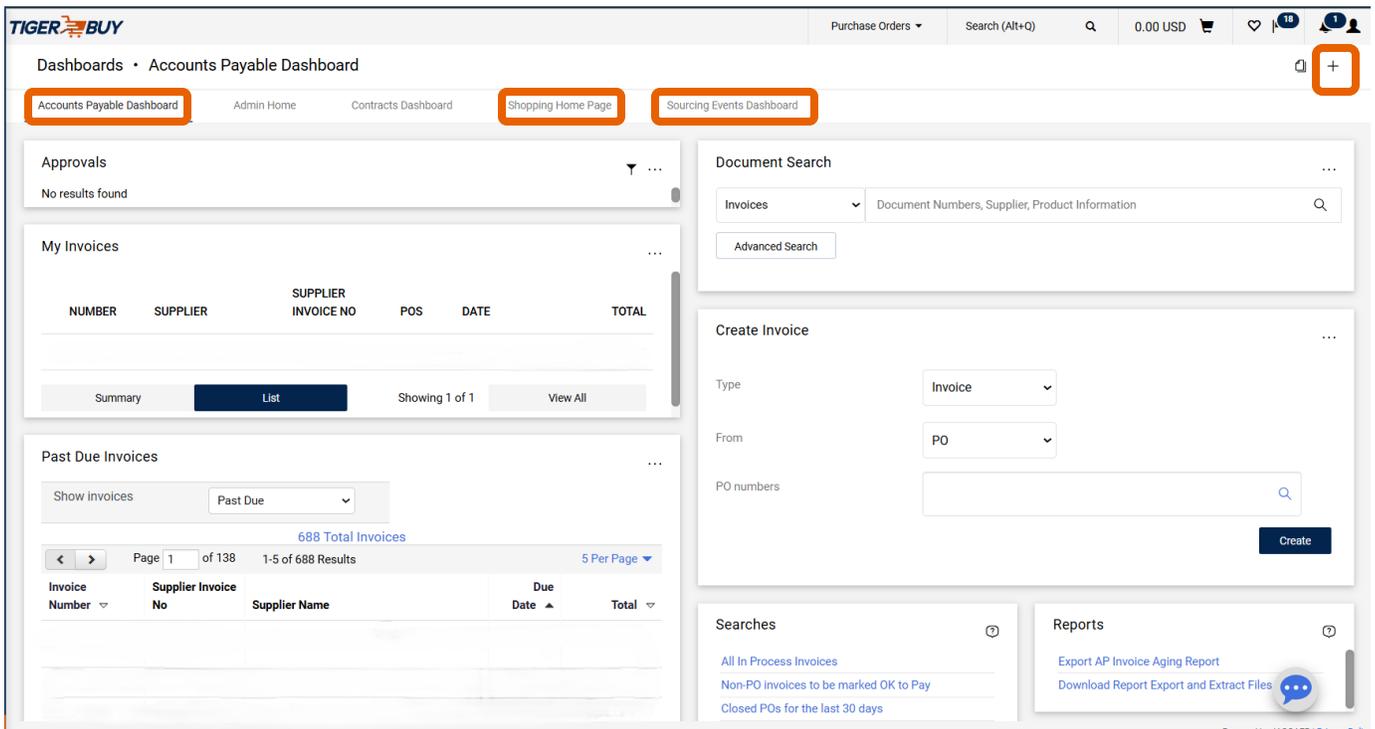
1.7 Customizing User Dashboards

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.



TIGER BUY Purchase Orders Search (Alt+Q) 0.00 USD

Dashboards · Accounts Payable Dashboard

Accounts Payable Dashboard Admin Home Contracts Dashboard Shopping Home Page Sourcing Events Dashboard

Approvals
No results found

My Invoices

NUMBER	SUPPLIER	SUPPLIER INVOICE NO	POS	DATE	TOTAL
Showing 1 of 1					

Summary List View All

Past Due Invoices

Show Invoices Past Due

688 Total Invoices

Page 1 of 138 1-5 of 688 Results 5 Per Page

Invoice Number	Supplier Invoice No	Supplier Name	Due Date	Total
Showing 1 of 1				

Document Search

Invoices Document Numbers, Supplier, Product Information

Advanced Search

Create Invoice

Type Invoice

From PO

PO numbers

Create

Searches

- All In Process Invoices
- Non-PO Invoices to be marked OK to Pay
- Closed POs for the last 30 days

Reports

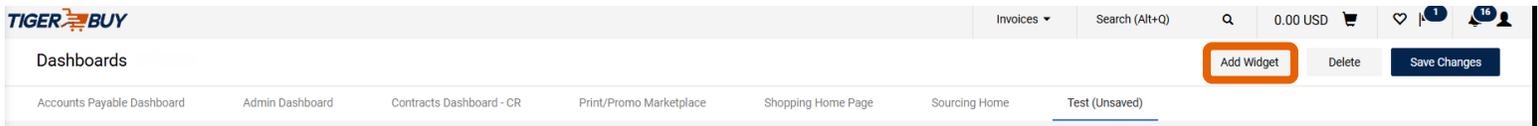
- Export AP Invoice Aging Report
- Download Report Export and Extract Files

Powered by JAGGAER | Privacy Policy

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

The screenshot shows a 'Create Dashboard' dialog box with a close button (X) in the top right corner. Below the title bar, there is a text input field labeled 'Name (Default Language Value) *' which is highlighted with an orange border. Below this field is a 'Languages' section with an 'Add/Edit Translations' button. At the bottom of the dialog, there is a '★ Required' label and two buttons: 'Create' (highlighted with an orange border) and 'Close'.

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



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

The screenshot shows an 'Add Widget' dialog box with a close button (X) in the top right corner. It features a 'Widget Category' dropdown menu set to 'All'. Below this is a list of widget types, each with an 'Add...' button. The 'Approvals' widget, described as 'Overview of documents that are available to approve.', has its 'Add...' button highlighted with an orange box. Other widget types include Action Items, Bookmarks, Contract Alerts, Contract Search, Contract Summary, Create Invoice, Dashboard Navigation, and Display Search Results. A 'Close' button is located at the bottom right of the dialog.

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

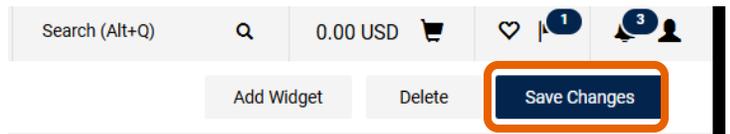
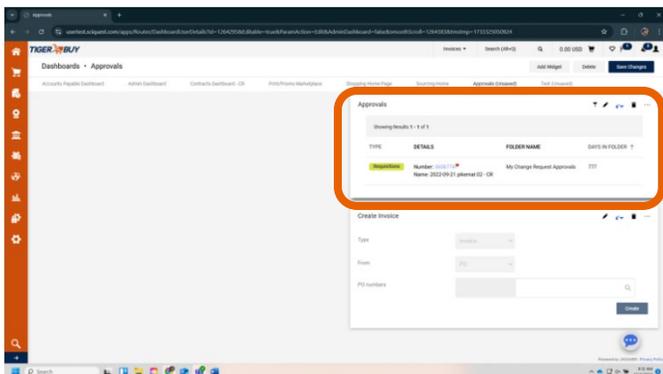
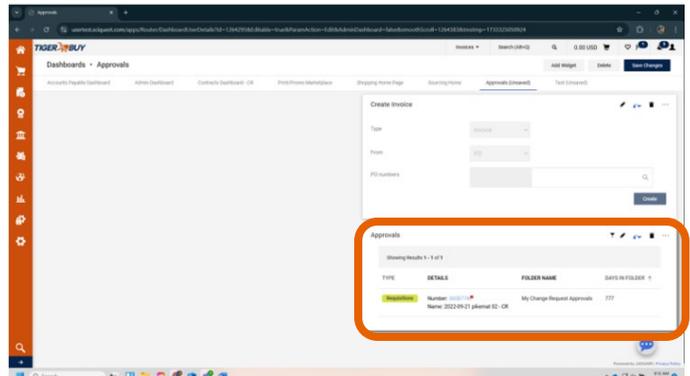
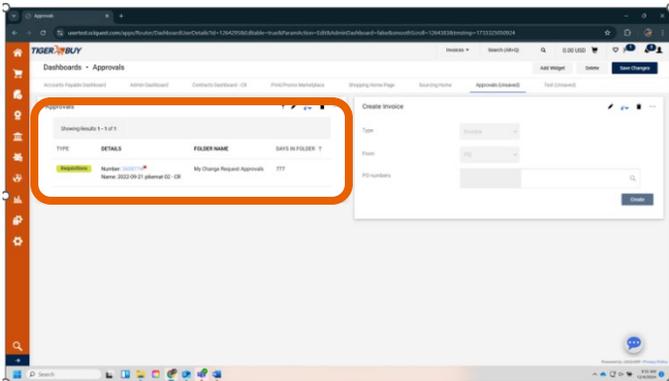
Approvals

Name (Default Language Value)

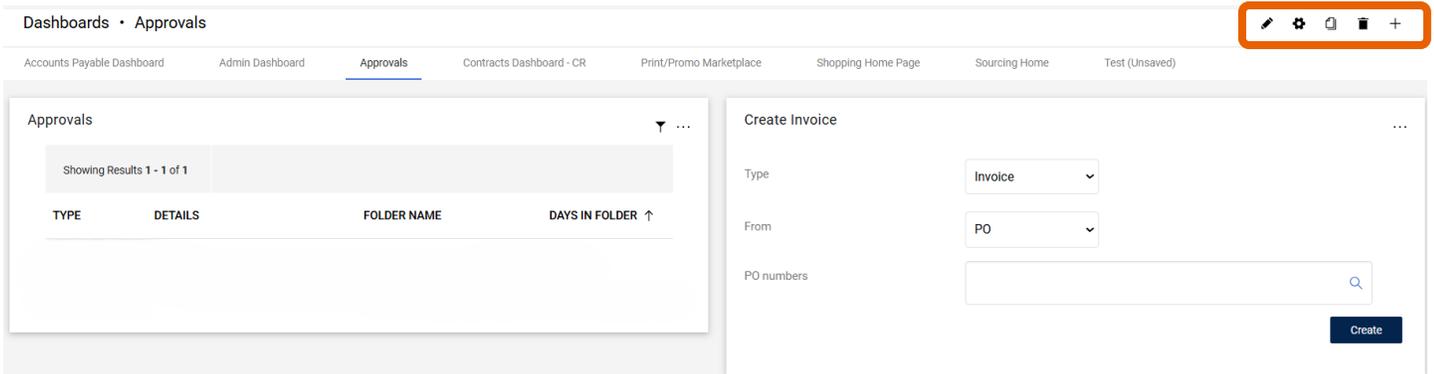
Languages

Auto-size Yes No

- 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**.



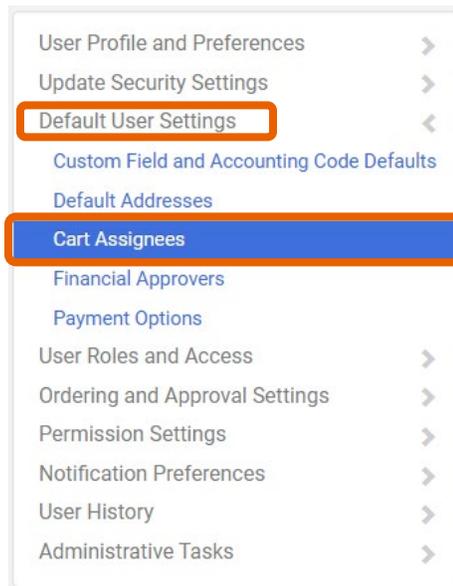
- Now users will see their completed dashboard. The edit buttons have moved to the top if any future changes need to be made.



1.8 Entering a Default Cart Assignee

Target Audience: **Requisitioner**

- 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.



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

Cart Assignees

Add Assignee...

My Cart Assignees ?

Name	Action

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

User Search ?

Last Name ?

First Name ?

User Name ?

Email ?

Business Unit ? Q

Department ?

Role ?

Results Per Page v

Search

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

Name ▲	User Name ▲	Email ▲	Phone	Action
		@auburn.edu	+1 334-844~	[select]

- 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.

Cart Assignees

Add Assignee...

My Cart Assignees ?

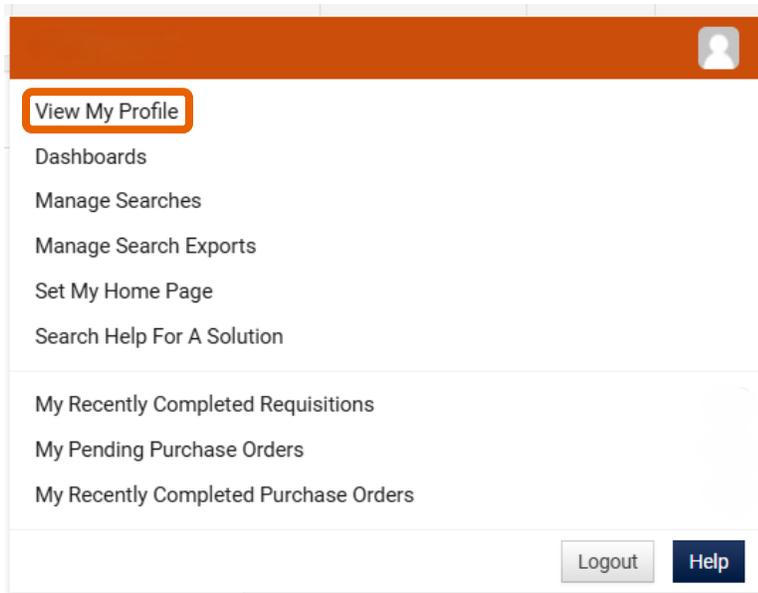
Name	Action
	Set as Preferred Remove

1.9 User Access and Roles

Target Audience: **All**

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

- 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.



View My Profile

Dashboards

Manage Searches

Manage Search Exports

Set My Home Page

Search Help For A Solution

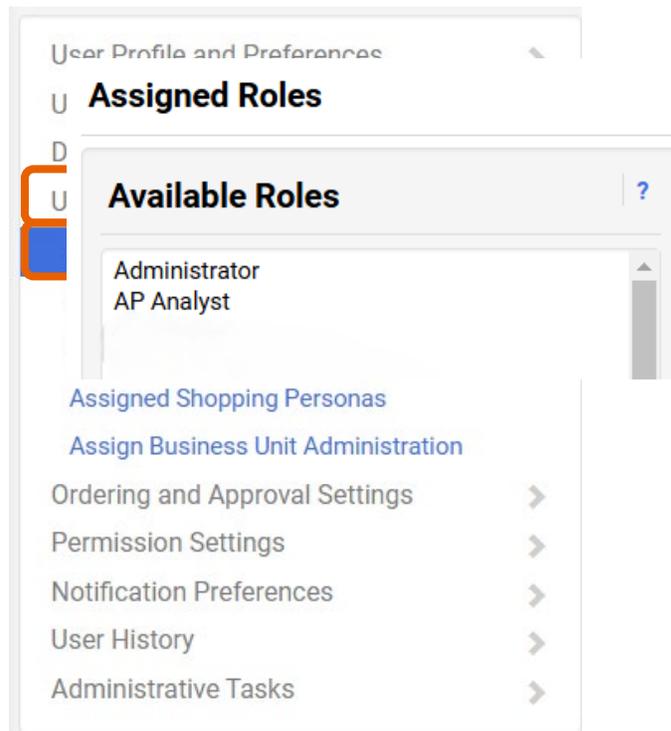
My Recently Completed Requisitions

My Pending Purchase Orders

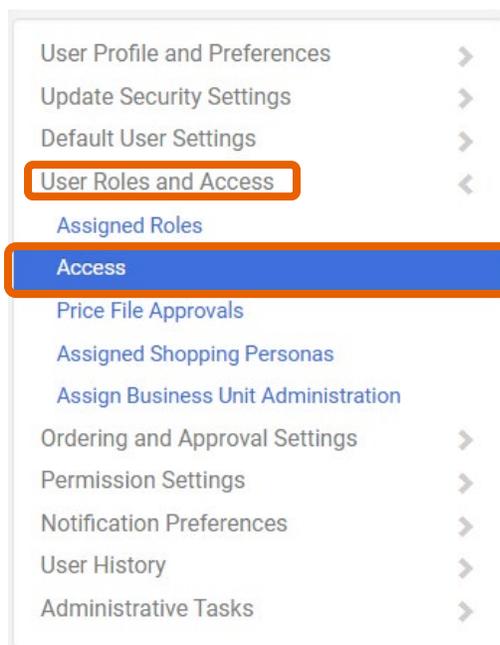
My Recently Completed Purchase Orders

Logout Help

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.



- 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.

Access

Access
This page defines the document search and persona shopping access for the user. Each selection below adds to the visibility of the user's document search results and/or persona shopping access.

- This user has the **View Organization Orders** permission and has access to see all organization orders in Document Search. Document Access assignments below do not apply.
- This user's access to organization **invoices** in Document Search is defined below.
- This user's **persona Shopping** access is defined below. [manage personas](#)

Save

Department Assignments: ? Business Unit Assignments: ?

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.

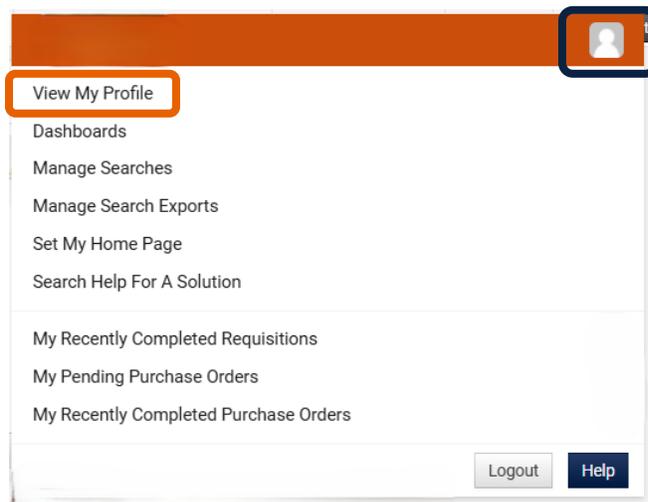
- Manage documents assigned to you for approval.
- Access your action items and notifications.

Supported Devices

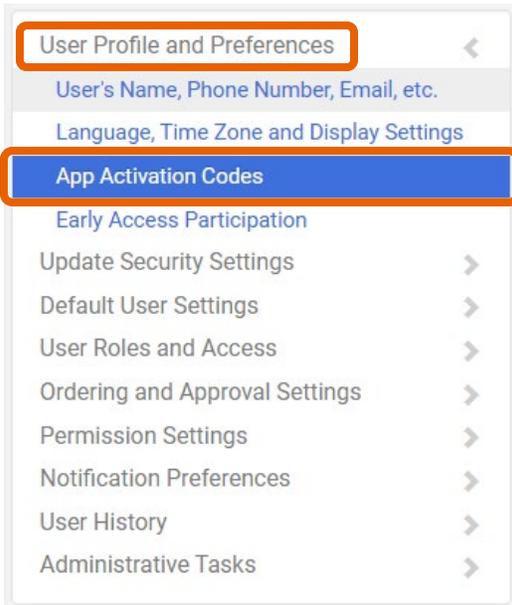
The TigerBuy mobile app is currently available for both iOS (version 10.0 and higher) and Android (version 4.0.3 and higher) in their stores. The app will function on an iPad but it is scaled for a smaller iPhone screen.

1.11 Installing the App

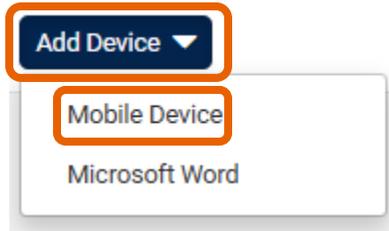
- Log in to TigerBuy. Select on the  icon on the right, then **View My Profile**.



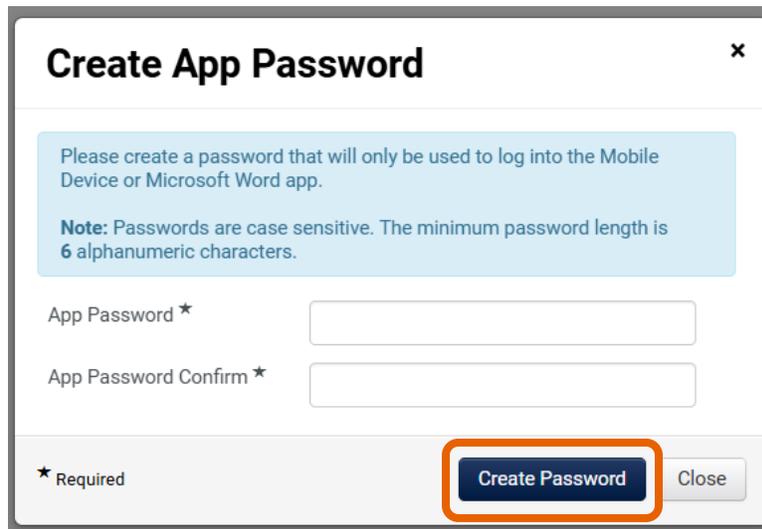
2. Select on **App Activation Codes**.



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.

Add Device ×

Please create a nickname for this device and choose whether you want to email the user the code. You will be presented with the code on the next screen as well.

Device Name ★

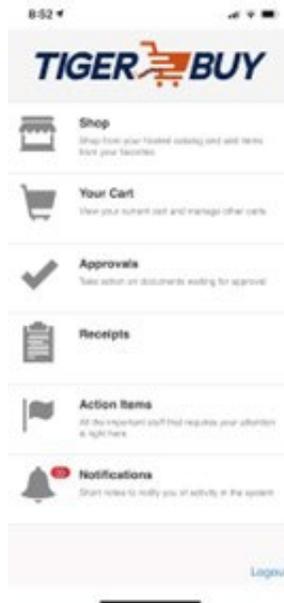
Email Activation Code to User? Yes No

★ Required

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.





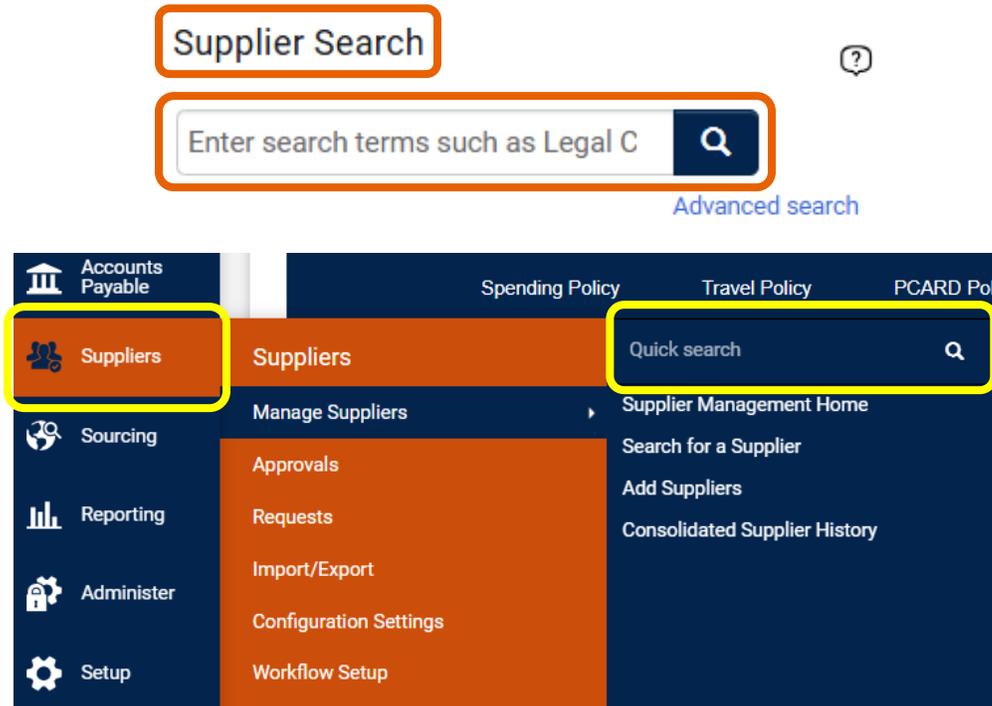
Auburn University TigerBuy

Module 2: Cart Creation

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.



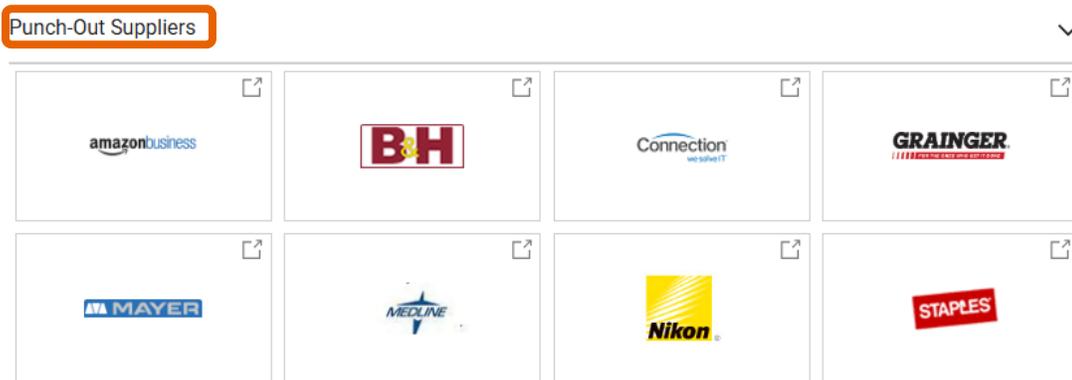
2.2 Creating Shopping Carts from Punchout Catalog

Target Audience: **Requisitioner**

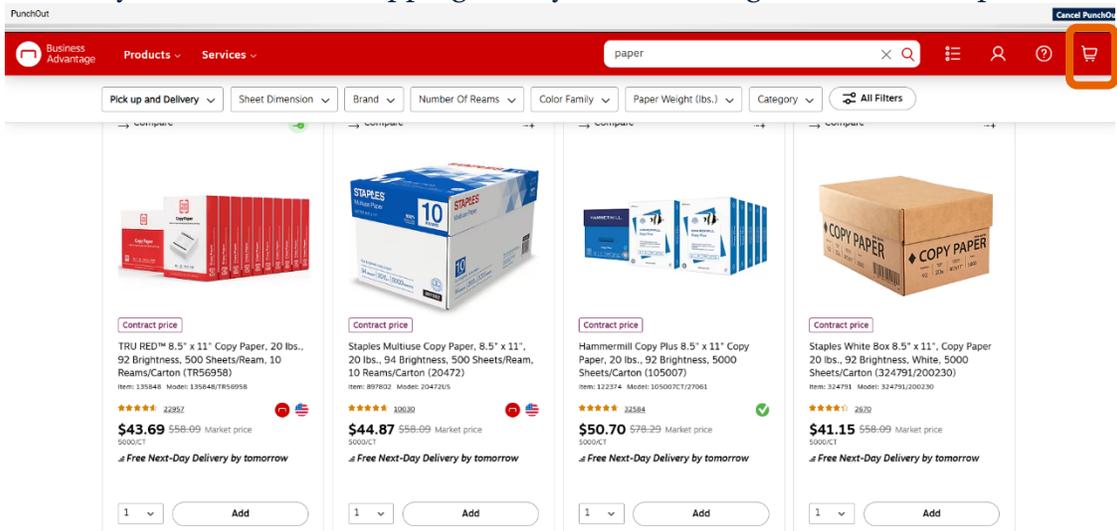
Users can create shopping carts from the supplier **punchout catalogs**. A punchout catalog is a catalog that resides in the supplier's website. When users shop using a punchout catalog, they are directed to the supplier's catalog to fill a cart and then return it to TigerBuy for processing.

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.

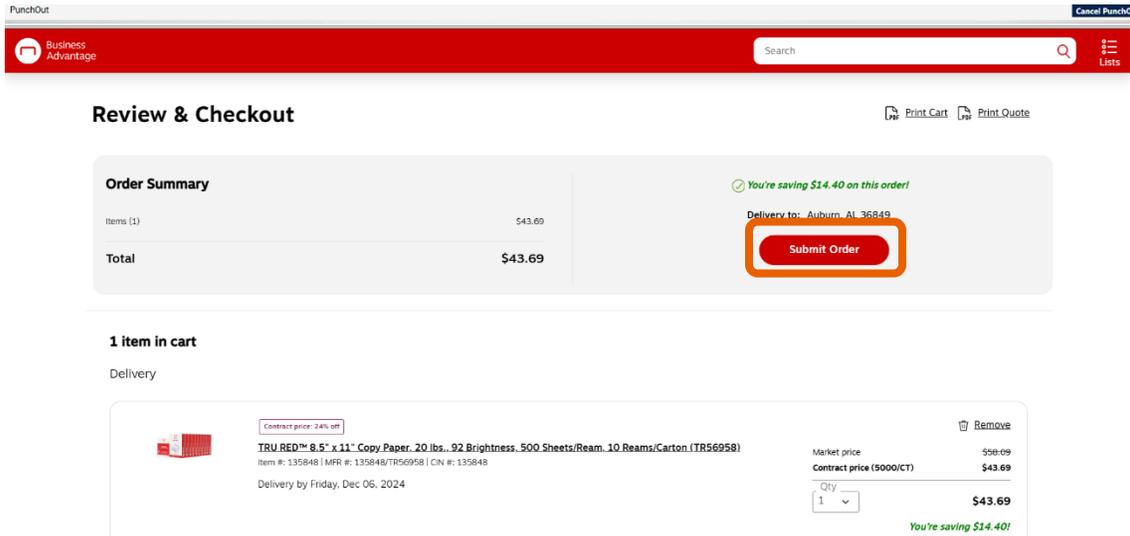
Punch-Out Suppliers/Online Ordering



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.



- 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

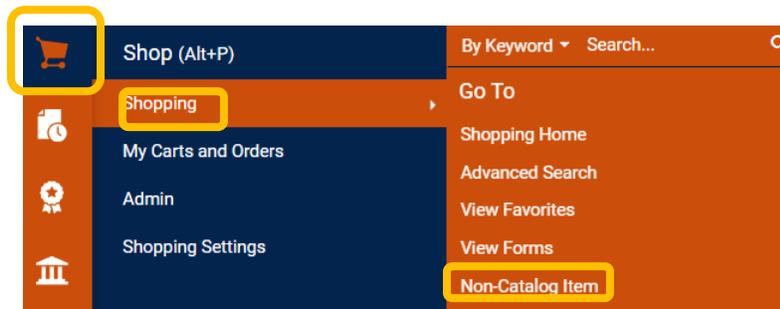
Target Audience: **Requisitioner**

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 cannot 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.

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



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

- 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.

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

- 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**.

Add Non-Catalog Item ✕

Existing Supplier

Wreck-It Ralph ✕ Q Wreck-It Ralph ✕

Fulfillment Address ▼ **Distribution Methods** ▶

VO Vendor-Order (Use for PO) 2 - 576 Breakdown Lane, Opelika, Alabama 36804 United States

VO Vendor-Order (Use for PO) 1 - 1234 Main St., Opelika, Alabama 36804 United States

VO Vendor-Order (Use for PO) 3 - 123 Forest Lane, Arima, 30 Trinidad & Tobago

Item ▼

Product Description ▼	Catalog No.	Quantity ▼	Price Estimate	Packaging
Blocks <small>248 characters remaining</small>		1	50.00 USD	Each ▼

Additional Details ▶

★ Required fields Save Save And Add Another Close

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

ⓘ All ▼ Search (Alt+Q) Q 0.00 USD 

My Cart

There are no items in your cart

View My Cart

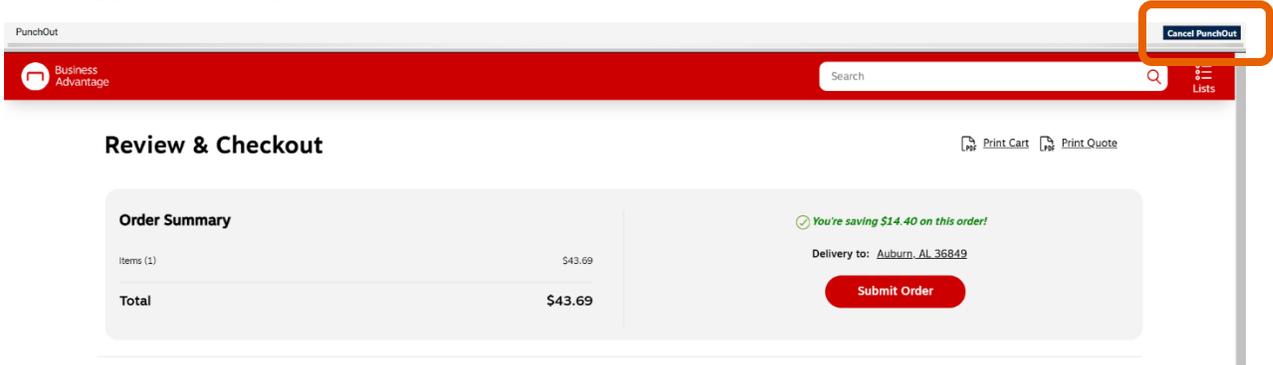
Checkout

0.00 USD

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.

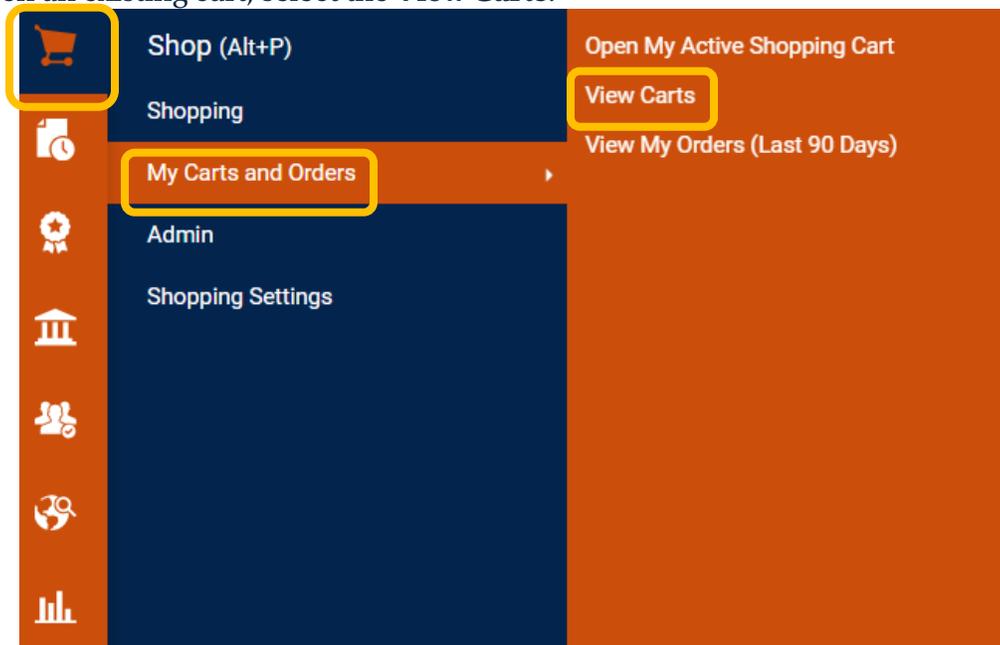


2.5 Assigning Shopping Cart to Requisitioner

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.

Cart Management Create Cart ?

Draft Carts ▾ Assigned Carts

> Filter Draft Carts

Type ▾	Shopping Cart Name ▾	Cart Description	Date Created ▾	Total ▾	Action
Normal	Active 2024-12-05 tah0026 01		12/5/2024	38.72 USD	View ▾

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

Shopping Cart • Shopping Cart Assign Cart Proceed To Checkout

Simple Advanced

Search for products, suppliers, forms, part number, etc. 🔍

Cart Name: 2024-12-05 tah0026 01

Description:

Accounting Date: mm/dd/yyyy

AIM Reference No.:

Campus: AU ▾

Summary

Details

For: Tonya Hollis

Total (38.72 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal ★	38.72
Tax1	0.00
Tax2	0.00
Shipping	0.00
Handling	0.00
Total ★	38.72

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.

Assign Cart: User Search ✕

Assign Cart To: *no value* **SELECT** ▾ or **SEARCH**

Note To Assignee:

Assign

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

Assign Cart: User Search ✕

Assign Cart To: *no value*
SELECT ▼ or **SEARCH**

Note To Assignee:

Assign

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

User Search ✕

Last Name ⓘ

First Name ⓘ

User Name ⓘ

Email ⓘ

Business Unit ⓘ

Department ⓘ

Role ⓘ

Results Per Page

Search

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

User Search				
New Search				
Name ↑	User Name	Email	Phone	Action
Pike, Matthew	pikemat	pikemat@auburn.edu	+1 334-844-3630	

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

Assign Cart: User Search 

Assign Cart To: **Pike, Matthew**
[SELECT](#) ▼ or [SEARCH](#)

Note To Assignee:

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

 **Cart Assigned**

Requisition Summary		Options
Requisition number	4178088	Create new draft cart
Cart name	2024-12-05 tah0026 01	Recent orders
Requisition total	38.72 USD	Return to your home page
Number of line items	2	

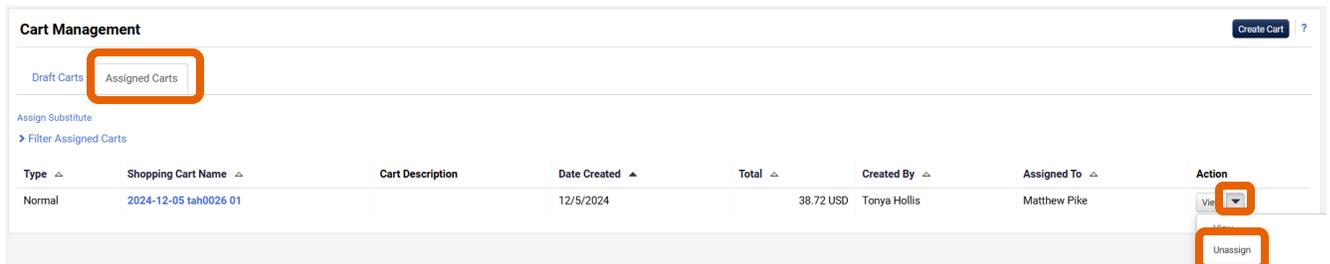
2.6 Unassigning Shopping Cart to Requisitioner

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**.

A screenshot of the 'Cart Management' interface. At the top, there are two tabs: 'Draft Carts' and 'Assigned Carts', with 'Assigned Carts' selected and highlighted with a yellow box. Below the tabs, there are links for 'Assign Substitute' and 'Filter Assigned Carts'. A table displays the assigned carts with columns for Type, Shopping Cart Name, Cart Description, Date Created, Total, Created By, Assigned To, and Action. The first row shows a 'Normal' cart with ID '2024-12-05 tah0026 01', created on 12/5/2024, with a total of 38.72 USD, created by Tonya Hollis, and assigned to Matthew Pike. The 'Action' column for this row has a dropdown menu with 'View' selected and 'Unassign' highlighted with a yellow box.

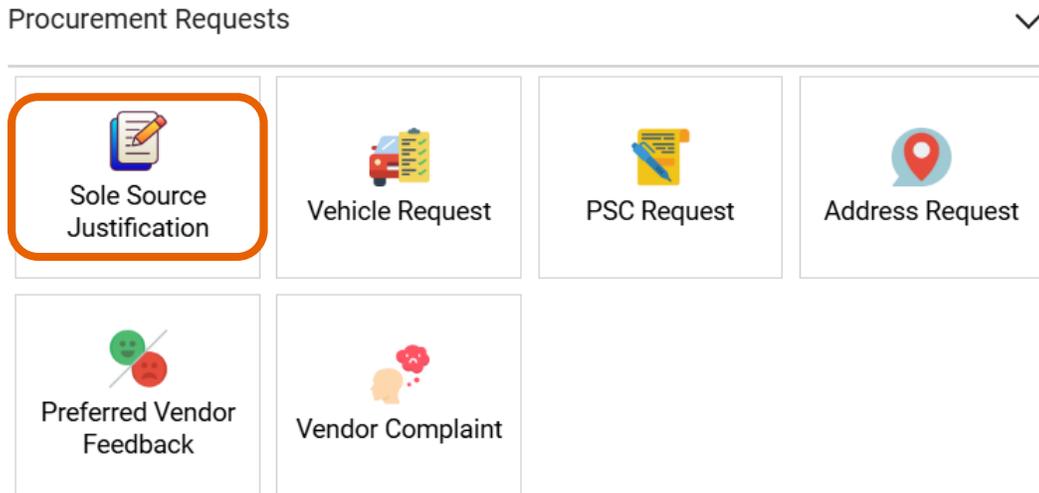
Type	Shopping Cart Name	Cart Description	Date Created	Total	Created By	Assigned To	Action
Normal	2024-12-05 tah0026 01		12/5/2024	38.72 USD	Tonya Hollis	Matthew Pike	View Unassign

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**.

The screenshot shows the 'Sole Source Justification' form. On the left is a sidebar with a navigation menu: 'Sole Source Justification', 'Form Number 1044967', 'Purpose Procurement Request', 'Status Incomplete', 'Instructions', 'Suppliers', 'Attachments', 'Form Fields', and 'Review and Submit'. The main content area is titled 'Instructions' and contains a paragraph of text starting with 'Pursuant to Section 41-16-51 of the Alabama Code...'. A 'Next >' button is highlighted with an orange border in the bottom right corner.

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

The screenshot shows the 'Sole Source Justification' form at the 'Suppliers' step. The sidebar on the left has 'Suppliers' selected. The main content area is titled 'Suppliers' and contains a search box for 'Registered Suppliers'. The search box contains the text 'Wreck it Ralph' and is highlighted with an orange border. Below the search box is a 'Zip Code' field with a dropdown menu set to 'Within 5 Miles'. A 'Search' button with a magnifying glass icon is highlighted with an orange border. At the bottom right, there are 'Previous' and 'Next >' buttons, with the 'Next >' button also highlighted with an orange border.

- 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**.

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

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

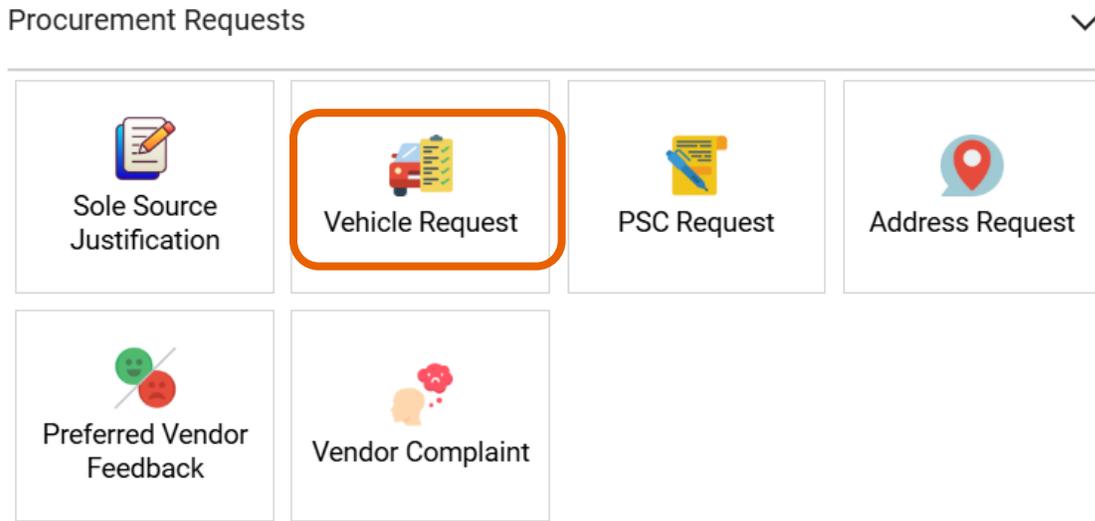
2.8 Creating a Cart from a Vehicle Request Form

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**.

The screenshot shows the 'AU - Vehicle Request Form' page. The left sidebar has a 'Next >' button highlighted with an orange border. The main content area shows 'Instructions' with a warning icon and a text block: 'By submitting this form, you are acknowledging that you are aware of the requirements within Auburn University's Fleet Safety Policy and ensuring that any driver of this vehicle will comply with the requirements of the policy.'

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

The screenshot shows the 'AU - Vehicle Request Form' page at the 'Suppliers' step. The left sidebar has a 'Next >' button highlighted with an orange border. The main content area shows a search box for 'Supplier' with a placeholder 'Please select a fulfillment center below.' and a 'Search Registered Suppliers' section with a search input field, a 'Zip Code' field, and a 'Within 5 Miles' dropdown. A 'Search' button is visible.

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

AU - Vehicle Request Form

Form Number 1044989
Purpose Procurement Request
Status Incomplete

Instructions
Details ✓
Suppliers ▲

Attachments ✓

Form Fields ▲
Review and Submit

Attachments

Please add your attachments below.

Add Attachment

Request Actions | History ?

Previous Save Progress **Next**

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

AU - Vehicle Request Form

Form Number 1044989
Purpose Procurement Request
Status Incomplete

Instructions
Details ✓
Suppliers ▲
Attachments ✓

Form Fields ▲
Review and Submit

Form Fields - Page 1

On This Page
General Information (10)
Vehicle Justification (6)

General Information

Date of Request *
12/05/2024
mm/dd/yyyy

Department Name *
1

Contact Name *
2

Contact Phone *
333-444-5555

Request Actions | History ?

★ Response Is Required
🔍 Field Name Is Searchable

Previous Save Progress **Next**

Scroll down for the rest of the form.

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

AU - Vehicle Request Form

Form Number 1044989
Purpose Procurement Request
Status Incomplete

Instructions
Details ✓
Suppliers ✓
Attachments ✓
Form Fields ✓

Review and Submit

Request Actions | History ?

Required Fields Complete

Section	Progress
Details	✓ Required Fields Complete
Suppliers	✓ Required Fields Complete
Attachments	✓ Required Fields Complete
Form Fields	✓ Required Fields Complete

Previous Add to Favorites **Add and go to Cart**

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

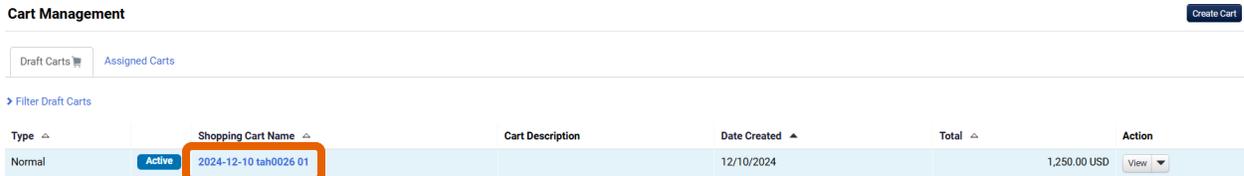
3.0 Modifying Draft Shopping Carts

Target Audience: **Requisitioner**

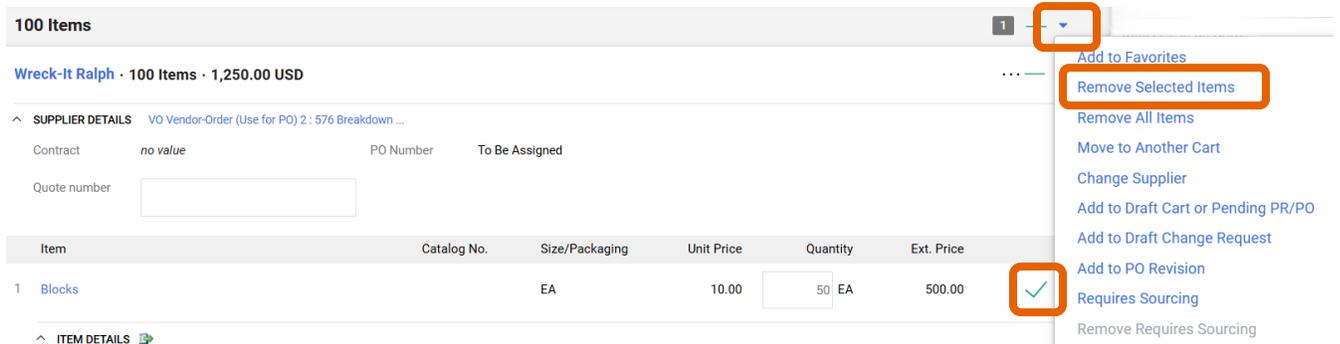
1. Once logged into TigerBuy, click the  icon in the left-hand navigation bar, select **My Carts and Orders**, and **View Carts**.



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**.



- 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.

Shopping Cart • Shopping Cart

SUPPLIER DETAILS VO Vendor Order (Use for PO) 2 : 576 Breakdown ...

Contract no value PO Number To Be Assigned

Quote number

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1 Safety Goggles		EA	10.00	50 EA	500.00	<input type="checkbox"/>
ITEM DETAILS <p>Contract: Select price or contract...</p> <p>Internal Note <input type="text"/></p> <p>1000 characters remaining expand clear</p> <p>External Note <input type="text"/></p> <p>1000 characters remaining expand clear</p>						
2 Hard Hats		EA	25.00	50 EA	1,250.00	<input type="checkbox"/>
ITEM DETAILS <p>Contract: Select price or contract...</p> <p>Internal Note <input type="text"/></p> <p>1000 characters remaining expand clear</p>						

Summary

Details

For Tonya Hollis

Total (1,750.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal *	1,750.00
Tax1	0.00
Tax2	0.00
Shipping	0.00
Handling	0.00
Total *	1,750.00

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

GER BUY

Shopping Cart • Shopping Cart

Simple Advanced

Search for products, suppliers, forms, part number, etc.

Cart Name: 2024-12-10 tah0026 01

Description:

Accounting Date: mm/dd/yyyy

AIM Reference No.:

Campus: AU

Business Purpose: Safety Notification

Summary

Details

For Tonya Hollis

Total (1,750.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

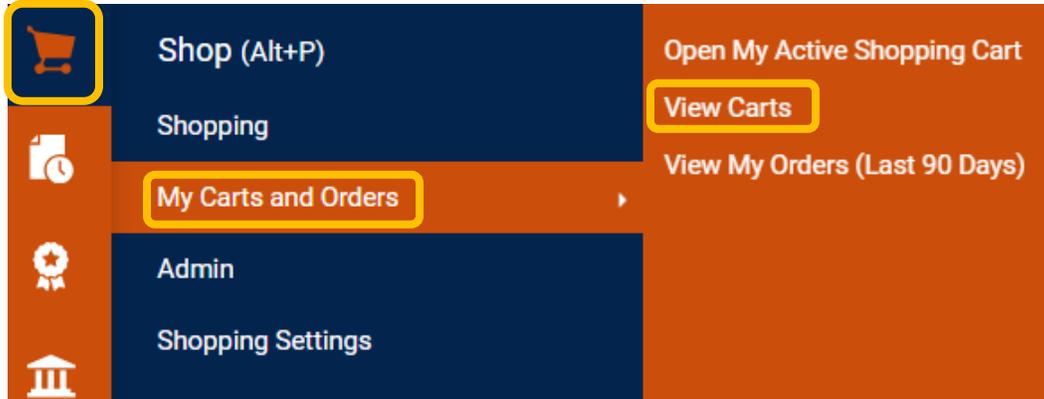
Subtotal *	1,750.00
Tax1	0.00
Tax2	0.00
Shipping	0.00
Handling	0.00
Total *	1,750.00

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.

Cart Management

Create Cart ?

Draft Carts  Assigned Carts

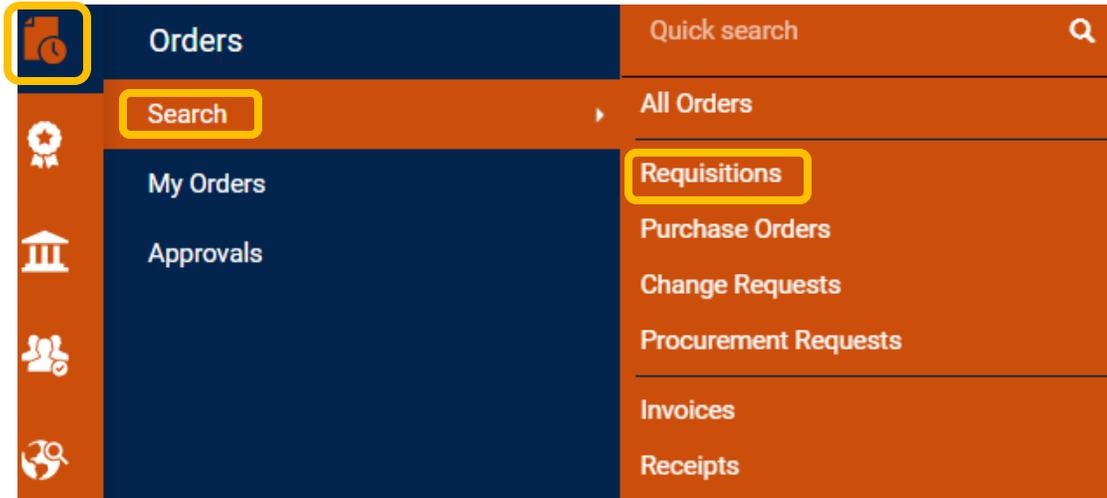
> Filter Draft Carts

Type 	Shopping Cart Name 	Cart Description	Date Created 	Total 	Action
Normal	Active 2024-12-10 tah0026 01		12/10/2024	1,750.00 USD	 View Delete

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.

Search Requisitions

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

1-14 of 14 Results | 20 Per Page

Requisition Number	Supplier	Requisition Name	Requisition Status	Prepared For	Submitted Date	Total Amount
<input type="checkbox"/> 4179208	Wreck-It Ralph	2024-12-09 tah0026 01	Completed	Tonya Hollis	12/9/2024 1:58:03 PM	1,250.00 USD
<input type="checkbox"/> 4174914	Wreck-It Ralph	2024-12-03 pikemat 02	Completed	Matthew Pike	12/3/2024 2:37:41 PM	100.00 USD
<input type="checkbox"/> 4174841	Wreck-It Ralph	2024-12-03 pikemat 01	Completed	Matthew Pike	12/3/2024 11:01:44 AM	100.00 USD
<input type="checkbox"/> 4166000	Wreck-It Ralph	2024-11-19 pikemat 01	Completed	Matthew Pike	11/19/2024 2:54:30 PM	5,500.00 USD
<input type="checkbox"/> 4164573	Wreck-It Ralph	2024-11-14 pikemat 02	Completed	Matthew Pike	11/14/2024 1:32:44 PM	5,500.00 USD
<input type="checkbox"/> 4164549	Wreck-It Ralph	2024-11-14 pikemat 01	Completed	Matthew Pike	11/14/2024 1:26:44 PM	5,500.00 USD
<input type="checkbox"/> 4152751	Wreck-It Ralph	2024-10-31 pikemat 01	Completed	Tonya Hollis	10/31/2024 10:00:48 AM	5,497.50 USD
<input type="checkbox"/> 4151482	Wreck-It Ralph	2024-10-30 pikemat 03	Completed	Tonya Hollis	10/30/2024 12:51:47 PM	5,497.50 USD
<input type="checkbox"/> 4151369	Stuff's Stuff	2024-10-30 pikemat 02	Completed	Matthew Pike	10/30/2024 12:10:46 PM	5,000.00 USD

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

The screenshot shows a requisition summary page for requisition 4179208. The 'Requisition' dropdown menu is highlighted with an orange box. A secondary dropdown menu is open, showing the 'Copy to New Cart' option, which is also highlighted with an orange box. The page displays details for General, Shipping, and Billing sections. The Summary sidebar on the right shows a total of 1,250.00 USD and includes options like 'View My Orders (Last 90 Days)' and 'Continue Shopping'.

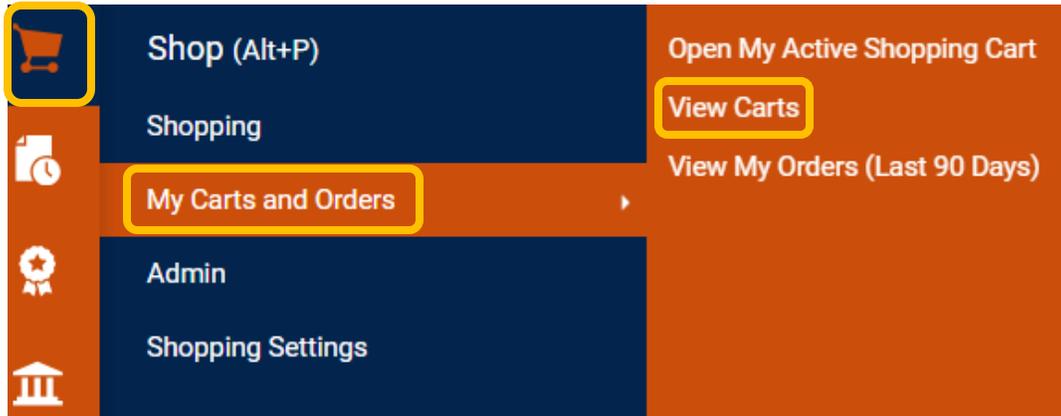
4. A new cart will be created with the items purchased from the previous requisition. If desired, enter a **Cart Name** for this cart. Any changes will be automatically saved.

The screenshot shows a new cart creation page. The 'Cart Name' field is highlighted with an orange box and contains the text 'Requisition Copy Cart'. The page includes a search bar, a search icon, and various input fields for Description, Accounting Date, AIM Reference No., Campus (set to AU), and Business Purpose (set to Construction Project). The Summary sidebar on the right shows a total of 1,250.00 USD and includes a 'Details' section.

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.

Cart Management Create Cart ?

[Draft Carts](#) **Assigned Carts**

[Assign Substitute](#)
[Filter Assigned Carts](#)

Type	Shopping Cart Name	Cart Description	Date Created	Total	Created By	Assigned To	Action
Normal	2024-12-10 pikemat 01		12/10/2024	2,995.00 USD	Matthew Pike	Tonya Hollis	View

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

Elmo's Brushes · 500 Items · 2,995.00 USD

⋮

[Add Discount](#)
[Add Non-Catalog Item](#)

^ SUPPLIER DETAILS

Contract *no value* PO Number To Be Assigned

Quote number

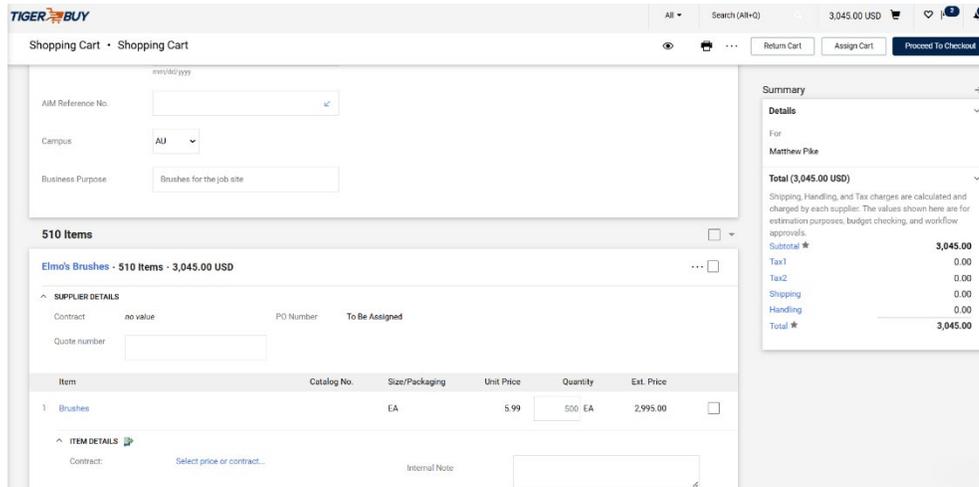
Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1 Brushes		EA	5.99	<input type="text" value="500"/> EA	2,995.00	<input type="checkbox"/>

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

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

- 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.



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.

Elmo's Brushes · 510 Items · 3,045.00 USD

... [Add to Favorites](#)
[Remove Selected Items](#)
[Remove All Items](#)
[Move to Another Cart](#)
[Change Supplier](#)
[Add to Draft Cart or Pending PR/PO](#)
[Add to Draft Change Request](#)
[Add to PO Revision](#)
[Requires Sourcing](#)
[Remove Requires Sourcing](#)

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 Brushes		EA	5.99	500 EA	2,995.00

ITEM DETAILS

Contract: [Select price or contract...](#)

Internal Note: 1000 characters remaining [expand](#) | [clear](#)

External Note: 1000 characters remaining [expand](#) | [clear](#)

3.5 Proceeding to Checkout

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**.

Shop (Alt+P) [Open My Active Shopping Cart](#)

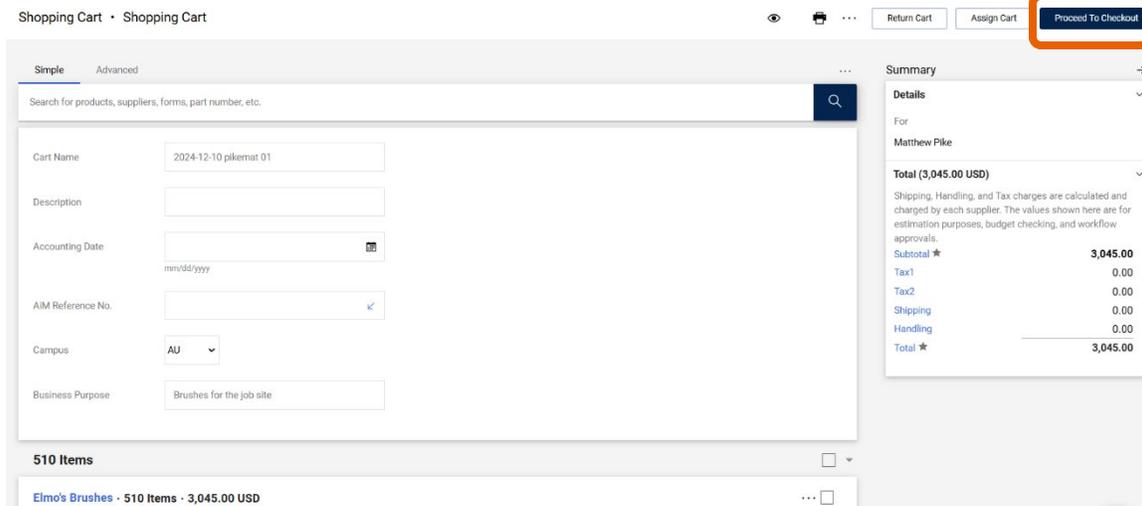
Shopping [View Carts](#)

My Carts and Orders [View My Orders \(Last 90 Days\)](#)

Admin

Shopping Settings

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

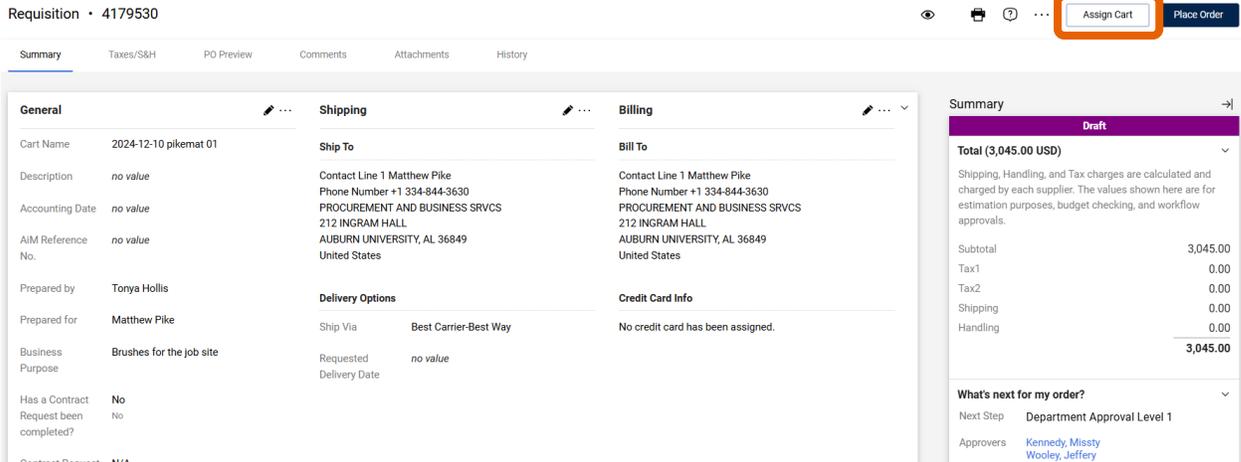


3. In a requisition, various details such as a shipping/billing address and accounting codes are associated with the order. When populating a cart, the default values from the user’s profile are used. The accounting codes used in the header will be applied to all line items. Please refer to Section 3.7B 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**.

Assign Cart: User Search ✕

Assign Cart To: *no value*
SELECT ▼ or **SEARCH**

Note To Assignee:

Assign **Close**

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

User Search ✕

Last Name ⓘ

First Name ⓘ

User Name ⓘ

Email ⓘ

Business Unit ⓘ 🔍

Department ⓘ

Role ⓘ

Results Per Page ▼

Search **Close**

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

User Search ×

New Search

Name ↑	User Name	Email	Phone	Action
Pike, Matthew	pikemat	@auburn.edu	+1 334-844-	+

Close

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

Assign Cart: User Search ×

Assign Cart To: **Pike, Matthew**
[SELECT](#) ▼ or [SEARCH](#)

Note To Assignee:

Assign Close

8. A confirmation page will appear.

✓ **Cart Assigned**

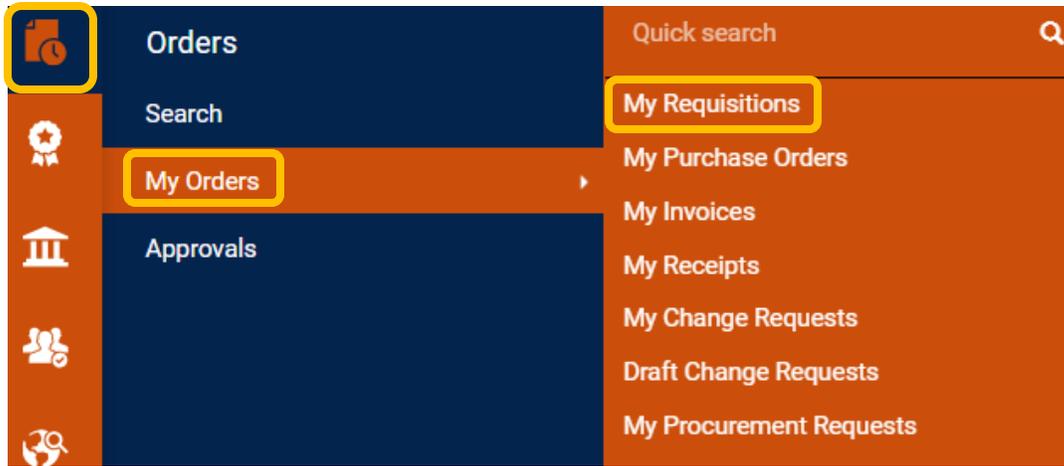
Requisition Summary		Options
Requisition number	4179530	Create new draft cart
Cart name	2024-12-10 pikemat 01	Recent orders
Requisition total	3,045.00 USD	Return to your home page
Number of line items	2	

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.

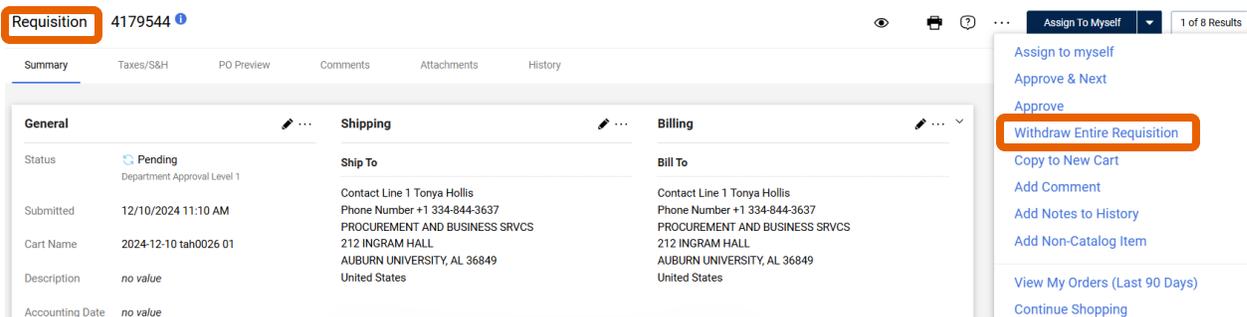
1. Select **Orders** from the left-hand navigation bar. Choose **My Orders**, then **My Requisitions**.



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

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

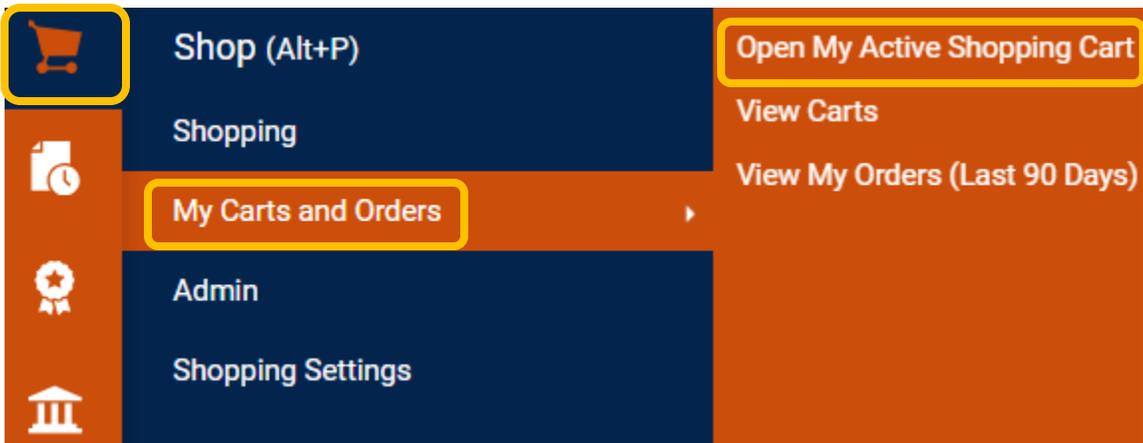
Header level accounting will be applied to each line of the requisition. If all line items on the requisition are to be paid from the same FOAP, the FOAP should be entered at the header level at the time of requisition creation.

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.

Cart Management Create Cart ?

Draft Carts Assigned Carts

Filter Draft Carts

Type	Shopping Cart Name	Cart Description	Date Created	Total	Action
Normal	Requisition Copy Cart		12/10/2024	1,250.00 USD	View

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

Shopping Cart • Shopping Cart

Assign Cart **Proceed To Checkout**

Simple Advanced

Search for products, suppliers, forms, part number, etc.

Cart Name: Requisition Copy Cart

Description:

Accounting Date: mm/dd/yyyy

Alt Reference No.:

Campus: AU

Business Purpose: Construction Project

Summary

Details

For: Tonya Hollis

Total (1,250.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal *	1,250.00
Tax1	0.00
Tax2	0.00
Shipping	0.00
Handling	0.00
Total *	1,250.00

100 Items

Wreck-It Ralph • 100 Items • 1,250.00 USD

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.

Accounting Codes 

Chart	Bank Code	Fund	Fund - Banner	Fund Type	Organization	Account	Program	Activity
A Auburn University	05 Bank Code for Chart A	101001-A AU Unrestricted Base Budget	101001 AU Unrestricted Base Budget	1A 1A	113600-A Procurement and Business Services	70935-A Office Supplies	7000-A Institutional Support expense	no value

Internal Notes and Attachments  External Notes and Attachments 

Internal Notes: no value

Internal Attachments: [Add](#)

Note to all Suppliers: no value

Attachments for all suppliers: [Add](#)

PO Clauses: [1 Edit | View details](#)

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

100 Items

Wreck-It Ralph • 100 Items • 1,250.00 USD

^ SUPPLIER DETAILS VO Vendor-Order (Use for PO) 2 : 576 Breakdown ...

Contract: no value PO Number: To Be Assigned

Quote number: no value PO Clauses: [Add/View](#)

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 Blocks		EA	10.00	50 EA	500.00
^ ITEM DETAILS 					
Contract: no value		Internal Note: no value			
		Internal Attachments: Add			
		External Note: no value			
		Attachments for supplier: Add			
2 Construction Hats		EA	15.00	50 EA	750.00

Override

- Supplier
- General
- Ship To
- Delivery Options
- Bill To
- Credit Card Info
- Accounting Codes**
- Remove
- Requires Sourcing
- Remove Requires Sourcing
- Add Discount
- Add to Favorites
- Move to Another Cart
- Add to Draft Cart or Pending PR/PO
- Add to Draft Change Request
- Add to PO Revision

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

Override Line 1: Accounting Codes

Chart ★ Bank Code Fund ★ Fund - Banner Fund Type Organization ★ Account ★ Program ★

A 05 101001-A 101001 1A-1A 113600-A 70935-A 7000-A

★ Required fields Save Close

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.**

Blocks EA 10.00 50 EA 500.00

ITEM DETAILS

Contract: no value Internal Note: no value
 Internal Attachments: Add
 External Note: no value
 Attachments for supplier: Add

ACCOUNTING CODES Values have been overridden for this line

Chart	Bank Code	Fund	Fund - Banner	Fund Type	Organization	Account	Program	Activity	% of Price
A Auburn University	05 Bank Code for Chart A	101001-A AU Unrestricted Base Budget	101001 AU Unrestricted Base Budget	1A 1A	113600-A Procurement and Business Services	70935-A Office Supplies	7000-A Institutional Support expense	no value	50%
A Auburn University	05 Bank Code for Chart A	101001-A AU Unrestricted Base Budget	101001 AU Unrestricted Base Budget	1A 1A	113600-A Procurement and Business Services	71000-A Non-Capital Computer Equipment	7000-A Institutional Support expense	no value	50%

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

✓ Requisition 4179435 Submitted

Summary

Requisition number	4179435
Requisition status	Pending
Cart name	Requisition Copy Cart
Requisition date	12/10/2024
Requisition total	1,250.00 USD
Number of line items	2

Options

- Print
- Recent orders
- Return to your home page

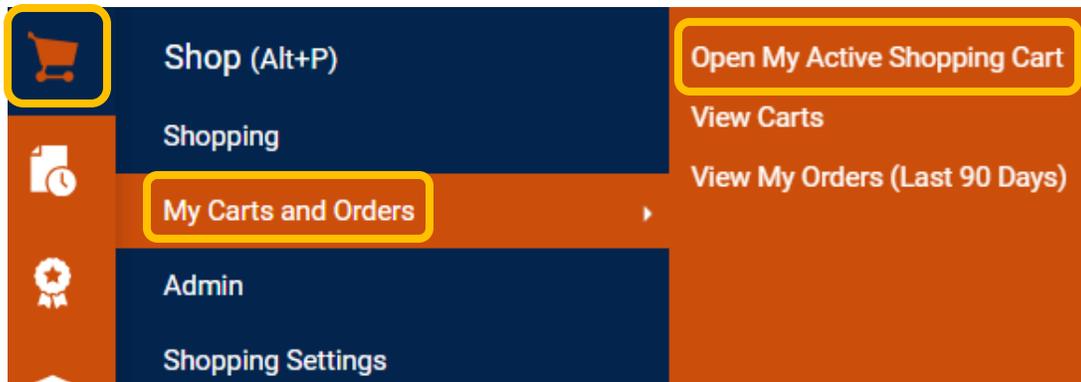
3.8 Adding Notes and Attachments

Target Audience: **Requisitioner**

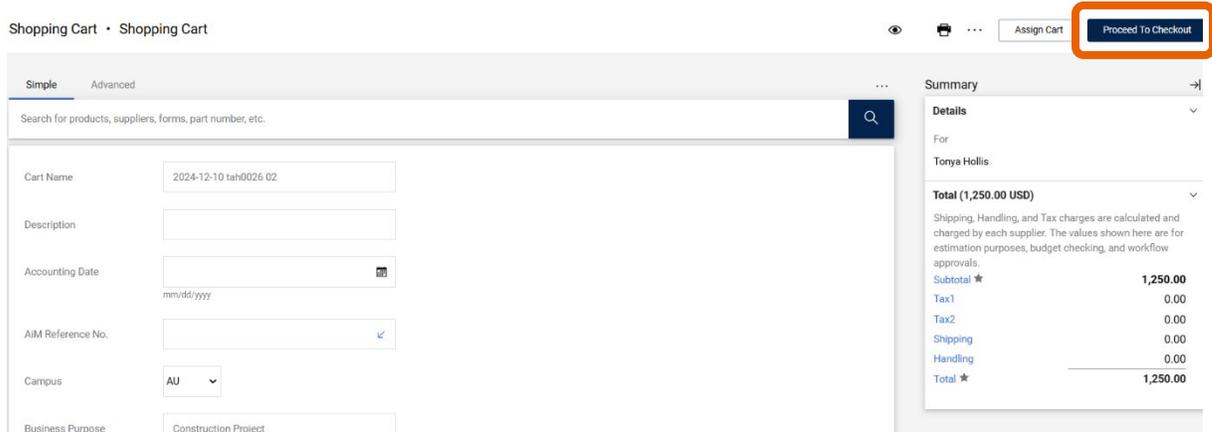
Users can add internal and external notes to the requisition. Users can also include attachments in various formats. Internal notes/attachments are not sent on to suppliers; they are available to approvers. External notes/attachments are sent to the supplier.

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.



- 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**.

Internal Notes and Attachments		External Notes and Attachments	
Internal Notes	<i>no value</i>	Note to all Suppliers	<i>no value</i>
Internal Attachments	Add	Attachments for all suppliers	Add
		PO Clauses	1 Edit View details

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

Edit Internal Notes And Attachments
✕

Internal Note

Internal Notes

Test

996 characters remaining [expand](#) | [clear](#)

Save

Close

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

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price																	
1 Blocks		EA	10.00	50 EA	500.00	... <input type="checkbox"/>																
<div style="display: flex; justify-content: space-between; align-items: center; margin-top: 10px;"> ^ ITEM DETAILS </div> <table style="width: 100%; border-collapse: collapse; margin-top: 5px;"> <tr> <td style="width: 30%;">Contract:</td> <td style="width: 30%;"><i>no value</i></td> <td style="width: 30%;">Internal Note</td> <td style="width: 10%;"><i>no value</i></td> </tr> <tr> <td></td> <td></td> <td>Internal Attachments</td> <td>Add</td> </tr> <tr> <td></td> <td></td> <td>External Note</td> <td><i>no value</i></td> </tr> <tr> <td></td> <td></td> <td>Attachments for supplier</td> <td>Add</td> </tr> </table>							Contract:	<i>no value</i>	Internal Note	<i>no value</i>			Internal Attachments	Add			External Note	<i>no value</i>			Attachments for supplier	Add
Contract:	<i>no value</i>	Internal Note	<i>no value</i>																			
		Internal Attachments	Add																			
		External Note	<i>no value</i>																			
		Attachments for supplier	Add																			

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

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 Blocks		EA	10.00	50 EA	500.00

ITEM DETAILS	
Contract:	no value
Internal Note	no value
Internal Attachments	Add
External Note	no value
Attachments for supplier	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**.

Add Attachments ✕

Attachment Type **File** Link

File(s) ★

Drop File or [Browse](#)
Max. File Size: 20.0 MB

TEST.docx ✔ 🗑️

★ Required fields

Save Changes
Close

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

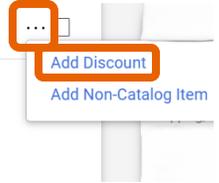
1. To add a discount at the header level, click the **Supplier Actions button (...)** on the supplier line and select **Add Discount**.

Wreck-It Ralph · 100 Items · 1,250.00 USD

^ SUPPLIER DETAILS VO Vendor-Order (Use for PO) 2 : 576 Breakdown ...

Contract no value PO Number To Be Assigned

Quote number



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

Add Discount ×

Supplier Wreck-It Ralph

Applies to Line(s) 1 - 2

Applied to Subtotal 1,250.00 USD

Apply Discount ★ Before Tax Calculations (standard) ▾

Discount Percentage Amount

25.00 %

[Preview Calculations](#)

Apply Close

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

Draft	
Total (937.50 USD)	▼
Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.	
Subtotal	1,250.00
Tax1	0.00
Tax2	0.00
Shipping	0.00
Handling	0.00
Discount	-312.50
	937.50



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**.

The screenshot shows a procurement system interface. At the top, there are 'SUPPLIER DETAILS' for 'VO Vendor-Order (Use for PO) 2: 576 Breakdown ...'. Below this is a table with columns: Item, Catalog No., Size/Packaging, Unit Price, Quantity, and Ext. Price. Two items are listed: '1 Blocks' and '2 Construction Hats'. To the right of the table, a dropdown menu is open, showing various actions. The 'Add Discount' option is highlighted with an orange box.

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 Blocks		EA	10.00	50 EA	500.00
2 Construction Hats		EA	15.00	50 EA	750.00

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

The screenshot shows the 'Add Discount' dialog box. It has a title bar 'Add Discount' with a close button. The 'Supplier' is 'Wreck-It Ralph'. 'Applies to Line(s)' is '1'. 'Applied to Subtotal' is '500.00 USD'. Under 'Apply Discount', a dropdown menu is set to 'Before Tax Calculations (standard)'. Under 'Discount', the 'Amount' radio button is selected. A text input field contains '25.00' and 'USD'. Below the input field is a 'Preview Calculations' link. At the bottom, there are 'Apply' and 'Close' buttons.

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

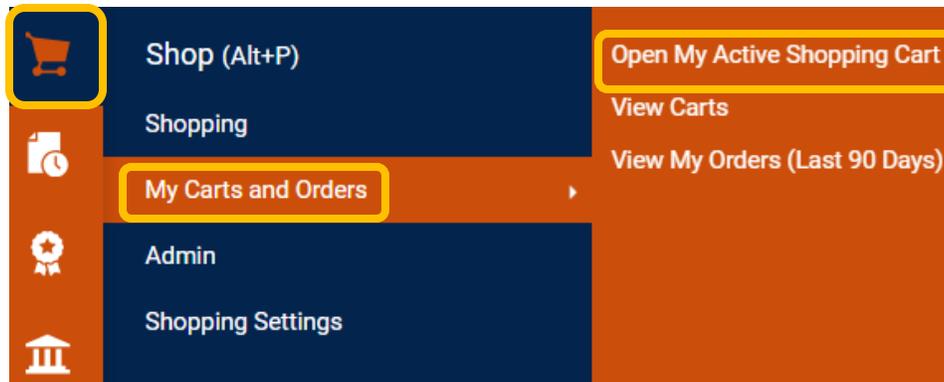
Draft	
Total (1,225.00 USD)	▼
Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.	
Subtotal	1,250.00
Tax1	0.00
Tax2	0.00
Shipping	0.00
Handling	0.00
Discount	-25.00
	1,225.00

3.10 Adding Comments

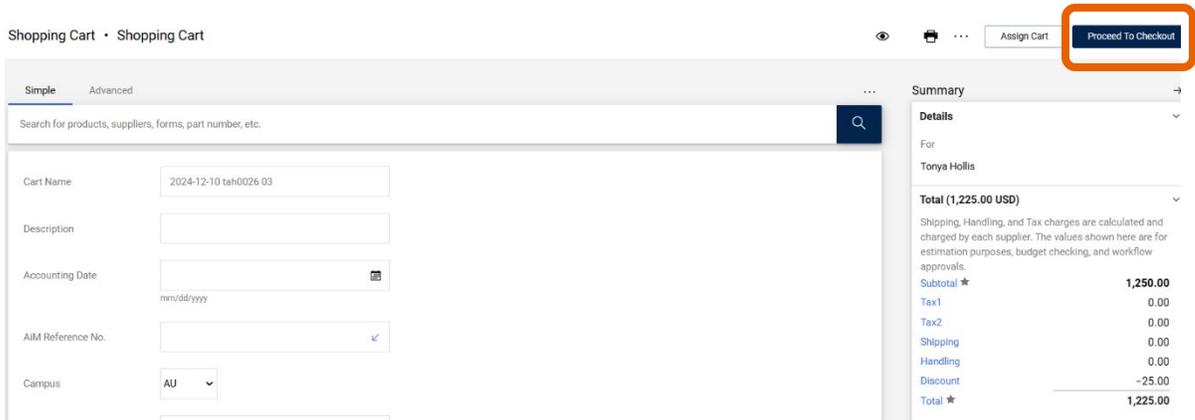
Target Audience: **Requisitioner**

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.

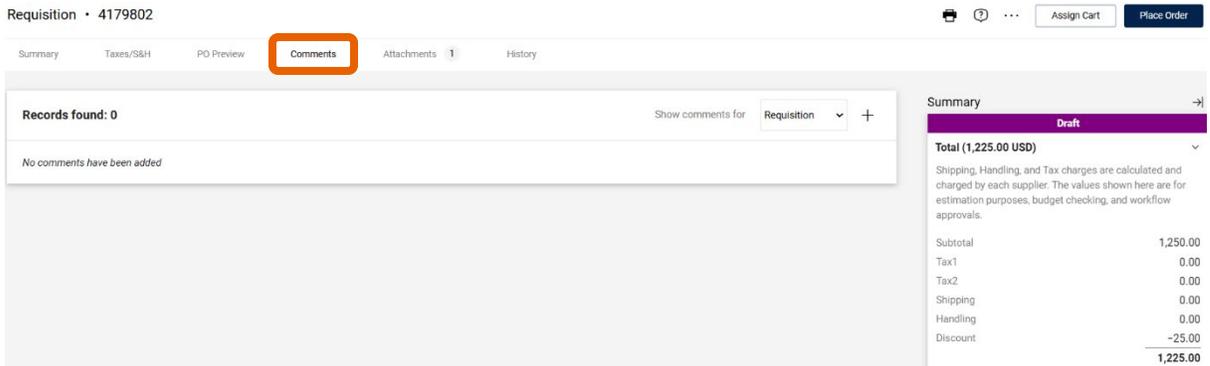
- Click the  icon in the left-hand navigation bar, select **My Carts and Orders** and **Open My Active Shopping Cart**.



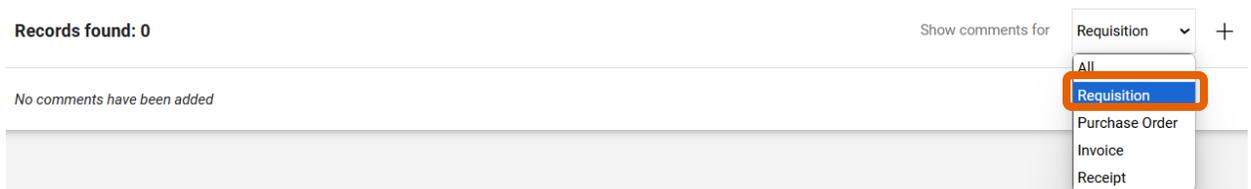
2. Select the **Proceed to Checkout** button.



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.

Records found: 0 Show comments for Requisition ▾ +

ADD COMMENT✓✕

1000 characters remaining expand | clear

Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

This will add a comment to the document.

Attach file (optional)

Attachment Type

File

Link/URL

File Name

File

Choose FileUpload your file

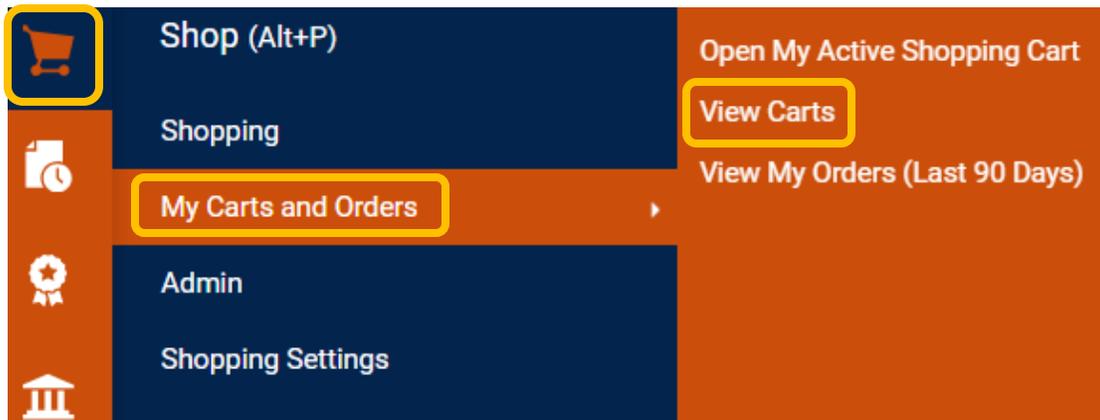
No comments have been added

3.11 Editing Returned Requisitions

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.

Cart Management Create Cart

Draft Carts Assigned Carts

> Filter Draft Carts

Type	Shopping Cart Name	Cart Description	Date Created	Total	Action
Normal - Returned	2024-12-10 tah0026 01		12/10/2024	1,250.00 USD	View
Normal	2024-12-10 tah0026 02		12/10/2024	937.50 USD	View
Normal	2024-12-10 tah0026 03		12/10/2024	1,250.00 USD	View

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

Shopping Cart • Shopping Cart Assign Cart **Proceed To Checkout**

Simple Advanced

Search for products, suppliers, forms, part number, etc.

Cart Name:

Description:

Accounting Date:

AIM Reference No.:

Campus:

Summary

Details

For: Tonya Hollis

Total (1,225.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal *	1,250.00
Tax1	0.00
Tax2	0.00
Shipping	0.00
Handling	0.00
Discount	-25.00
Total *	1,225.00

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

✓
Cart Assigned

Requisition Summary

Requisition number	4179754
Cart name	2024-12-10 tah0026 02
Requisition total	937.50 USD
Number of line items	2

Options

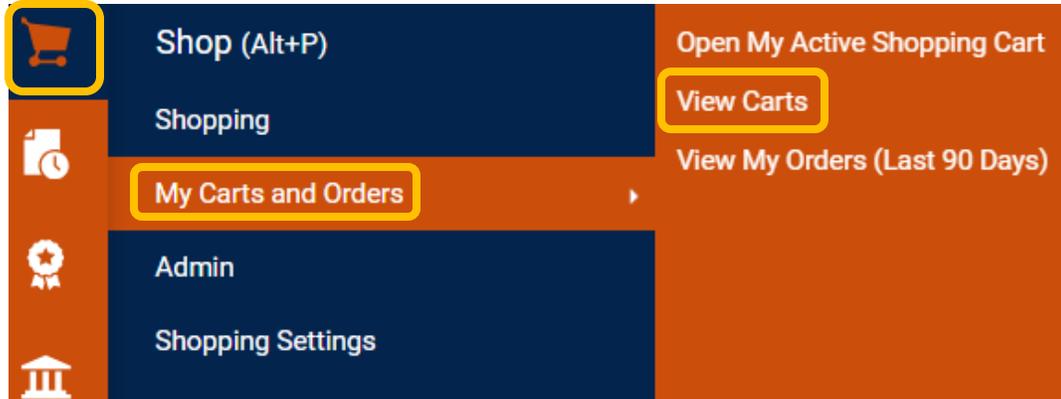
- [Create new draft cart](#)
- [Recent orders](#)
- [Return to your home page](#)

3.12 Previewing Requisition Workflow and Purchase Orders

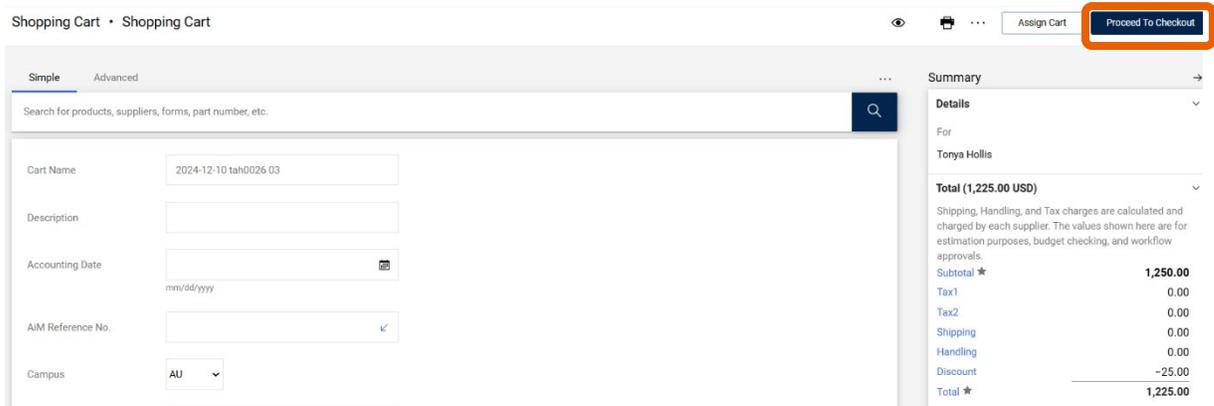
Target Audience: **Requisitioner**

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.



- Users can edit the 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.

Summary →

What's next for my order? ▾

Next Step Department Approval Level 1

Approvers [Kennedy, Missy](#)
[Wooley, Jeffery](#)
[Yarbrough, Virginia](#)

Workflow ...

Show skipped steps

- Draft**
Active
Tonya Hollis
- Initial Banner Budget Auth
Future
- Department Approval Level 1
Future
- Final Banner Budget Auth
Future
- Create PO
Future

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

Requisition • 4179802

Summary Taxes/S&H **PO Preview** Comments Attachments 1 History

Preview PO 1 PO Number To Be Assigned

Wreck-It Ralph • 100 Items • 1,250.00 USD

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 Blocks		EA		10.00	50 EA 500.00 -25.00 USD
2 Construction Hats		EA		15.00	50 EA 750.00

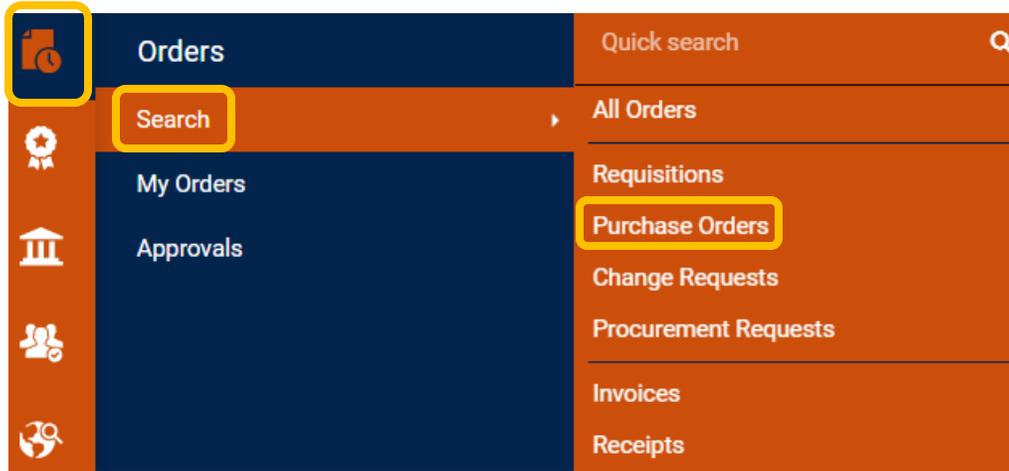
Tax1	0.00
Tax2	0.00
Shipping	0.00
Handling	0.00
Discount	-25.00
Total ★	1,225.00 USD

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.

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	Stuff'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.

Purchase Order · Wreck-It Ralph · P0082137 Revision 0

Status **Summary** Revisions 1 Confirmations Shipments Change Requests Receipts Invoices Comments Attach

General Information	Shipping Information	Billing/Payment
PO/Reference No. P0082137	Ship To	Bill To
Revision No. 0	Contact Line 1 Tonya Hollis Phone Number +1 334-844-3637 PROCUREMENT AND BUSINESS SRVCS 212 INGRAM HALL AUBURN UNIVERSITY, AL 36849 United States	Contact Line 1 Tonya Hollis Phone Number +1 334-844-3637 PROCUREMENT AND BUSINESS SRVCS 212 INGRAM HALL AUBURN UNIVERSITY, AL 36849 United States
Total 1,250.00	ShipTo Address ING212 Code	BillTo Address ING212 Code
AIM Reference No. no value	Delivery Options	Billing Options
Purchase Order Date 12/9/2024	Expedite <input checked="" type="checkbox"/>	Accounting Date no value
Priority Normal	Ship Via Best Carrier-Best Way	Payment Terms
Requisition Number 4179208 view print	Requested Delivery Date no value	F.O.B. Destination
Supplier Name Wreck-It Ralph	PO Clauses 1 Edit View details	
Address 576 Breakdown Lane Opelika, Alabama 36804 United States		
Internal PO Ref #: 4184391		
Purchasing Category 116-Construction		

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

Purchase Order · Wreck-It Ralph · P0082137 Revision 0

Status **Summary** Revisions 1 Confirmations Shipments Change Requests Receipts Invoices Comments Attachments History

1 of 12 Results

General Information	Shipping Information	Billing/Payment	Summary
PO/Reference No. P0082137	Ship To	Bill To	Completed
Revision No. 0	Contact Line 1 Tonya Hollis Phone Number +1 334-844-3637 PROCUREMENT AND BUSINESS SRVCS 212 INGRAM HALL AUBURN UNIVERSITY, AL 36849 United States	Contact Line 1 Tonya Hollis Phone Number +1 334-844-3637 PROCUREMENT AND BUSINESS SRVCS 212 INGRAM HALL AUBURN UNIVERSITY, AL 36849 United States	Details
Total 1,250.00	ShipTo Address ING212 Code	BillTo Address ING212 Code	Supplier Status
AIM Reference No. no value	Delivery Options	Billing Options	Sent To Supplier
Purchase Order Date 12/9/2024	Expedite <input checked="" type="checkbox"/>	Accounting Date no value	Supplier
Priority Normal	Ship Via Best Carrier-Best Way	Payment Terms	Wreck-It Ralph
Requisition Number 4179208 view print	Requested Delivery Date no value	F.O.B. Destination	Total (1,250.00 USD)
Supplier Name Wreck-It Ralph	PO Clauses 1 Edit View details		Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.
Address 576 Breakdown Lane Opelika, Alabama 36804 United States			Subtotal 1,250.00
Internal PO Ref #: 4184391			Tax1 0.00
Purchasing Category 116-Construction			Tax2 0.00
			Shipping 0.00
			Handling 0.00
			1,250.00
			Related Documents
			Requisition: 4179208



Auburn University TigerBuy

Module 4: Status and Approval of Requisitions

4.0 Assigning Substitute Requisitioners

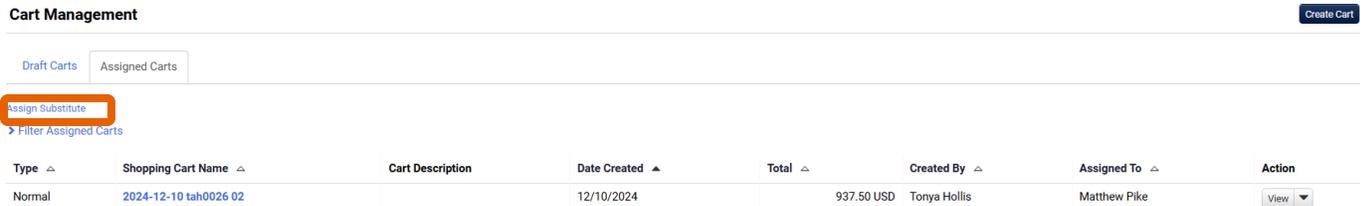
Target Audience: **Requisitioner**

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**.

User Search

Last Name 

First Name 

User Name 

Email 

Business Unit 

Department 

Role 

Results Per Page

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

New Search

Name ▲	User Name ▲	Email ▲	Phone	Action
Pike, Matthew		@auburn.edu	+1 334-844-	[select]

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

Cart Management Create Cart ?

Draft Carts Assigned Carts

Current Substitute: Matthew Pike End Substitution

Filter Assigned Carts

Type ▲	Shopping Cart Name ▲	Cart Description	Date Created ▲	Total ▲	Created By ▲	Assigned To ▲	Action
Normal	2024-12-10 tah0026 02		12/10/2024	937.50 USD	Tonya Hollis	Matthew Pike	View

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.

The screenshot shows the 'Requisitions to Approve' page. On the left, there are filters for 'Date Range' (All Dates), 'View Approvals For' (Matthew Pike (pikemat)), and a 'Suppliers' list. The main table displays the following data:

REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUISITIONER	AMOUNT	
<input type="checkbox"/> 3921336	MP's Transportation	Matthew Pike	12/14/2023 1:32 PM	Matthew Pike	1,025,000.00 USD	<input type="checkbox"/> <input type="checkbox"/> ✓
Requisition Name		Folders	365 Days in folder [My PR Approvals]			
No. of line Items		365 Days in folder [AU_Buyer_Approval_<\$15K]				
<input type="checkbox"/> 3804163	1 Company Test 2-K Steel Products, Inc.	Matthew Pike	8/15/2023 10:35 AM	Alicia Still	551,500.00 USD	<input type="checkbox"/> <input type="checkbox"/> ✓
Requisition Name		Folders	477 Days in folder [My PR Approvals]			
No. of line Items		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.

Requisition • 3921336

Summary Taxes/SSH PO Preview Comments 1 Attachments History

You are reviewing a requisition currently assigned to the approver Matthew Pike

General	Shipping	Billing
Status: Pending Buyer Approval (Matthew Pike)	Ship To: Contact Line 1 Matthew Pike Phone Number +1 334-844-3630 PROCUREMENT AND BUSINESS SRVCS 212 INGRAM HALL AUBURN UNIVERSITY, AL 36849 United States	Bill To: Contact Line 1 Matthew Pike Phone Number +1 334-844-3630 PROCUREMENT AND BUSINESS SRVCS 212 INGRAM HALL AUBURN UNIVERSITY, AL 36849 United States
Submitted: 12/14/2023 1:32 PM	Delivery Options: Values vary by line.	Credit Card Info: No credit card has been assigned.
Cart Name: Transit Services for Main Campus		
Description: no value		
Accounting Date: no value		
AIM Reference No.: no value		
Prepared by: Christalyn Thomas		
Prepared for: Matthew Pike		
Business Purpose: Test		
Has a Contract Request been completed?: No		
Contract Request: no value		

Summary Pending

Total (1,025,000.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	1,025,000.00
Tax1	0.00
Tax2	0.00
Shipping	0.00
Handling	0.00
Total	1,025,000.00

Related Documents
View Associated Sourcing Events

What's next?
Workflow ...

Show skipped steps

Submitted
12/14/2023 1:32 PM
Submitted - 12/14/2023 1:32 PM - Chris

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

Requisition • 3921336

Summary Taxes/SSH PO Preview Comments 1 Attachments History

You are reviewing a requisition currently assigned to the approver Matthew Pike

General	Shipping	Billing
Status: Pending Buyer Approval (Matthew Pike)	Ship To: Contact Line 1 Matthew Pike Phone Number +1 334-844-3630 PROCUREMENT AND BUSINESS SRVCS 212 INGRAM HALL AUBURN UNIVERSITY, AL 36849 United States	Bill To: Contact Line 1 Matthew Pike Phone Number +1 334-844-3630 PROCUREMENT AND BUSINESS SRVCS 212 INGRAM HALL AUBURN UNIVERSITY, AL 36849 United States
Submitted: 12/14/2023 1:32 PM	Delivery Options: Values vary by line.	Credit Card Info: No credit card has been assigned.
Cart Name: Transit Services for Main Campus		
Description: no value		
Accounting Date: no value		
AIM Reference No.: no value		
Prepared by: Christalyn Thomas		
Prepared for: Matthew Pike		
Business Purpose: Test		
Has a Contract Request been completed?: No		
Contract Request: no value		

Summary Pending

Total (1,025,000.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	1,025,000.00
Tax1	0.00
Tax2	0.00
Shipping	0.00
Handling	0.00
Total	1,025,000.00

Related Documents
View Associated Sourcing Events

What's next?
Workflow ...

Show skipped steps

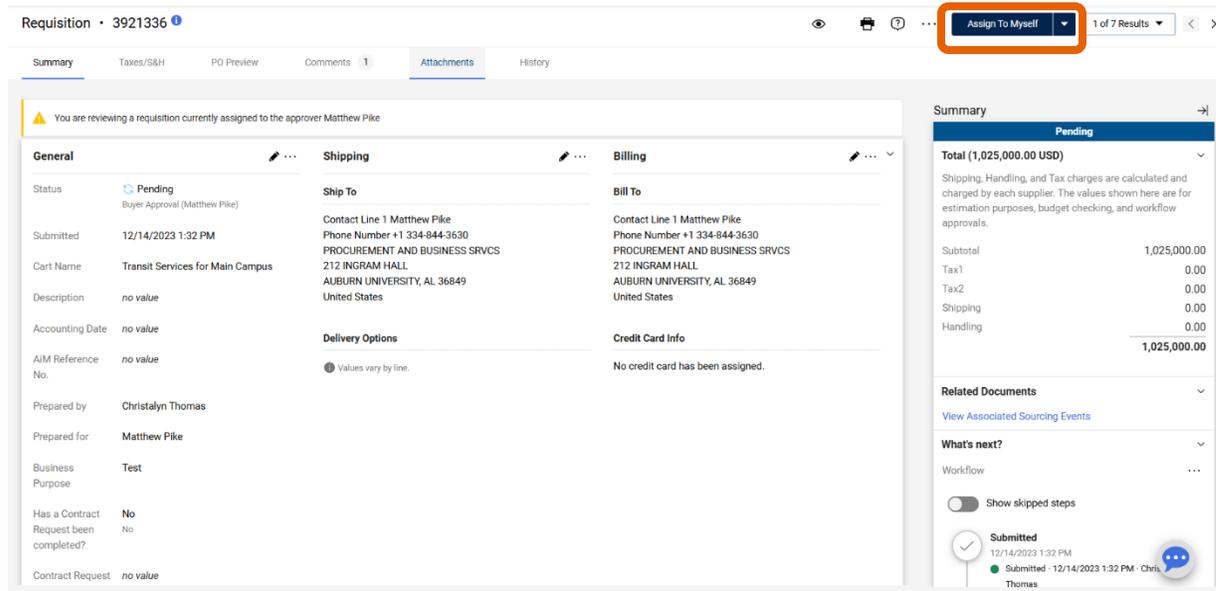
Submitted
12/14/2023 1:32 PM
Submitted - 12/14/2023 1:32 PM - Chris

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

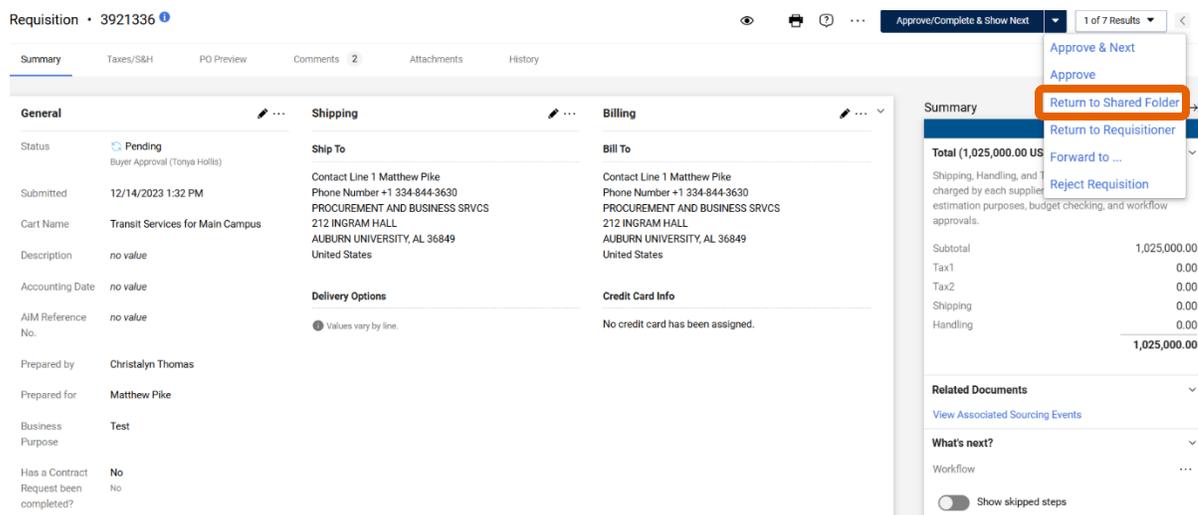
4.3 Returning Requisitions to Shared Approver Folders

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.

REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUISITIONER	AMOUNT	
<input type="checkbox"/> 3804163	1 Company Test 2-K Steel Products, Inc. 99 Company Test	Matthew Pike	8/15/2023 10:35 AM	Alicia Still	551,500.00 USD	
Requisition Name	2023-06-27 ADS0008 02	Folders	477 Days in folder [My PR Approvals]			
No. of line items	3					
<input type="checkbox"/> 3726288	Wreck-It Ralph	Matthew Pike	4/19/2023 10:19 AM	Jeffery Wooley	8,999.00 USD	
Requisition Name	2023-03-10 JRW0138 01	Folders	534 Days in folder [My PR Approvals]			
No. of line items	2		581 Days in folder [AU_Buyer_Approval_<\$15K]			

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

Requisition • 3726288 Assign To Myself | 2 of 6 Results

Summary Taxes/S&H PO Preview Comments Attachments History

You are reviewing a requisition currently assigned to the approver Matthew Pike

General	Shipping	Billing
Status Pending Buyer Approval (Matthew Pike)	Ship To Contact Line 1 Jeffery Wooley Phone Number +1 334-844-7771 021 Ingram Hall 133 South College Street Auburn University, AL 36849 United States	Bill To Contact Line 1 Jeffery Wooley Phone Number +1 334-844-7771 SHELBY CENTER 1214 SHELBY CNTR FOR ENG TECH 345 W. MAGNOLIA AVE. AUBURN, AL 36849

Submitted 4/19/2023 10:19 AM

Cart Name 2023-03-10 JRW0138 01

Description no value

- Assign to myself
- Approve & Next
- Approve
- Return to Requisitioner
- Forward to ...
- Copy to New Cart
- Add Comment**
- Add Notes to History
- Reject Requisition
- Add Non-Catalog Item

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

Add Comment
✕

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) | [Add recipient](#)

Jeffery Wooley (Prepared by, Approved) <pbsadmn@auburn.edu>

Matthew Pike (Approver, Approved) <pikemat@auburn.edu>

1000 characters remaining [expand](#) | [clear](#)

Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

Attach file (optional)

Attachment Type File Link/URL

File Name

Add Comment
Close

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...**

Requisition • 3804163 Assign To Myself 1 of 6 Results

Summary Taxes/S&H PO Preview Comments Attachments 1 History

⚠ You are reviewing a requisition currently assigned to the approver Matthew Pike
You are reviewing a requisition that has been resubmitted

General	Shipping	Billing
<p>Status 🔄 Pending PBS Manager (Matthew Pike)</p> <p>Submitted 8/15/2023 10:35 AM</p> <p>Cart Name 2023-06-27 ADS0008 02</p> <p>Description no value</p> <p>Accounting Date no value</p>	<p>Ship To</p> <p>Contact Line 1 Alicia Still Phone Number +1 334-844-7408 COLLEGE OF LIBERAL ARTS/ADMIN. OFF. 226 THACH HALL AUBURN UNIVERSITY, AL 36849 United States</p> <p>Delivery Options</p>	<p>Bill To</p> <p>Contact Line 1 Alicia Still Phone Number +1 334-844-7408 COLLEGE OF LIBERAL ARTS/ADMIN. OFF. 226 THACH HALL AUBURN UNIVERSITY, AL 36849 United States</p> <p>Credit Card Info</p>

Summary

Total (\$51,500.00 USD)

Shipping, Handling, and 1
charged by each supplier
estimation purposes, budget checking, and workflow
approvals.

Subtotal	551,500.00
Tax1	0.00
Tax2	0.00
Shipping	0.00
Handling	0.00
	551,500.00

Assign to myself

Approve & Next

Approve

Return to Requisitioner

Forward to ...

Reject Requisition

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

User Search ✕

Last Name ?

First Name ?

User Name ?

Email ?

Business Unit ? 🔍

Department ?

Role ?

Results Per Page

Search Close

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

User Search ✕

Name ↑	User Name	Email	Phone	Action
Pike, Matthew	pikemat	@auburn.edu	+1 334-844-	+ Select Matthew

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

Forward... ✕

To - Matthew Pike

996 characters remaining expand | clear

Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

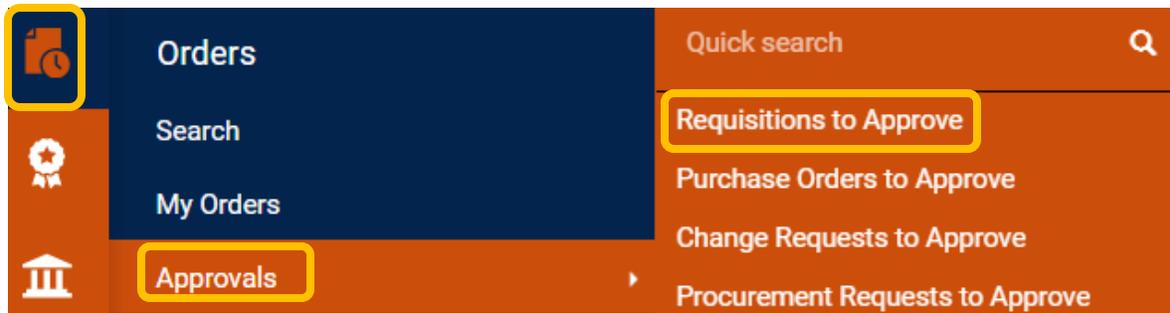
Forward Cancel

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.

REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUISITIONER	AMOUNT	
<input type="checkbox"/> 3804163	1 Company Test 2-K Steel Products, Inc. 99 Company Test	Matthew Pike	8/15/2023 10:35 AM	Alicia Still	551,500.00 USD	
	Requisition Name 2023-06-27 ADS0008 02	Folders				
	No. of line items 3					
<input type="checkbox"/> 3726288	Wreck-It Ralph	Matthew Pike	4/19/2023 10:19 AM	Jeffery Wooley	8,999.00 USD	
	Requisition Name 2023-03-10 JRW0138 01	Folders				
	No. of line items 2					

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

The screenshot shows a requisition page for ID 3726288. The 'Assign to Myself' dropdown menu is open, displaying options: 'Assign to myself', 'Approve & Next', 'Approve', 'Return to Requisitioner', 'Forward to ...', and 'Reject Requisition'. The 'Reject Requisition' option is highlighted. The main page shows tabs for Summary, Taxes/S&H, PO Preview, Comments, Attachments, and History. The Summary tab is active, showing a total of 8,999.00 USD. The requisition details are organized into sections: General (Status: Pending), Shipping (Ship To: Contact Line 1, Jeffery Wooley), and Billing (Bill To: Contact Line 1, Jeffery Wooley).

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

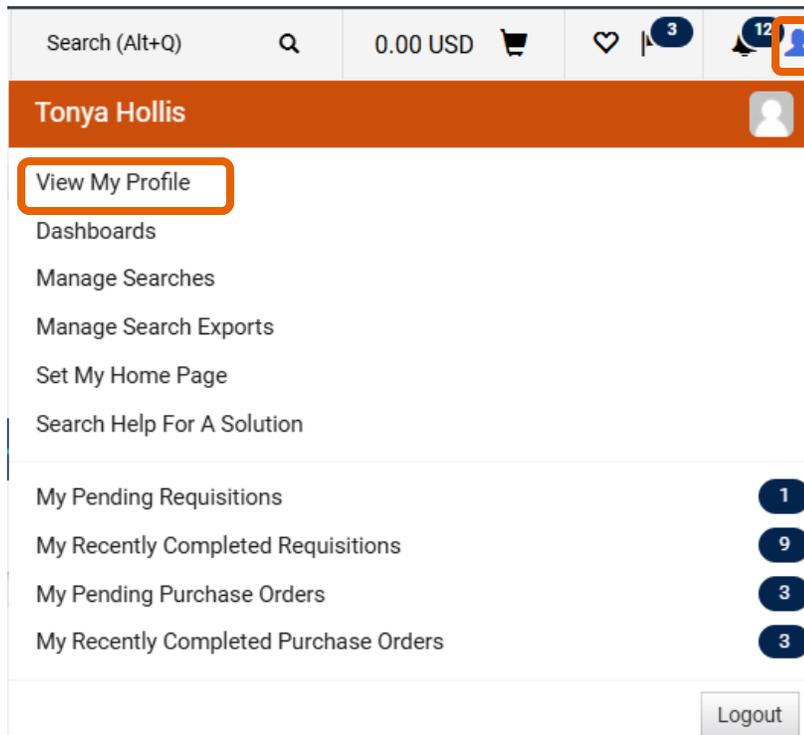
The 'Reject Requisition' dialog box is shown. It features a warning message: 'WARNING: You are about to reject ALL lines on this requisition. Once a PR is rejected, it cannot be reinstated. Click Reject Requisition or Cancel to leave the PR unchanged.' Below the warning is a text area labeled 'PR Reject Reason' with a character count of '1000 characters remaining'. At the bottom, there are two buttons: 'Reject Requisition' (highlighted with an orange box) and 'Close'.

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

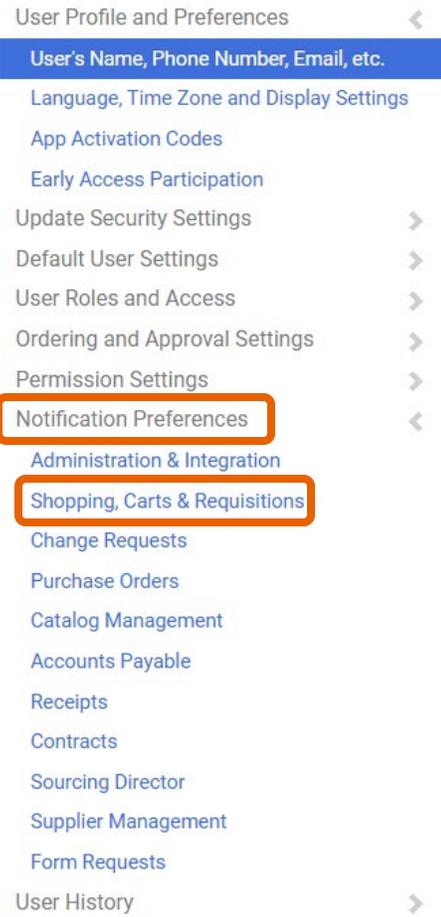
4.7 Removing/Editing Notifications

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**.



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

Notification Preferences:
Shopping, Carts & Requisitions

The in-application notifications are not yet available for all Email Notifications. ?

Prepared By - Cart Assigned Notice ?	Email
Prepared By - PR line item(s) rejected ?	Email & Notification
Prepared By - PR rejected/returned ?	Email & Notification
Cart Assigned Notice ?	Email & Notification
Receive PR and PO notifications for Carts Assigned to Me ?	Email & Notification
Assigned Cart Processed Notification ?	Email & Notification
Assigned Cart Deleted Notification ?	Email & Notification
PR submitted into Workflow ?	Email & Notification
PR pending Workflow approval ?	Email & Notification
PR Workflow Notification available ?	Email & Notification
PR Workflow complete / PO created ?	Email & Notification
PR line item(s) rejected ?	Email & Notification
Cart/PR rejected/returned ?	Email & Notification
Sourcing Event created from Requisition ?	Email & Notification
PR created from an awarded Sourcing Event ?	Email & Notification

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

Prepared By - PR line item(s) rejected ?	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
Prepared By - PR rejected/returned ?	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
Cart Assigned Notice ?	<input type="radio"/> Default <input checked="" type="radio"/> Override	<div style="border: 1px solid gray; padding: 2px;"> Email & Notification v <ul style="list-style-type: none"> None Email Notification Email & Notification </div>
Receive PR and PO notifications for Carts Assigned to Me ?	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
Assigned Cart Processed Notification ?	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
Assigned Cart Deleted Notification ?	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
PR submitted into Workflow ?	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
PR pending Workflow approval ?	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
PR Workflow Notification available ?	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
PR Workflow complete / PO created ?	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
PR line item(s) rejected ?	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
Cart/PR rejected/returned ?	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
Sourcing Event created from Requisition ?	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
PR created from an awarded Sourcing Event ?	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
Cart created from an awarded Sourcing Event ?	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification

- 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.)

- 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**.

Total Results 1 Display 20 per folder

▼ MY CHANGE REQUEST APPROVALS 1

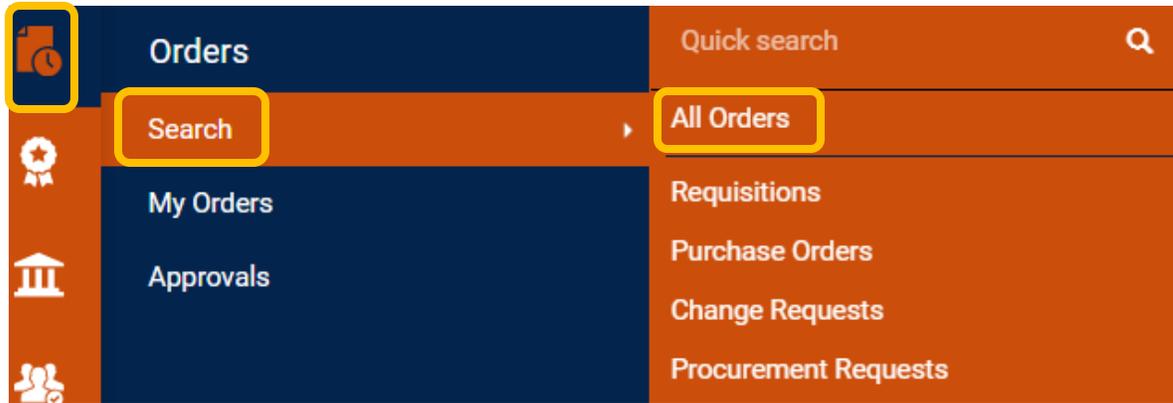
<input type="checkbox"/>	CHANGE REQUEST NO.	SUPPLIERS	ASSIGNED APPROVER	CREATE DATE/TIME	REQUESTOR	AMOUNT	
<input type="checkbox"/>	3608774	Mickey Mouse	Tonya Hollis	9/21/2022 11:40 AM	Matthew Pike	7,992.50 USD	
No. of line items		2		Folders			

4.8 Reviewing and Approving Form Requisitions

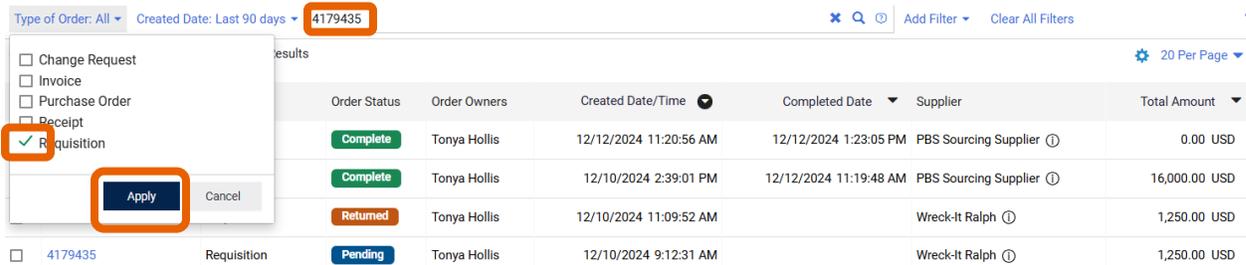
Target Audience: **Approver**

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.



- 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.

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

- 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**.

Showing 1 - 2 of 2 Results

All Folder Results

Results Per Page 20

Sort by: Folder name ascending

Page 1 of 1

Folder Name	Approver	Substitute	Action
FY Hold for Requisitions	Tonya Hollis		Assign
My PR Approvals	Tonya Hollis		Assign

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

Assign Substitute ×

Include Date Range for Substitution

Substitute Name [★]

[★] Required



Auburn University TigerBuy

Module 5: Sourcing Events (Bids & RFPs)

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.

Product Description	Catalog No.	Quantity	Price Estimate	Packaging
Custodial Test		16000	USD	Each

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.

Sourcing Events Initiated for Items on this Requisition

Requisition Number **4182773**

Sourcing Events
AU-2025-0000125 'TEST!' **Out For Bid**

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.

Sourcing Event Information ✕

Event Number **AU-2025-0000125** [Go to Sourcing Event](#)

Event Title **TEST!**

General Information		Event Timeline		Suppliers and Responses	
Original PR Number	4182773	Create Date	12/12/2024 1:23 PM	# of Invitations	0
Awarded PR Number	To Be Assigned	Release Date	To Be Assigned	# of Suppliers Intending to Bid	0
Work Group	Auburn University	Open Date	To Be Assigned	# of Bids Submitted	0
Event Administrator	cmc0122@auburn.edu	Close Date	To Be Assigned		
Event Type	AU - Request for Bid	Sealed Bid	To Be Assigned		
Event Status	Draft	Open Date			
		Award Date	To Be Assigned		

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.

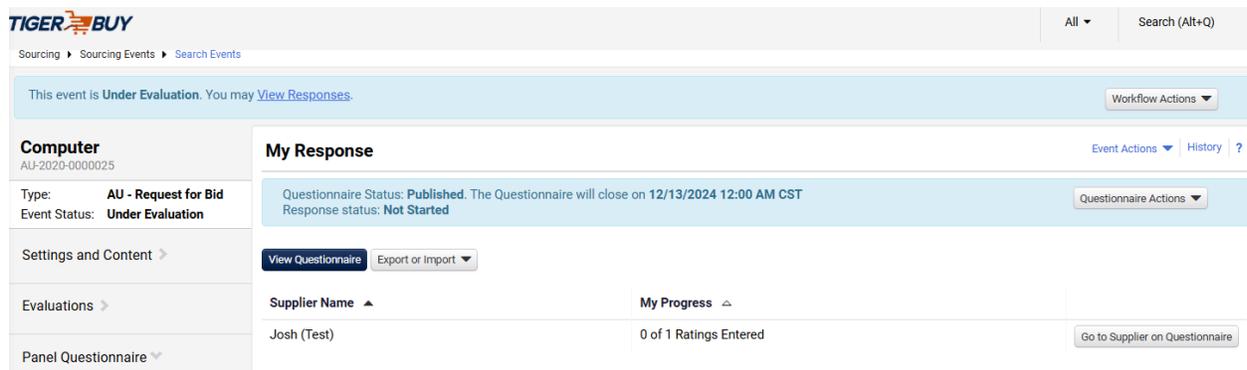
5.2 Sourcing Event Evaluation

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.



The screenshot displays the TigerBuy interface for a sourcing event. The event is titled "Computer" (AU-2020-0000025) and is currently in an "Under Evaluation" status. The questionnaire status is "Published" and will close on 12/13/2024 at 12:00 AM CST. The response status is "Not Started". A table shows the progress for "Supplier Name" "Josh (Test)" with "0 of 1 Ratings Entered". A "Go to Supplier on Questionnaire" button is visible.

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.

Panel Questionnaire for: Computer ?

Incomplete: 0 of 1 Group(s) Rated

You can save changes at anytime, but you must rate all suppliers for a whole group to be able to submit. You may complete only one group or any number but your response is only counted per complete group for all suppliers. If any groups are marked required then you must rate all supplier for that group before you can submit your ratings.

[Export Questionnaire](#) ★ Required Group

Rate Suppliers Below On Their Responses and Panel Questions

[Expand All](#) | [Collapse All](#) Josh (Test)

My Progress	0 of 1 Ratings Entered
▼ Page 1	
▼ Group 1	
Is this response the lowest bid received and does it meet the specifications listed?	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">1 - Test ▼</div> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block; margin-top: 2px;">1 - Test 2 - Test</div>

★ Required [Save Progress](#)

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.

Panel Questionnaire for: Computer

Complete: All Suppliers have been rated

You have rated all suppliers. You may submit now or continue editing.

[Submit](#)



Auburn University TigerBuy

Module 6: Receiving Orders/Products

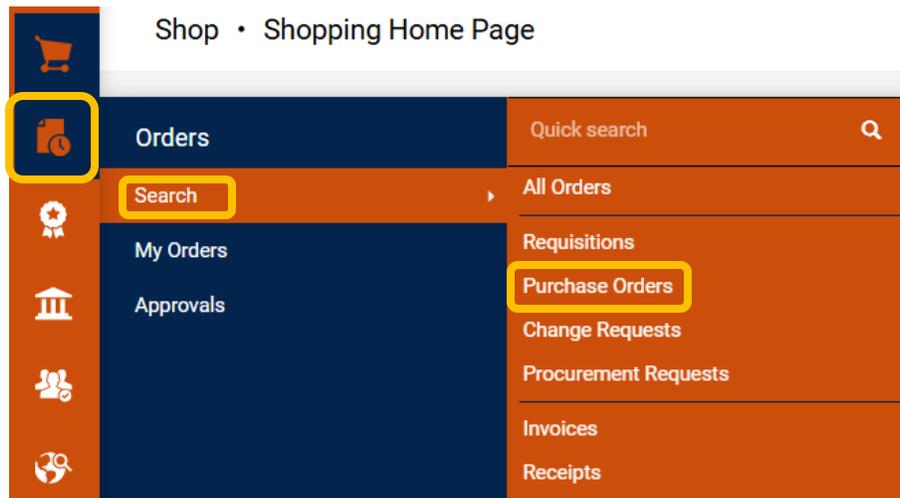
Certification of Receipt is now required to acknowledge receipt of your order. It reads “I certify that the goods/services listed below have been received in satisfactory condition. Any falsification of this receipt will result in administrative action, which may include disciplinary measures”.

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**.

✔ Receipt Created

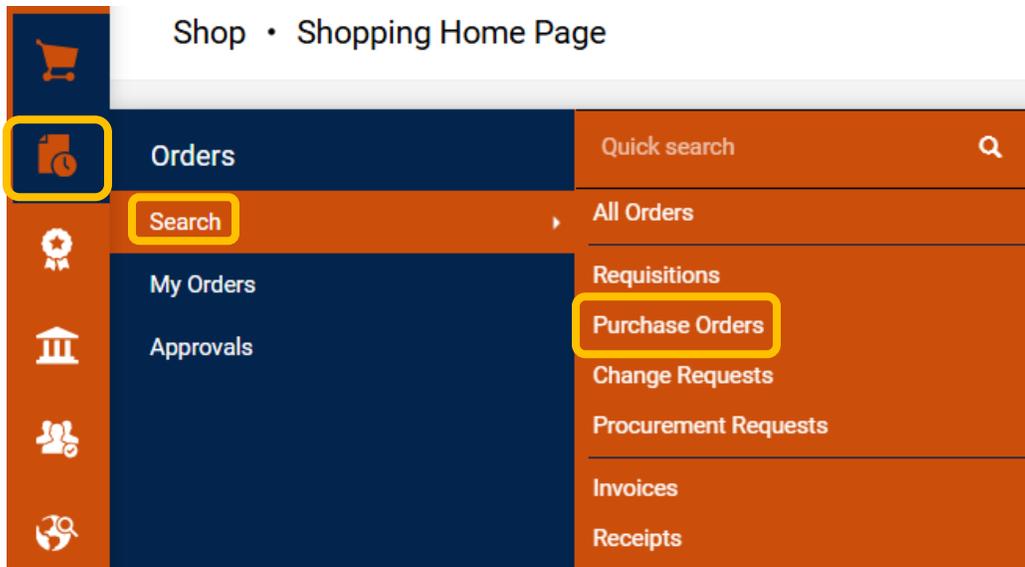
Summary		Next Steps
Receipt No	R-000473 	Create Qty Receipt
Created for the PO No(s)	J-0000628 	

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.

Purchase Order • Wreck-It Ralph • J-0000629 🖨️ ? ⋮

Status Summary Confirmations Shipments **Receipts** Invoices Comments Attachments History

Records found: 0 +

There are no records found. **J-0000629: Create Receipt** ×

Net Qty Received	Net Cost Received	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	✓
1	--	Construction Hats		EA	21.99	250 EA	5,497.50	✓

Create Quantity Receipt Cancel

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.

PO • J-0000629 🖨️ □

Line	Item	Catalog No.	Qty/UOM Ordered	Quantity	Status	⊗	📄	🗑️	□
1	Construction Hats		250 EA	250	Received	⊗	📄	🗑️	□

ITEM DETAILS

PO Business Unit Auburn University (Auburn_University)

Contract No. no value

Line Item Type no value

Flex Field 2

Attachments [Add](#)

- 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**.

Quantity Receipt • 681611

Save Updates Complete

Summary Comments Attachments History

Line	Item	Catalog No.	Qty/UOM Ordered	Quantity	Status
1	Construction Hats		250 EA	250	Received
<p>ITEM DETAILS</p> <p>PO Business Unit: Auburn University (Auburn_University)</p> <p>Contract No.: no value</p> <p>Line Item Type: no value</p> <p>Flex Field 2: <input type="text"/></p> <p>Attachments: Add</p> <p>Notes: <input type="text"/></p> <p>1000 characters remaining</p>					
1	Construction Hats		250 EA	0	Returned

Summary

Draft

Details

Creation Date: 12/9/2024 2:23:31 PM

Source: Manual

Supplier: Wreck-It Ralph

Received by: Tonya Hollis (Auburn University)

Total (5,497.50 USD)

Subtotal: 5,497.50

5,497.50

Related Documents

Purchase Order: J-0000629

6.2 Creating Receipt Returns

Target Audience: **Requisitioner**

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

Shop • Shopping Home Page

Orders

Quick search

Search

All Orders

Requisitions

Purchase Orders

Change Requests

Procurement Requests

Invoices

Receipts

My Orders

Approvals

2. From the search results, select the purchase order number that requires a returned 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 return receipt and choose **Create Quantity Receipt**.

Purchase Order • Wreck-It Ralph • J-0000629

Status Summary Confirmations Shipments **Receipts** Invoices Comments Attachments History

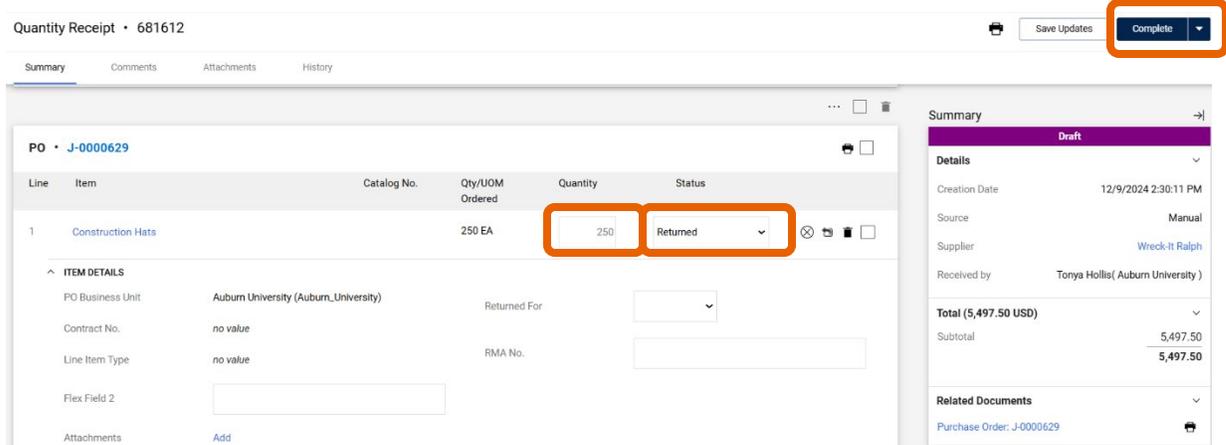
Records found: 0 +

There are no records found. **J-0000629: Create Receipt**

Net Qty Received	Net Cost Received	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1	--	Construction Hats		EA	21.99	250 EA	5,497.50	✓

Create Quantity Receipt Cancel

- 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**.

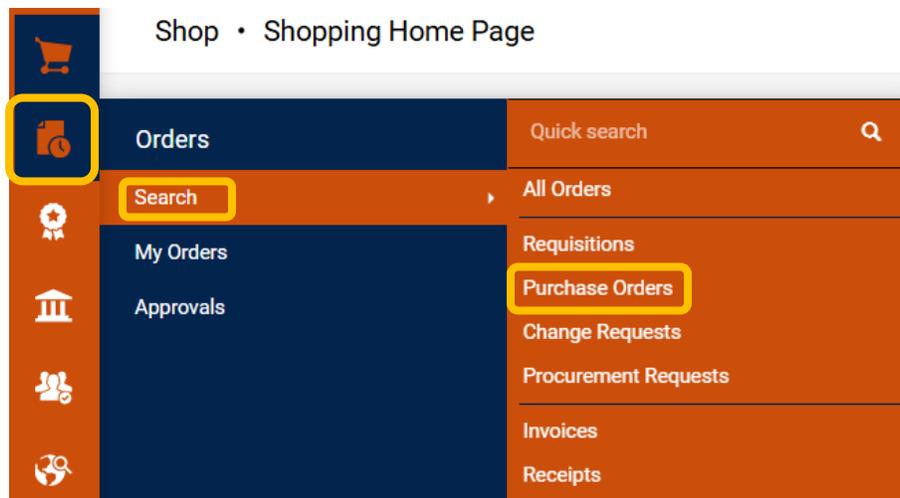


6.3 Creating Cost Receipts

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.

- 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.

PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Matching Status	Total Amount
P0084367	Wreck-It Ralph	4/21/2025 1:20:54 PM	Completed	4271867	Tonya Hollis	Sent To Supplier	No Matches	12,500.00 USD
P0084365	Wreck-It Ralph	3/5/2025 1:36:43 PM	Completed	4241304	Matthew Pike	Sent To Supplier	No Matches	10,500.00 USD
P0084364	Wreck-It Ralph	3/5/2025 1:11:41 PM	Completed	4241223	Matthew Pike	Sent To Supplier	Partially Matched	30,499.50 USD
P0084363	Wreck-It Ralph	3/4/2025 2:50:17 PM	Completed	4239626	Matthew Pike	Sent To Supplier	No Matches	0.00 USD

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

Purchase Order • [Wreck-It Ralph](#) • P0084367 Revision 0

Status Summary Revisions **1** Confirmations Shipments Change Requests **Receipts** Invc

Records found: 0 +

There are no receipts for this PO.

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.

P0084367: Create Receipt ✕

Line	Net Qty Received	Net Cost Received	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1	--	--	Bricks		EA	2.50	5,000 EA	12,500.00	✓

Create Cost Receipt
Cancel

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

Cost Receipt • 710180 Save Updates **Complete**

Summary Comments Attachments History

PO • P0084367

Line	Item	Catalog No.	Cost Ordered	Cost	Status
1	Bricks		12,500.00	12,500.00 USD	

Cost Received

ITEM DETAILS
PO Business Unit
Auburn University (Auburn_University)
Contract No.
no value

Summary Draft

Details

Creation Date 4/21/2025 1:30:37 PM
Source Manual
Supplier Wreck-It Ralph
Received by Tonya Hollis (Auburn University)

Total (12,500.00 USD)

Subtotal 12,500.00
12,500.00

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



Summary

Receipt No R-000476

Created for the PO P0084367
No(s)

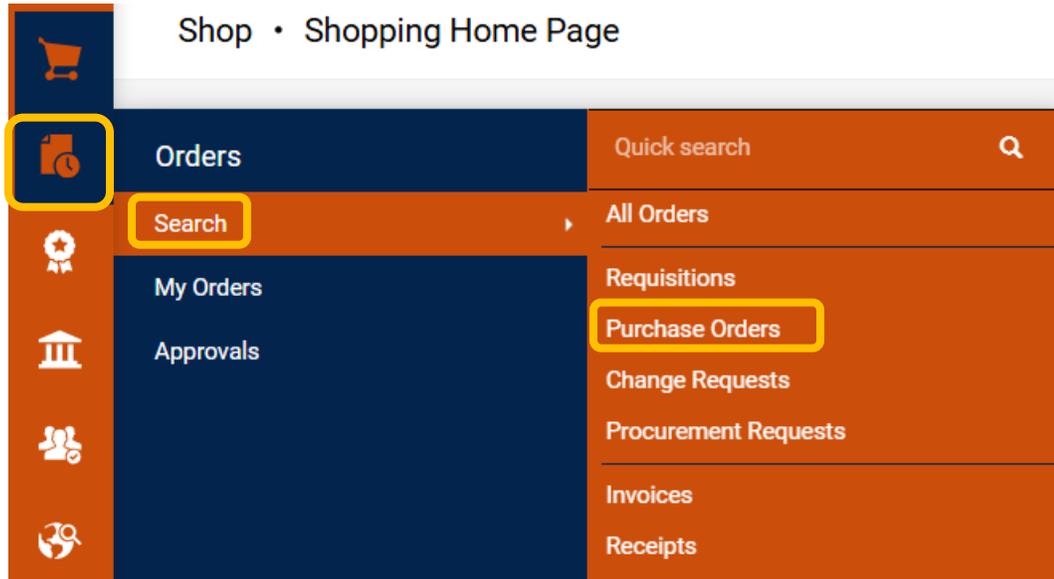
Next Steps

[Create Qty 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	Stuffys 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

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

Purchase Order • Wreck-It Ralph • J-0000629

Status Summary Confirmations Shipments **Receipts** Invoices Comments Attachments History

Records found: 0

There are no records found. **J-0000629: Create Receipt**

	Net Qty Received	Net Cost Received	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1	--	--	Construction Hats		EA	21.99	250 EA	5,497.50	✓

Create Quantity Receipt Cancel

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

Quantity Receipt • 681612

Save Updates **Complete**

Summary Comments Attachments History

PO • J-0000629

Line	Item	Catalog No.	Qty/UOM Ordered	Quantity	Status
1	Construction Hats		250 EA	250	Cancelled

ITEM DETAILS

PO Business Unit: Auburn University (Auburn_University)

Contract No.: no value

Line Item Type: no value

Flex Field 2:

Attachments: [Add](#)

Summary Draft

Details

Creation Date: 12/9/2024 2:30:11 PM

Source: Manual

Supplier: Wreck-It Ralph

Received by: Tonya Hollis (Auburn University)

Total (5,497.50 USD)

Subtotal: 5,497.50

Related Documents

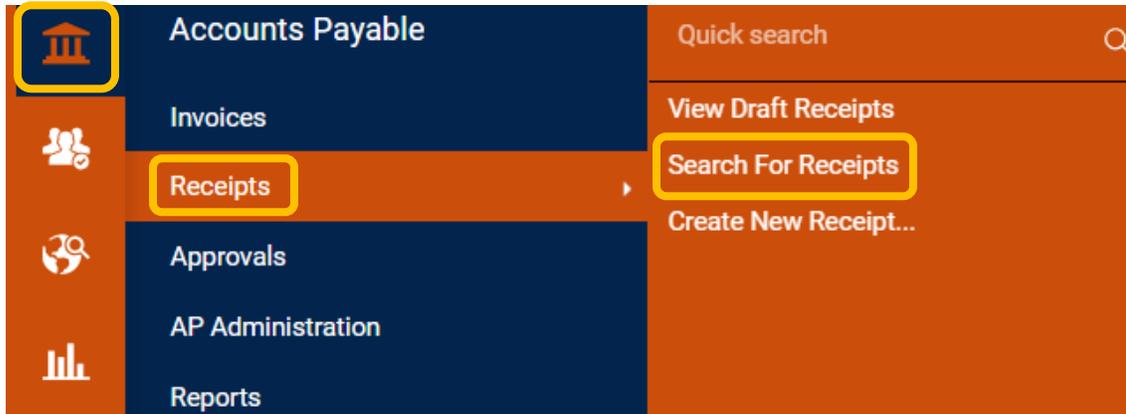
Purchase Order: J-0000629

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.

Packing Slip No.	no value	Flexible Drop Down	no value
Supplier Name	Wreck-It Ralph	Attachments	Add
Received by	Tonya Hollis (Auburn University)	Notes	no value
Receipt Address	no value		
	Contact Line 1 Tonya Hollis Phone Number +1 334-844-3637 PROCUREMENT AND BUSINESS SRVCS 212 INGRAM HALL AUBURN UNIVERSITY, AL 36849 United States		

PO • J-0000628					
Line	Item	Catalog No.	Qty/UOM Ordered	Quantity	Status
1	Construction Hats		250 EA	250	Received

Summary →	
Completed	
Details ↓	
Creation Date	12/9/2024 2:11:46 PM
Completion Date	12/9/2024 2:13:49 PM
Source	Manual
Supplier	Wreck-It Ralph
Received by	Tonya Hollis(Auburn University)
Total (5,497.50 USD) ↓	
Subtotal	5,497.50
	5,497.50
Related Documents ↓	
Purchase Order: J-0000628	



Auburn University TigerBuy

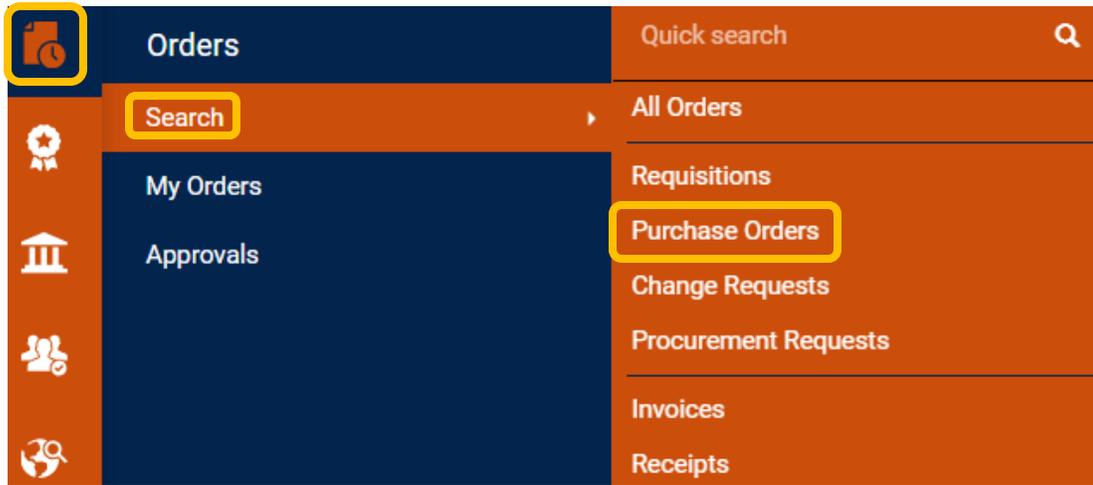
Module 7: Invoice Approvals & AP Forms

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**.

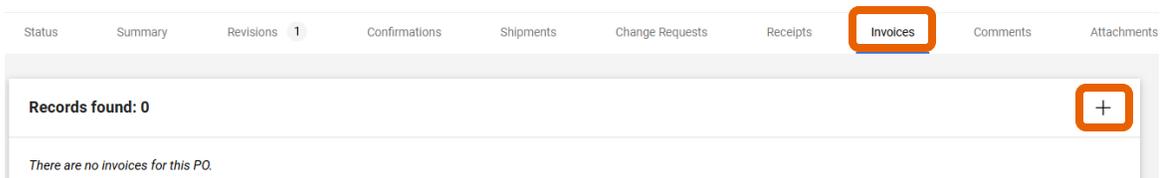


2. Select the purchase order that requires the creation of an invoice.

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	Stuff'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.

Purchase Order • [Wreck-It Ralph](#) • P0082137 Revision 0



- 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.**

Invoice · Wreck-It Ralph · 2996392 

Entry Summary Matching Supplier Messages Comments Attachments 1 History

General	Addresses	Note/Attachments	Summary						
Invoice Type Invoice Invoice Number <i>no value</i> Supplier Invoice No. Test123456 Supplier Name Wreck-It Ralph Supplier No. 904448544 Invoice Date 12/16/2024 Due Date 12/16/2024 <i>is overridden</i> Invoice Name 2024-12-16 tah0026 01 1099 Income Type <i>no value</i> Campus AU Business Construction Project	Remit To 123 Main Street Opelika, Alabama 36804 United States Phone 334-844-1000 Address Id VR Vendor-Remittance 1 Bill To Contact Line 1 Tonya Hollis Phone Number #1 334-844-3637 PROCUREMENT AND BUSINESS SRVCS 212 INGRAM HALL AUBURN UNIVERSITY, AL 36849 United States Payment Information Accounting Date 12/16/2024 F.O.B. Destination Payment Method Unknown Payment Record <i>no value</i>	External Note <i>no value</i> Internal Notes <i>no value</i> External Attachments Add <table border="1"> <thead> <tr> <th>Internal Attachments</th> <th>Date</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>TEST.docx</td> <td>12/16/2024</td> <td>Add</td> </tr> </tbody> </table> Discount, Tax, Shipping & Handling Discount, tax, shipping & handling Allocation Weighted Header-level	Internal Attachments	Date	Action	TEST.docx	12/16/2024	Add	Summary Wreck-It Ralph Supplier Invoice No. Test123456 Total (1,250.00 USD) Subtotal 1,250.00 Discount 0.00 Tax1 0.00 Tax2 0.00 Shipping 0.00 Handling 0.00 Withholding Tax 1 0.00 1,250.00
Internal Attachments	Date	Action							
TEST.docx	12/16/2024	Add							

- A confirmation of the completed invoice will be displayed.

✔ Invoice Submitted

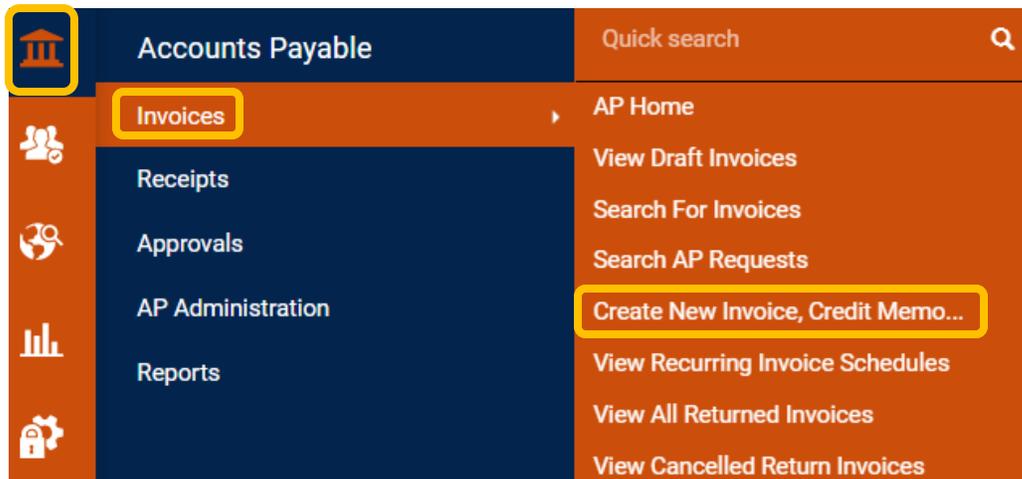
Summary	Create Invoice
Invoice number T-001116	Type Invoice
Invoice Status Pending	From PO
Supplier Invoice No. Test123456	PO numbers <input type="text"/>
Invoice name 2024-12-16 tah0026 01	<input type="button" value="Create"/>
Invoice date 12/16/2024	
Invoice total 1,250.00 USD	
Number of line items 2	
Created for the PO No(s) P0082137	

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**.

A screenshot of a 'Create Invoice' form. The form has a title bar 'Create Invoice' with a close button. It contains three fields: 'Type' with a dropdown menu set to 'Invoice', 'From' with a dropdown menu set to 'Non PO', and 'Supplier name' with a text input field containing 'Wreck-It Ralph' and a search icon. At the bottom right, there are two buttons: 'Create' (highlighted with a yellow box) and 'Cancel'.

- 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.

Invoice • Wreck-It Ralph • 2996350 Simple **Complete** Save

Entry Summary Matching Supplier Messages Comments Attachments 1 History

Invoice Number	no value	Remit To	
Invoice Date	12/16/2024 <small>mm/dd/yyyy</small>	123 Main Street Opelika, Alabama 36804	
Due Date ★	12/16/2024 <small>mm/dd/yyyy</small> <input checked="" type="checkbox"/> Override	United States Phone 334-844-1000- Address Id VR Vendor-Remittance 1	
Invoice Owner	Tonya Hollis	Shipping address	no address
Supplier Name	Wreck-It Ralph		
Supplier Invoice No. ★	TestA		
Currency	US Dollar		
<input type="checkbox"/> Discount, Tax, Shipping & Handling			
Codes			
LINE			

Summary →

Draft

Be aware of these issues.
You may review and proceed.

Empty: Grouping Indicator: Line
You do not have permission to access this field: Grouping Indicator

Empty: Check Comment: Line
You do not have permission to access this field: Check Comment

Wreck-It Ralph

Supplier Invoice No. TestA

Total (500.00 USD)

Subtotal	500.00
Discount	0.00
Tax1	0.00
Tax2	0.00
Shipping	0.00
Handling	0.00
Withholding Tax 1	0.00
Total	500.00

- A confirmation of the completed invoice will be displayed.

✔
Invoice Submitted

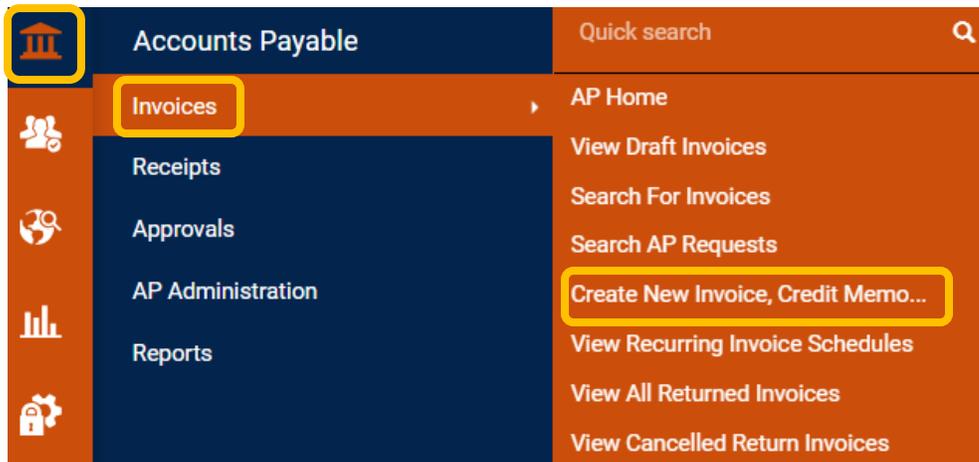
Summary	Create Invoice
Invoice number: T-001117	Type: Invoice
Invoice Status: Pending	From: PO
Supplier Invoice No.: TestA	PO numbers: <input type="text"/>
Invoice name: 2024-12-16 tah0026 02	
Invoice date: 12/16/2024	Create
Invoice total: 500.00 USD	
Number of line items: 1	

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**.

A screenshot of the 'Create Invoice' form. The form has a title bar 'Create Invoice' with a close button. Below the title bar, there are three fields: 'Type' with a dropdown menu showing 'Credit Memo', 'From' with a dropdown menu showing 'Non PO', and 'Supplier name' with a text input field containing 'Wreck-It Ralph' and a search icon. At the bottom right, there are two buttons: 'Create' and 'Cancel'. The 'Create' button is highlighted with a yellow box.

- 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.

Credit memo • Wreck-It Ralph • 2996354

Simple [?] [Complete] Save

Entry Summary Matching Supplier Messages Comments Attachments 1 History

Invoice Number: no value

Invoice Date: 12/16/2024

Due Date: 12/16/2024

Invoice Owner: Tonya Hollis

Supplier Name: Wreck-It Ralph

Supplier Invoice No.: TestB

Currency: US Dollar

Remit To: 123 Main Street, Opelika, Alabama 36804, United States, Phone 334-844-1000, Address Id VR Vendor-Remittance 1

Shipping address: no address

Summary: Draft

Be aware of these issues. You may review and proceed.

Empty Grouping Indicator: Line. You do not have permission to access this field: Grouping Indicator

Empty Check Comment: Line. You do not have permission to access this field: Check Comment

Wreck-It Ralph

Supplier Invoice No. TestB

Total (-500.00 USD)

Subtotal -500.00

Discount 0.00

Tax1 0.00

Tax2 0.00

Shipping 0.00

Handling 0.00

-500.00

Codes

LINE

Scroll down for more required information.

- A confirmation of the credit memo will be displayed.

✔ Credit memo Submitted

Summary	Create Invoice
Credit memo number: T-001118	Type: Invoice
Credit memo status: Pending	From: PO
Supplier Invoice No.: TestB	PO numbers: [Search]
Credit memo name: 2024-12-16 tah0026 04	[Create]
Credit memo date: 12/16/2024	
Credit memo total: -500.00 USD	
Number of line items: 1	

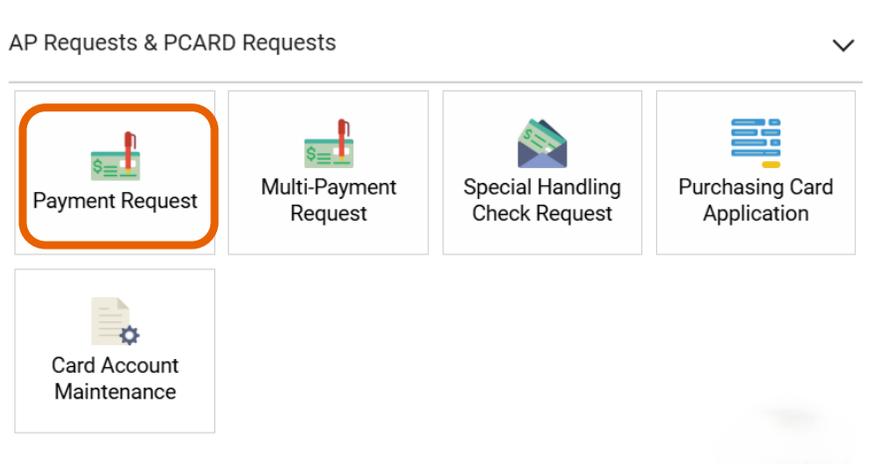
7.3 Creating a Payment Request

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**.

Payment Request 2	Instructions	Request Actions History ?
Form Number 1049628	This payment request form should be used to issue payments for the following: 1. Honorariums 2. Human Participant Incentives 3. Royalties 4. Awards	
Purpose Check Request		
Status Incomplete	All one-time payments that do not have a Banner ID should be submitted through the eVendor Voucher System.	
Instructions		
Supplier ▲		
Questions ▲		
Review and Submit		
Form Approvals		

Next >

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

Payment Request 2
Form Number 1049628
Purpose Check Request
Status Incomplete

Supplier

Supplier * Wreck-It Ralph
Shipping Fee Type * Flat Fee
Shipping * 0.000
Handling Fee Type * Flat Fee
Handling * 0.000

Remit-To Address

Remit-To Address * VR Vendor-Remittance 1 (Primary Remittance)
Opelika, Alabama 36804
United States
Phone 334-844-1000-

Payment Method

★ Required

Previous Save Progress Next

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

Payment Request Type

Click the type of payment request you are wishing to submit from the list below.

Type of Check Request *

- Refund
- Honorarium
- Human Participant Incentive
- Royalties
- Awards
- Wire Transfer

Transaction Details

Supplier Invoice Number/Date * TestC

Currency USD

Amount * 500.00

Previous Save Progress Next

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

Codes Request Actions | History | ?

Accounting Codes

LINE	Bank Code	Chart	Fund	Fund - Banner	Fund Type	Organization	Account	Program	Activity	edit
	05 Bank Code for Chart A	A Auburn University	101001-A AU Unrestricted Base Budget	101001 AU Unrestricted Base Budget	1A 1A	113600-A Procurement and Business Services	70935-A Office Supplies	7000-A Institutional Support expense	no value	

Add alternate distribution for

Bank Codes

User does not have the necessary permissions to view the custom fields associated with this section.

★ Required

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

Additional Information Request Actions | History | ?

General Information

1099 Income Type

Campus

Business Purpose

Payment Information

Record Number

★ Required

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

Review and Submit Request Actions | History | ?

✓ Required Fields Complete

Section	Progress
Supplier	✓ Required Fields Complete
Questions	✓ Required Fields Complete
Codes	✓ Required Fields Complete
Additional Information	✓ Required Fields Complete

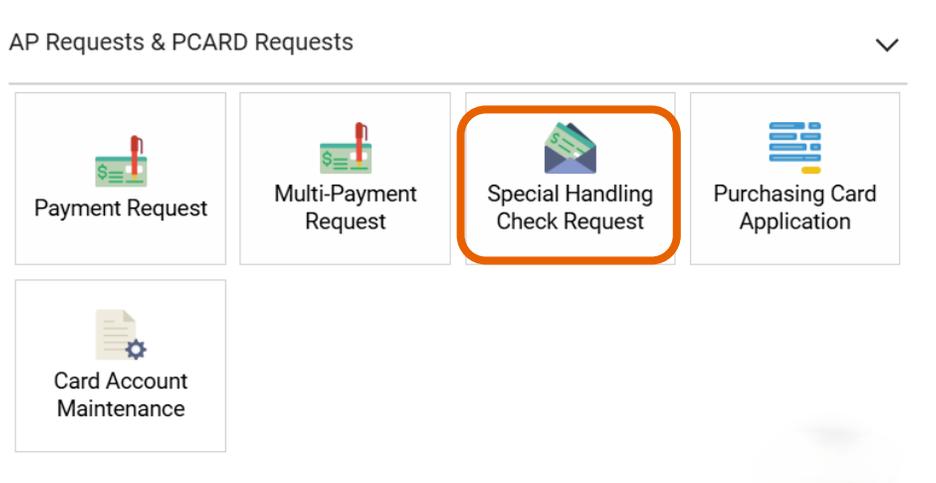
8. Check request will then be **Under Review**. This means it is now awaiting approval by a PBS auditor to be paid.

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**.

The screenshot displays the "Special Handling Check Request" form. On the left, a sidebar shows the form's metadata: Form Number 1049611, Purpose Check Request, and Status Incomplete. Below this is a table of instructions with checkboxes: Details (checked), Supplier (unchecked), Questions (unchecked), Review and Submit, and Form Approvals. The main content area is titled "Instructions" and contains the text: "This form is to only be used for checks that require special handling, documents to be mailed with the check and should be picked up from Procurement & Business Services in Ingram Hall." In the top right corner, there are links for "Request Actions", "History", and a help icon. A blue "Next >" button with an orange border is located in the bottom right corner of the form area.

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

Special Handling Check R... **Supplier** Request Actions | History | ?

Form Number 1049611
Purpose Check Request
Status Incomplete

Instructions
Details ✓
Supplier ▲
Questions ▲
Review and Submit
Form Approvals

Supplier * Wreck-It Ralph

Shipping Fee Type * Flat Fee
Shipping * 0.000

Handling Fee Type * Flat Fee
Handling * 0.000

Remit-To Address

Remit-To Address * VR Vendor-Remittance 1 (Primary Remittance) ▼
123 Main Street
Opelika, Alabama 36804
United States
Phone 334-844-1000-

Payment Method

★ Required

Previous Save Progress Next

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

▼ Invoice Details

Supplier Invoice Number/Date * Test D

Currency USD

Amount * 500.00

Invoice Date

Need by Date

Previous Save Progress Next

Scroll down for more required information.

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

Accounting Codes

LINE	Bank Code	Chart	Fund	Fund - Banner	Fund Type	Organization	Account	Program	Activity
	05 Bank Code for Chart A	A Auburn University	101001-A AU Unrestricted Base Budget	101001 AU Unrestricted Base Budget	1A 1A	113600-A Procurement and Business Services	70935-A Office Supplies	7000-A Institutional Support expense	no value

Add alternate distribution for

Bank Codes

User does not have the necessary permissions to view the custom fields associated with this section.

★ Required

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

Additional Information Request Actions | History | ?

General Information

1099 Income Type

Campus

Business Purpose

Payment Information

Record Number

★ Required

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

Review and Submit Request Actions | History | ?

✓ Required Fields Complete

Section	Progress
Details	✓ Required Fields Complete
Supplier	✓ Required Fields Complete
Questions	✓ Required Fields Complete
Codes	✓ Required Fields Complete
Additional Information	✓ Required Fields Complete

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

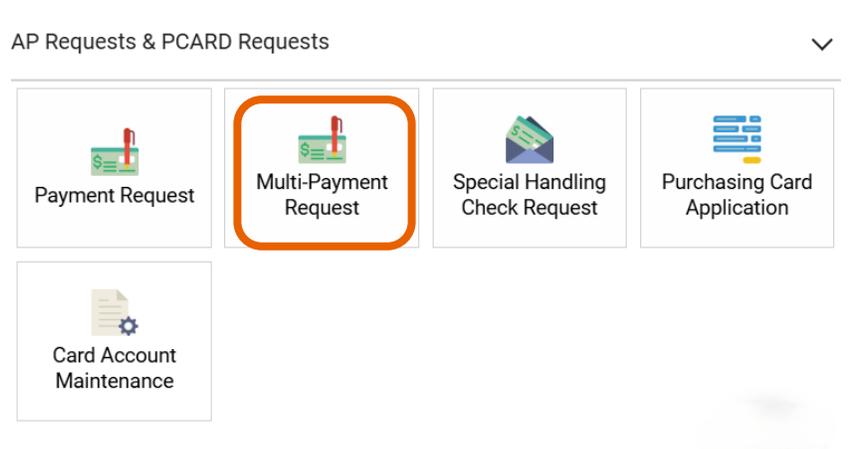
7.5 Creating a Multi-Payment Request

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**.

Multi Payment Request	Instructions	Request Actions	History	?
Form Number 1049613 Purpose Multi-Check Request Status Incomplete	Instructions go here			
Instructions				
Supplier	▲			
Questions	▲			
Attachments	✓			
Check Requests				
Review and Submit				
Form Approvals				

Next >

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

Supplier Request Actions ▾ | History ?

Supplier * [Supplier Search](#)

Shipping Fee Type *

Shipping *

Handling Fee Type *

Handling *

Remit-To Address

Remit-To Address *
123 Main Street
Opelika, Alabama 36804

United States
Phone 334-844-1000-

Payment Method

★ Required

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**.

Invoice Details

Supplier Invoice Number *

Description
2000 characters remaining

Currency

Amount *

Invoice Date

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

Accounting Codes

LINE	Bank Code	Chart	Fund	Fund - Banner	Fund Type	Organization	Account	Program	Activity	edit
	05 Bank Code for Chart A	A Auburn University	101001-A AU Unrestricted Base Budget	101001 AU Unrestricted Base Budget	1A 1A	113600-A Procurement and Business Services	70935-A Office Supplies	7000-A Institutional Support expense	no value	

Add alternate distribution for **Go**

Bank Codes

User does not have the necessary permissions to view the custom fields associated with this section.

★ Required **Next >**

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

Additional Information Request Actions | History | ?

General Information

1099 Income Type

Campus Select from all values...

Business Purpose

Payment Information

Record Number

★ Required **Save Progress** **Next >**

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

Attachments Request Actions | History | ?

#	Attachment	
1	Test	Edit

Add Attachment

Save Progress **Next >**

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

Check Requests Request Actions ▾ | History | ?

Description	Amount	Action
No Value	500	

◀ Previous

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.

Multi Payment Request

Form Number **1049613**
 Purpose **Multi-Check Request**
 Status **Incomplete**

Instructions

Supplier ✓

Questions ✓

Codes ✓

Additional Information ✓

Attachments ✓

Check Requests

Review and Submit

Form Approvals

Request Actions ▾ | History | ?

✓ Required Fields Complete

Section	Progress
Supplier	✓ Required Fields Complete
Questions	✓ Required Fields Complete
Codes	✓ Required Fields Complete
Additional Information	✓ Required Fields Complete
Attachments	✓ Required Fields Complete
Check Requests	✓ Required Fields Complete

◀ Previous
Add to Favorites
Submit ▾

Save and Add Another

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.

Check Requests Request Actions ▾ | History | ?

Description	Amount	Action
No Value	500	
Honorarium	500	

Multiple payees are listed here. You can use the “Previous” button to edit the current request or the “Edit” button to edit any other requests.

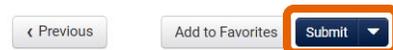


11. Once all payees have been added and all sections are complete, select **Submit**.

Review and Submit Request Actions ▾ | History | ?

✓ Required Fields Complete

Section	Progress
Supplier	✓ Required Fields Complete
Questions	✓ Required Fields Complete
Codes	✓ Required Fields Complete
Additional Information	✓ Required Fields Complete
Attachments	✓ Required Fields Complete
Check Requests	✓ Required Fields Complete



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

Multi Payment Request		Review and Submit	
Form Number	1049613	Request Actions History ?	
Purpose	Multi-Check Request	✓ Required Fields Complete	
Status	Under Review		
Instructions		Section	Progress
Supplier	✓	Supplier	✓ Required Fields Complete
Questions	✓	Questions	✓ Required Fields Complete
Codes	✓	Codes	✓ Required Fields Complete
Additional Information	✓	Additional Information	✓ Required Fields Complete
Attachments	✓	Attachments	✓ Required Fields Complete
Check Requests		Check Requests	✓ Required Fields Complete

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.

Procurement Requests

 Sole Source Justification	 Vehicle Request	 PSC Request	 Address Request
 Preferred Vendor Feedback	 Vendor Complaint		

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

Address Request		Instructions	
Form Number	1049637	Request Actions History ?	
Purpose	Generic Request	This form is to be used to request a new Ship To or Bill To address within JAGGAER/Banner.	
Status	Incomplete		
Instructions			
Questions	▲		
Review and Submit			
Discussion			
Form Approvals			

Next >

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

Address Request
Form Number 1049637
Purpose Generic Request
Status Incomplete

Questions - Address Request

Request Actions | History | ?

★ Response Is Required

▼ Address Information

Department *

Room/Building *

Physical Street Address *

City *

State *

← Previous Save Progress Next >

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

Address Request
Form Number 1049637
Purpose Generic Request
Status Incomplete

Review and Submit

Request Actions | History | ?

✓ Required Fields Complete

Section	Progress
Questions	✓ Required Fields Complete

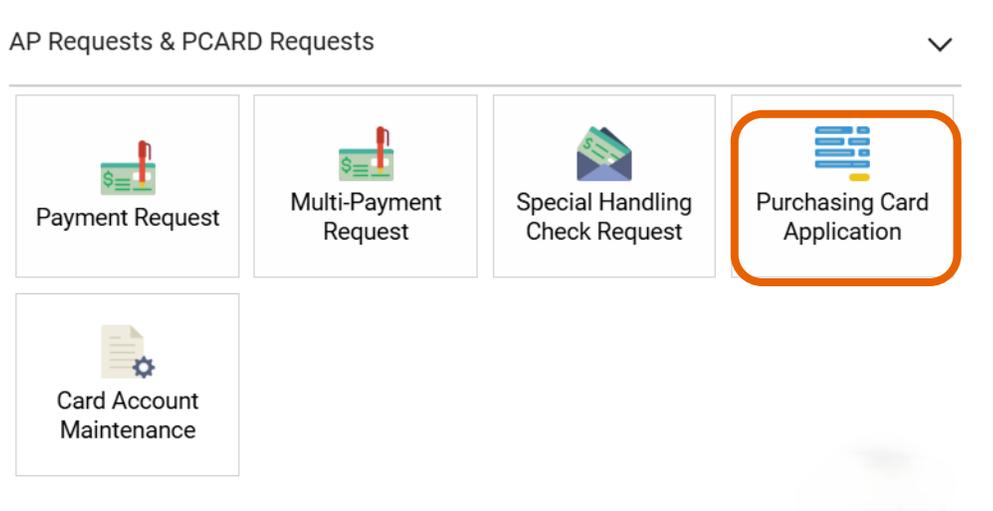
← Previous Add to Favorites Submit

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**.

The screenshot displays the "Purchasing Card Application" form. On the left, a sidebar shows the form's details: Form Number 1049662, Purpose Generic Request, and Status Incomplete. The main area contains "Instructions" and a progress bar with steps: Attachments (checked), Questions (warning), Review and Submit, Discussion, and Form Approvals. In the top right corner, there are links for "Request Actions", "History", and a help icon. A "Next >" button is located in the bottom right corner and is highlighted with an orange border.

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

- 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**.

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

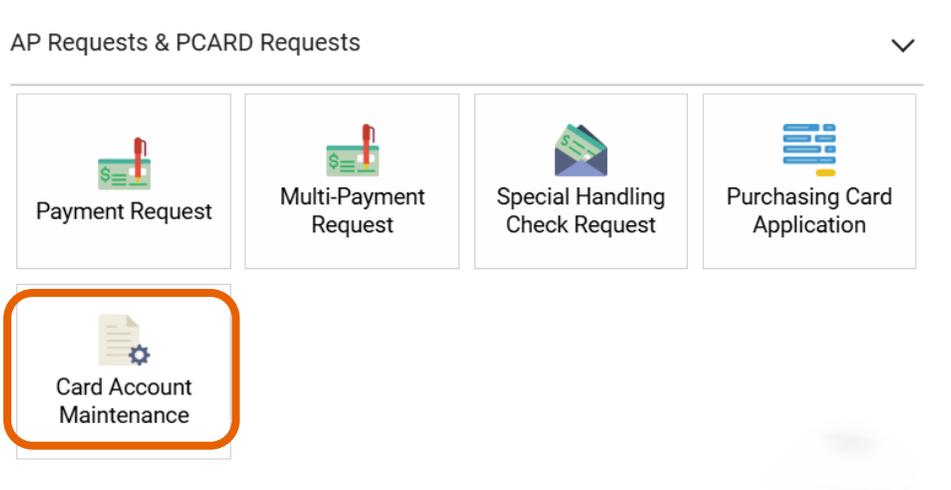
Section	Progress
Attachments	✓ Required Fields Complete
Questions	✓ Required Fields Complete

- 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.

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



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

Purchasing Card Account ...	Instructions	Request Actions History ?
Form Number 15182771 Purpose Generic Request Status Incomplete	This form is to be used for maintenance requests that need to be performed on existing purchasing card accounts. Please download the attached Maintenance Form. Once completed and signed, this form will need to be uploaded in the final section of this request.	
Instructions		
Attachments 		
Questions 		
Review and Submit		
Discussion		
Form Approvals		

Next >

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

Purchasing Card Account ... Attachments Request Actions | History | ?

Form Number 15182771
Purpose Generic Request
Status Incomplete

Instructions

#	Attachment	
1	PCARD Maintenance Form	Edit

Add Attachment

Questions ▲
Review and Submit
Discussion
Form Approvals

Previous Save Progress Next

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

Purchasing Card Account ... Questions - Cardholder Information Request Actions | History | ?

Form Number 1049653
Purpose Generic Request
Status Incomplete

Questions ▲

Cardholder Information ▲

Business Services ✓
Review and Submit
Discussion
Form Approvals

▼ On This Page
Cardholder Information (15)
LIMITS (3)

★ Response Is Required
Q Question Text Is Searchable

▼ Cardholder Information

TYPE OF REQUEST: *

Delete Account
 Change Existing Account

ACCOUNT INFORMATION CHANGED:

Name Address Department Monthly Credit Limit
 Single Transaction Limit Other

First Name *

Middle Initial *

Previous Save Progress Next

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

Purchasing Card Account ... Review and Submit Request Actions | History | ?

Form Number 1049653
Purpose Generic Request
Status Incomplete

Questions ✓
Cardholder Information ✓
Business Services ✓

Review and Submit

Discussion
Form Approvals

Required Fields Complete

Section	Progress
Questions	Required Fields Complete

Previous Add to Favorites Submit

- Requests are then submitted to PBS for review.



Auburn University TigerBuy

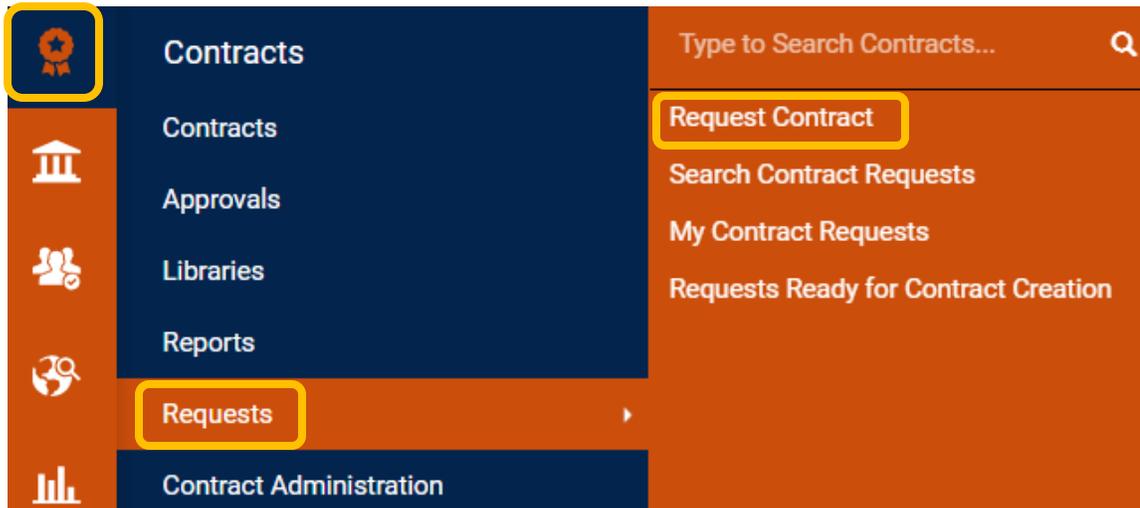
Module 8: Contracts

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.

Create Contract Request ×

Contract Request Name ★ ⓘ

Select a Contract Request Template ★ × 🔍

★ Required

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

[Back to My Contract Requests](#)

Test Contract [Print Request](#) | [History](#) | ?

Form Number: 1046270
Request Status: Incomplete

Instructions

Use this form to provide key information and documentation related to your request.

This request form will save your entries whenever you click the "Save Progress," "Previous," or "Next" buttons at the bottom of the page.

On the Attachments page, you can upload key documents, such as vendor-provided agreements, statements of work, etc.

The Questions section will ask for general information, such as the department making the request, the second party (vendor, supplier, or other business partner), and the nature of the engagement.

The Questions section will also ask you to indicate potential risks associated with this request. This section helps streamline the review process by identifying the appropriate stakeholders early in the process.

If you have any questions, contact the system administrator at:

[Next >](#)

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

Details [Print Request](#) | [History](#) | ?

Contract Request Name *

Template Contract Request

Contract Type -

Description -

Contract Request Type Create Contract

[Previous](#) [Save Progress](#) [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**.

Attachments [Print Request](#) | [History](#) | ?

[Add Attachments](#)

Request Attachments

Attachment	Size	Actions
TEST.docx	11 KB	Actions

[Previous](#) [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**.

Review and Complete [Print Request](#) | [History](#) | [?](#)

✓ Required fields complete

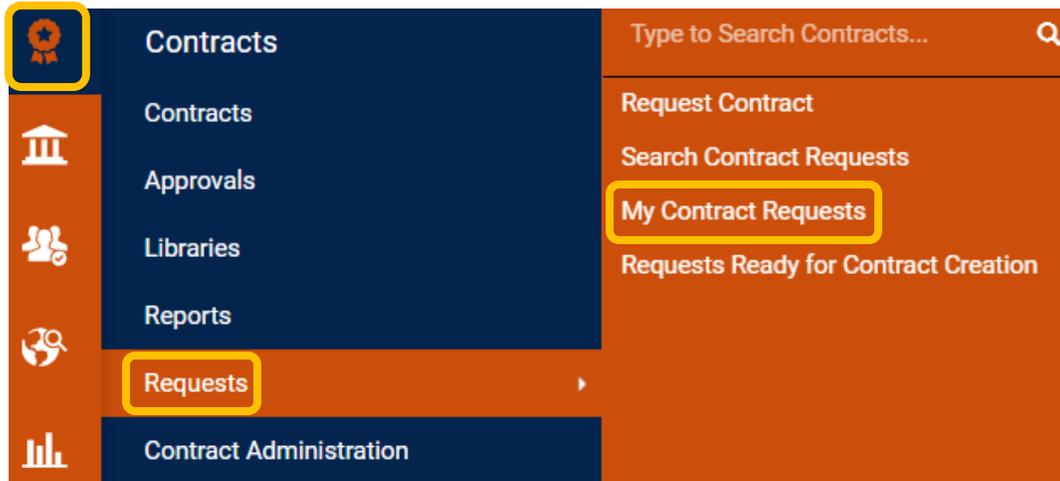
Section	Progress
Instructions	✓ No Required fields
Details	✓ No Required fields
Attachments	✓ No Required fields
Questions	✓ Required fields complete

★ Required
[← Previous](#)
[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.

My Contract Requests

[Filter Contract Requests](#)

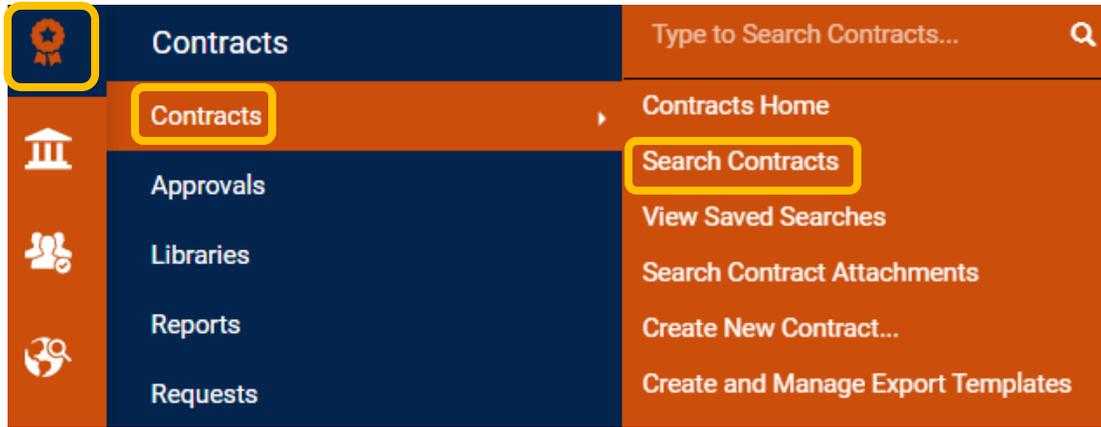
[Create New Contract Request](#)

Contract Request Name	Template	Requested By	Request Status	Workflow Step	Workflow Assignee	Status Last Updated	Created	
Test Contract	Contract Request	Tonya Hollis	Under Review	Queue Level 1	-	12/9/2024 4:03 PM	12/9/2024 3:57 PM	Actions ▼

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.

Search Contracts

[Advanced Search](#) | [?](#)

Contract ⓘ

Active for Shopping ▼

By Start/End Date ▼

Created Date ▼



Auburn University TigerBuy

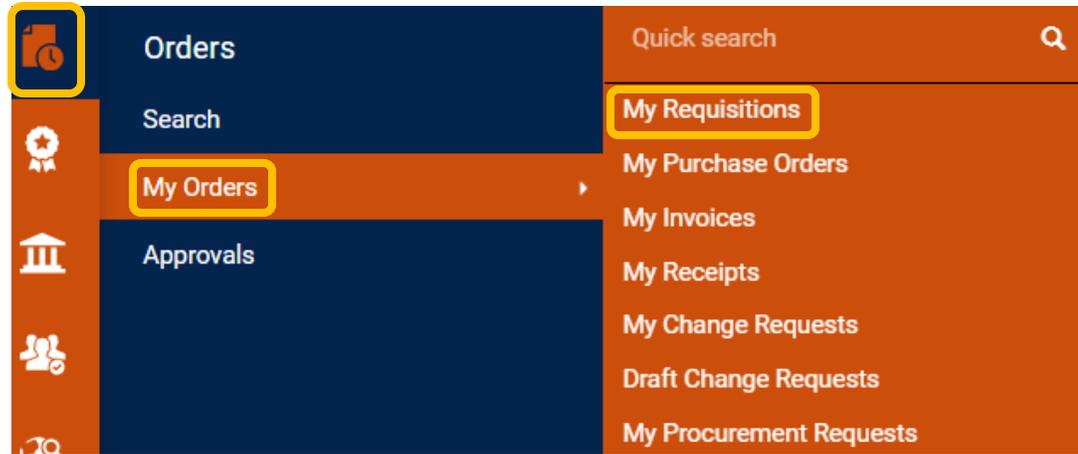
Module 9: Requisition/PO Inquiry and Change Requests

9.0 Viewing a Requisition

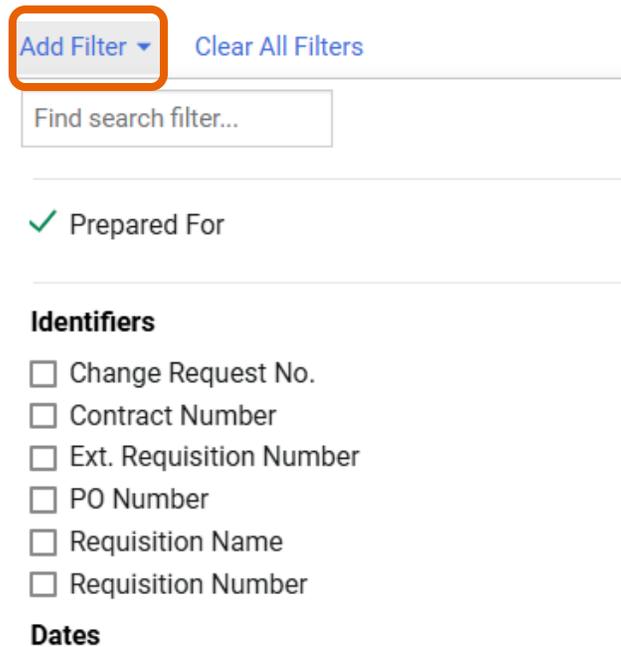
Target Audience: **All**

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.

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

Requisition • 4179208

4 of 16 Results

Summary Taxes/S&H Comments 1 Attachments History

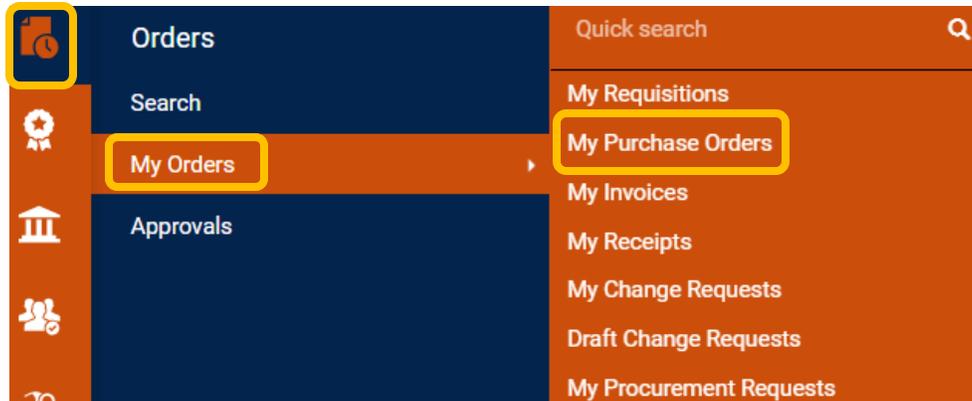
General	Shipping	Billing	Summary												
<p>Status Completed <small>(12/9/2024 2:03 PM)</small></p> <p>Submitted 12/9/2024 1:58 PM</p> <p>Cart Name 2024-12-09 tah0026 01</p> <p>Description no value</p> <p>Accounting Date no value</p> <p>AIM Reference No. no value</p> <p>Prepared by Tonya Hollis</p> <p>Prepared for Tonya Hollis</p> <p>Business Purpose Construction Project</p> <p>Has a Contract Request been completed? No</p>	<p>Ship To</p> <p>Contact Line 1 Tonya Hollis Phone Number +1 334-844-3637 PROCUREMENT AND BUSINESS SRVCS 212 INGRAM HALL AUBURN UNIVERSITY, AL 36849 United States</p> <p>Delivery Options</p> <p>Ship Via Best Carrier-Best Way</p> <p>Requested Delivery Date no value</p>	<p>Bill To</p> <p>Contact Line 1 Tonya Hollis Phone Number +1 334-844-3637 PROCUREMENT AND BUSINESS SRVCS 212 INGRAM HALL AUBURN UNIVERSITY, AL 36849 United States</p> <p>Credit Card info</p> <p>No credit card has been assigned.</p>	<p>Completed</p> <p>Total (1,250.00 USD)</p> <p>Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.</p> <table border="1"> <tr><td>Subtotal</td><td>1,250.00</td></tr> <tr><td>Tax1</td><td>0.00</td></tr> <tr><td>Tax2</td><td>0.00</td></tr> <tr><td>Shipping</td><td>0.00</td></tr> <tr><td>Handling</td><td>0.00</td></tr> <tr><td>Total</td><td>1,250.00</td></tr> </table> <p>Related Documents</p> <p>Purchase Order: P0082137</p> <p>Invoice: I-001116</p> <p>What's next?</p> <p>Workflow</p>	Subtotal	1,250.00	Tax1	0.00	Tax2	0.00	Shipping	0.00	Handling	0.00	Total	1,250.00
Subtotal	1,250.00														
Tax1	0.00														
Tax2	0.00														
Shipping	0.00														
Handling	0.00														
Total	1,250.00														

9.1 Viewing a Purchase Order (PO)

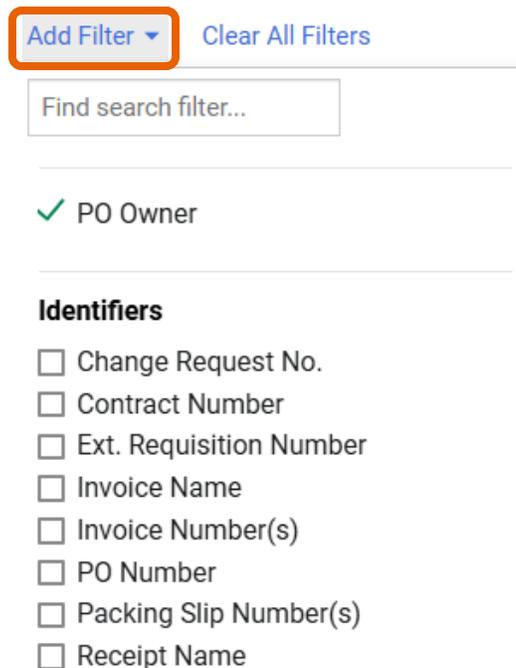
Target Audience: **All**

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.

Purchase Order • Wreck-It Ralph • P0082137 Revision 0

Status Summary Revisions 1 Confirmations Shipments Change Requests Receipts Invoices 1 Comments Attachments History

General Information	Shipping Information	Billing/Payment	Summary
PO/Reference No. P0082137 Revision No. 0 Total 1,250.00 AIM Reference No. no value Purchase Order Date 12/9/2024 Priority Normal Requisition Number 4179208 view print Supplier Name Wreck-It Ralph Address 576 Breakdown Lane Opelika, Alabama 36804 United States	Ship To Contact Line 1 Tonya Hollis Phone Number +1 334-844-3637 PROCUREMENT AND BUSINESS SRVCS 212 INGRAM HALL AUBURN UNIVERSITY, AL 36849 United States Ship To Address Code ING212 Delivery Options Expedite <input checked="" type="checkbox"/> Ship Via Best Carrier-Best Way Requested Delivery Date no value PO Clauses 1 Edit View details	Bill To Contact Line 1 Tonya Hollis Phone Number +1 334-844-3637 PROCUREMENT AND BUSINESS SRVCS 212 INGRAM HALL AUBURN UNIVERSITY, AL 36849 United States Bill To Address Code ING212 Billing Options Accounting Date no value Payment Terms F.O.B. Destination	Summary Completed Details Supplier Status Sent To Supplier Supplier Wreck-It Ralph Total (1,250.00 USD) Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals. Subtotal 1,250.00 Tax1 0.00 Tax2 0.00 Shipping 0.00 Handling 0.00 1,250.00

9.2 Viewing an Invoice

Target Audience: **Requisitioner**

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

The screenshot shows a navigation menu with a dark blue background and orange accents. The menu items are: Orders, Search, My Orders, Approvals, Quick search, My Requisitions, My Purchase Orders, My Invoices, My Receipts, My Change Requests, Draft Change Requests, and My Procurement Requests. The 'My Orders' and 'My Invoices' items are highlighted with yellow boxes.

- 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.

Add Filter ▼ [Clear All Filters](#)

Find search filter...

✓ Invoiced By

Identifiers

- Contract Number
- Invoice Batch Number(s)
- Invoice Master Number
- Invoice Name
- Invoice Number(s)
- PO Number
- Supplier Account Number(s)

- 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	4	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	4	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	4	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	4	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	4	0.00 USD	10/30/2024 11:39:38 AM	Manual	Non-PO Invoice	In Process	5,497.50 USD

- Invoice details will be shown

Invoice • Wreck-It Ralph • T-001112

Summary Matching Supplier Messages Comments Attachments 2 History

General

Invoice Type: Invoice

Pay Status: Payable

Invoice Number: T-001112

Supplier Invoice No.: INV#A2B2C2

Supplier Name: Wreck-It Ralph

Supplier No.: 904448544

Invoice Date: 10/31/2024

Submit Date: 10/31/2024

Due Date: 10/31/2024

Invoice Name: 2024-10-31 lah0026 01

Addresses

Remit To

123 Main Street
Opelika, Alabama 36804
United States
Phone 334-844-1000
Address KI VR Vendor-Remittance 1

Bill To

Contact Line 1 Tonya Hollis
Phone Number +1 334-844-3637
PROCUREMENT AND BUSINESS SRVCS
212 INGRAM HALL
AUBURN UNIVERSITY, AL 36849
United States

Payment Information

Accounting Date: 10/31/2024

Note/Attachments

External Note: no value

Internal Notes: no value

External Attachments: Add

Internal Attachments

Attachment	Date	Action
TEST.docx	10/31/2024	...
TEST.docx	10/31/2024	...

Summary

Wreck-It Ralph

Supplier Invoice No.: INV#A2B2C2

Total (5,497.50 USD)

Subtotal	5,497.50
Discount	0.00
Tax1	0.00
Tax2	0.00
Shipping	0.00
Handling	0.00
Withholding Tax 1	0.00
Total	5,497.50

Related Documents

Purchase Order: P0082131

Requisition: 4152751

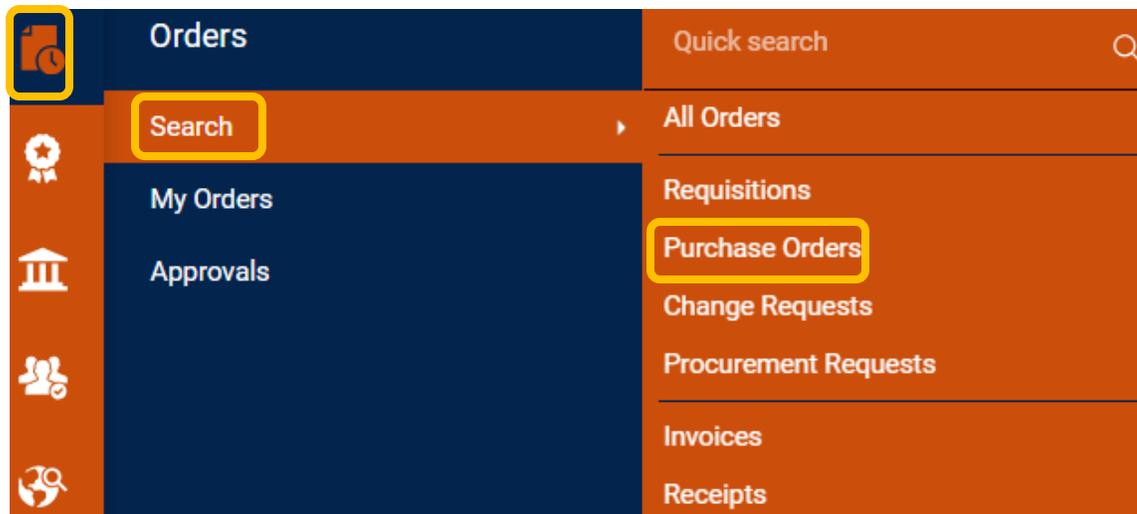
9.3 Submitting a Change Request

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.

A screenshot of the 'Search Purchase Orders' page in the TigerBuy system. The page title is 'Search Purchase Orders' with a help icon. There are options for 'Save As', 'Pin Filters', and 'Export All'. Below the title, there are 'Quick Filters' and 'My Searches' tabs. A search bar contains 'Created Date: Last 90 days' and a 'Quick search' button. The table shows 1-12 of 12 results. The first row is highlighted with a yellow box. The table columns are: PO Number, Supplier, Created Date/Time, PO Status, Requisition Number, PO Owner, Shipment Status, Matching Status, and Total Amount.

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	Stuffys 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

- 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).

Purchase Order • Wreck-It Ralph • P0082137 Revision 0

Status Summary Revisions 1 Confirmations Shipments Change Requests Receipts Invoices 1 Comments Attachments

1 of 12 Results

Dropdown menu options: Add Comment, **Create Change Request**, Add Notes to History, Add Discount, Cancel PO, Finalize Revision, Create Receipt, Create Credit Memo, Create Invoice, Print Fax Version

General Information	Shipping Information	Billing/Payment
PO/Reference No. P0082137	Ship To Contact Line 1 Tonya Hollis Phone Number +1 334-844-3637 PROCUREMENT AND BUSINESS SRVCS 212 INGRAM HALL AUBURN UNIVERSITY, AL 36849 United States	Bill To Contact Line 1 Tonya Hollis Phone Number +1 334-844-3637 PROCUREMENT AND BUSINESS SRVCS 212 INGRAM HALL AUBURN UNIVERSITY, AL 36849 United States
Revision No. 0	Ship To Address ING212 Code	Bill To Address ING212 Code
Total 1,250.00	Delivery Options Expedite <input checked="" type="checkbox"/>	Billing Options Accounting Date no value
AIM Reference No. no value	Ship Via Best Carrier-Best Way	Payment Terms
Purchase Order Date 12/9/2024	Requested Delivery Date no value	F.O.B. Destination
Priority Normal		
Requisition Number 4179208 view print		
Supplier Name Wreck-It Ralph		
Address 576 Breakdown Lane Opelika, Alabama 36804 United States		

Summary	
Total (1,250.00 USD)	1,250.00
Subtotal	1,250.00
Tax1	0.00
Tax2	0.00
Shipping	0.00
Handling	0.00
Total	1,250.00

- 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.

Create Change Request
✕

Tonya Hollis (Prepared by, Prepared for) <tah0026@auburn.edu>

User with change request permission:

Christalyn Thomas (Approved) <cmc0122@auburn.edu>

David Moore (Approved) <issadmn@auburn.edu>

John Corgill (Approved) <jpc0004@auburn.edu>

Kell Auburn Test (Approved) <khalil.ali3+auburn@gmail.com>

Laura Gray (Approved) <pbsadmn@auburn.edu>

[add email recipient...](#)

Change Request Reason

Please make change to include funds for shipping that was not included in the original quote.

907 characters remaining [expand](#) | [clear](#)

Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

Attach file to this change request (optional):

Attachment Type File

Create Change Request
Close

- 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.

Change Requests • 4185012

Assign Draft **Submit Request**

Summary Taxes/SSH PO Preview External Communication Comments 1 Attachments History

Changes will not be sent to the Supplier.

Change Request Reason

Reason Please make change to include funds for shipping that was not included in the original quote.

General	Shipping	Billing
Cart Name 2024-12-09 tah0026 01 - CR	Ship To	Bill To
Description no value	Contact Line 1 Tonya Hollis Phone Number +1 334-844-3637 PROCUREMENT AND BUSINESS SRVCS 212 INGRAM HALL AUBURN UNIVERSITY, AL 36849 United States	Contact Line 1 Tonya Hollis Phone Number +1 334-844-3637 PROCUREMENT AND BUSINESS SRVCS 212 INGRAM HALL AUBURN UNIVERSITY, AL 36849 United States
Accounting Date no value		
AIM Reference No. no value		
Prepared by Tonya Hollis	Delivery Options	Credit Card Info
Prepared for Tonya Hollis	Ship Via Best Carrier-Best Way	No credit card has been assigned.

Summary Draft

Be aware of these issues. You may review and proceed.

This Change Request has one or more fully/over-invoiced lines (Line 1, Line 2). Matching will not be updated on fully/over-invoiced lines.

Total (1,250.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	1,250.00
Tax1	0.00
Tax2	0.00
Shipping	0.00
Handling	0.00
Total	1,250.00

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.

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

Change Request 4185012 Submitted

Summary

Change Request number	4185012
Change Request status	Pending
Cart name	2024-12-09 tah0026 01 - CR
Change Request date	12/16/2024
Change Request total	1,250.00 USD
Number of line items	2

Options

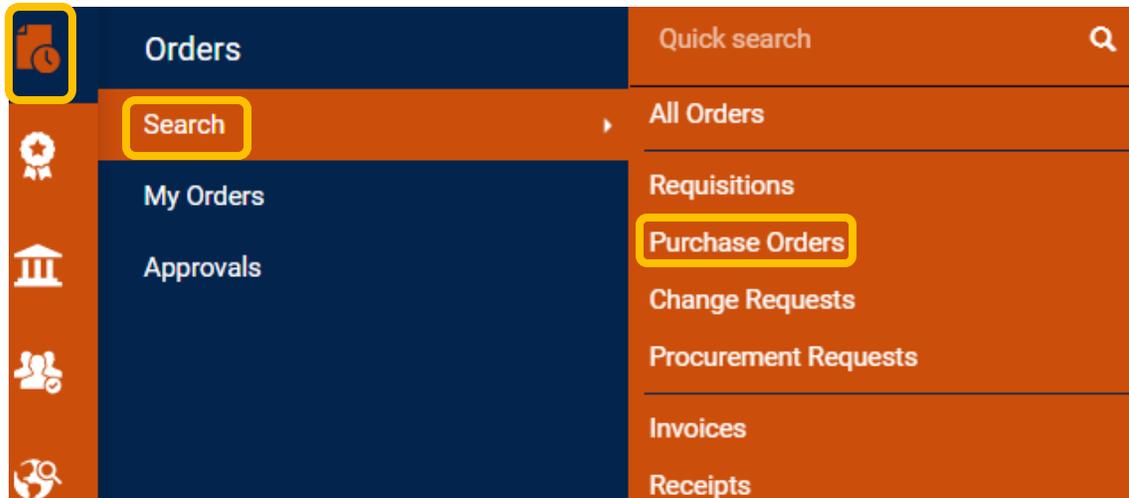
- Print
- Recent orders
- Return to your home page

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	Stuff'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

- 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).

Purchase Order • Wreck-It Ralph • P0082135 Revision 1

The screenshot shows the 'Purchase Order' interface for 'Wreck-It Ralph' with PO number 'P0082135 Revision 1'. The top navigation bar includes tabs for Status, Summary, Revisions (2), Confirmations, Shipments, Change Requests (1), Receipts (1), Invoices (1), and Comments (1). A dropdown menu is open next to the PO number, with 'Create Change Request' highlighted in orange. Other options in the menu include 'Add Comment', 'Add Notes to History', 'Add Discount', 'Cancel PO', 'Finalize Revision', 'Create Receipt', 'Create Credit Memo', 'Create Invoice', and 'Print Fax Version'. The main content area is divided into sections: General Information, Shipping Information, and Billing/Payment. The General Information section shows PO/Reference No. P0082135, Revision No. 1, Total 1,000.00, AIM Reference No. no value, Purchase Order Date 12/3/2024, Priority Normal, Requisition Number 4174914, and Supplier Name Wreck-It Ralph. The Shipping Information section shows Ship To: Contact Line 1 Matthew Pike, Phone Number +1 334-844-3630, PROCUREMENT AND BUSINESS SRVCS, 212 INGRAM HALL, AUBURN UNIVERSITY, AL 36849, United States. The Billing/Payment section shows Bill To: Contact Line 1 Matthew Pike, Phone Number +1 334-844-3630, PROCUREMENT AND BUSINESS SRVCS, 212 INGRAM HALL, AUBURN UNIVERSITY, AL 36849, United States. A summary table on the right shows a total of 1,000.00 USD.

- 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.

Create Change Request
✕

This will create a change request for this purchase order. If you select a user they will receive an email indicating that a change request has been created for this purchase order.

Email notification(s) | [Add recipient](#)

Matthew Pike (Prepared by, Approved Requisition, Prepared for) <pkemat@auburn.edu>

User with change request permission:

Christalyn Thomas (Approved) <cmc0122@auburn.edu>

David Moore (Approved) <issadm@auburn.edu>

John Corgill (Approved) <jpc0004@auburn.edu>

Kell Auburn Test (Approved) <khalil.ali3+auburn@gmail.com>

Laura Gray (Approved) <pbsadm@auburn.edu>

[add email recipient...](#)

Change Request Reason

Paid invoice outside of PO. no longer need balance.

949 characters remaining [expand](#) | [clear](#)

Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

Create Change Request
Close

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

Wreck-It Ralph · 10 Items · 1,000.00 USD

^ SUPPLIER DETAILS VO Vendor-Order (Use for PO) 2 : 576 Breakdown ...

Contract no value PO Number P0082135

Quote number no value PO Clauses

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 Test		EA	100.00	10 EA	1,000.00

^ ITEM DETAILS

Contract: no value Internal Note no value

Internal Attachments Add

External Note no value

Attachments for supplier Add

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

Non Catalog Item

Wreck-It Ralph

Fulfillment Address VO Vendor-Order (Use for PO) 2 - 576 Breakdown Lane, Opelika, Alabama 36804 United States

Item

Product Description *	Catalog No.	Quantity *	Price Estimate	Packaging
Test		10	0 USD	Each

Additional Details

★ Required fields

Save Close

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

Assign Draft Submit Request

Summary →

Draft

Total (0.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	0.00
Tax1	0.00
Tax2	0.00
Shipping	0.00
Handling	0.00
	0.00

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

✓ **Change Request 4185053 Submitted**

Summary	Options
Change Request number 4185053	Print
Change Request status Pending	Recent orders
Cart name 2024-12-03 pikemat 02 - CR(2)	Return to your home page
Change Request date 12/16/2024	
Change Request total 0.00 USD	
Number of line items 1	

9.5 Closing a PO

Target Audience: **Approver**

- 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.

Completed

Total (0.00 USD) ▼

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	0.00
Tax1	0.00
Tax2	0.00
Shipping	0.00
Handling	0.00
	0.00

Related Documents ▼

[Purchase Order: P0082135](#)

[Requisition: 4174914](#)

🖨️

🖨️

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

Purchase Order • Wreck-It Ralph • P0082135 Revision 2

Status Summary Revisions 3 Confirmations Shipments Change Requests 3 Receipts 1 Invoices 1 Comments 3

General Information	Shipping Information	Billing/Payment
PO/Reference No. P0082135	Ship To	Bill To
Revision No. 2	Contact Line 1 Matthew Pike Phone Number +1 334-844-3630 PROCUREMENT AND BUSINESS SRVCS 212 INGRAM HALL AUBURN UNIVERSITY, AL 36849 United States	Contact Line 1 Matthew Pike Phone Number +1 334-844-3630 PROCUREMENT AND BUSINESS SRVCS 212 INGRAM HALL AUBURN UNIVERSITY, AL 36849 United States
Total 0.00	ShipTo Address Code ING212	BillTo Address Code ING212
AIM Reference No. no value	Delivery Options	Billing Options
Purchase Order Date 12/3/2024	Expedite <input checked="" type="checkbox"/>	Accounting Date no value
Priority Normal	Ship Via Best Carrier-Best Way	Payment Terms
Requisition Number 4174914 view print	Requested Delivery Date no value	F.O.B. Destination
Supplier Name Wreck-It Ralph		
Address 576 Breakdown Lane Opelika, Alabama 36804 United States		

Finalize Revision

Create Receipt

Create Credit Memo

Create Invoice

Print Fax Version

Send Test PO

Soft Close PO

Close PO

Add Non-Catalog Item

See configuration for this purchase order

Total (0.00 US\$)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	0.00
Tax1	0.00
Tax2	0.00
Shipping	0.00
Handling	0.00
Total	0.00

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

Add Note
✕

Specify the reason for changing the A/P status to closed.

Only needed to pay rent for 9 months. The rest was outside of the PO.

[expand](#) | [clear](#)

Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

OK

Cancel

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

Purchase Order • [Wreck-It Ralph](#) • P0082135 Revision 2 (Closed)

Status Summary Revisions 3 Confirmations Shipments Change Requests 3 Receipts 1 Invoices 1 Comments 4 Attachments History

General Information		Document Status		Summary	
PO/Reference No.	P0082135	A/P status	Closed	Completed	
Revision No.	2	Workflow	✓ Completed (12/16/2024 11:32 AM)	Details	
Supplier Name	Wreck-It Ralph	The system distributed the purchase order using the method(s) indicated below the last time it was distributed: view		Supplier Status	
Purchase Order Date	12/3/2024	Email (HTML Body)	wreckit@gmail.com	Sent To Supplier	
Total	0.00	Distribution Date/Time	12/3/2024 2:38 PM	Supplier	
Owner Name	Matthew Pike	Supplier	Sent To Supplier	Wreck-It Ralph	
Owner Phone	+1 334-844-3630			Total (0.00 USD)	
Owner Email	pikemat@auburn.edu			Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.	
Requisition Number	4174914 view print			Subtotal	0.00
Internal PO Ref #:	4181115			Tax1	0.00
Line Details				Tax2	0.00
				Shipping	0.00
				Handling	0.00
				Total	0.00