**Shopping Dashboard:**

The Purchasing Home Page contains TTUHSC El Paso’s vendor punch-outs, hosted catalogs and forms. Suppliers can be found by their company icon or by the supplier name in the Shopping Dashboard Showcase.

**Classic View**
New View

[Image of a web page highlighting search options, punchout vendor selection, and hosted catalog vendor]

- Search Options
- Section for punchout vendor selection
- Punchout Vendor
- Hosted Catalog Vendor
You can find the changes/updates regarding the purchase orders.
You can find the changes/updates regarding the purchase orders.
Checking out:

A vendor website in which a user actually accesses vendor's site through the TechBuy system. Upon completing checkout, the user is returned to TechBuy to complete the requisition. This is a contract vendor; special pricing and other benefits such as free shipping are received when accessed through the TechBuy System. Each punch-out has different capabilities.
Changing Cart Name:
Classic View

Rename cart if desired

Click Here
Ship to Address:

The default ship-to address in the users profile is applied to each requisition created. This ship-to can be modified within the requisition.

To modify ship to information, select the edit box to the right of the Shipping Address information. A window opens with options to edit the current shipping address; select from stored ship-to addresses.
If needed, edit the selected address.

Address options are – Use, Edit, and Delete. Default ship to can be modified as well.

Search by building name or shipping code.
If needed, edit the selected address.

Address options are – Use, Edit, and Delete. Default ship to can be modified as well.

MSC Codes only

Search by building name or shipping code.
Change Accounting Date:
Edits to the Accounting Date may be made in this area. The accounting date should not be modified from the date of purchase unless you are encumbering funds for the next fiscal.

Classic View

Almost ready to go! The list below needs to be addressed before the request can be submitted.

- [ ] Change Accounting Date
- [ ] Corrected Accounting Date
- [ ] Corrected Cost Center
- [ ] Corrected Grant
- [ ] Corrected Project
- [ ] Corrected Requested Proposal
- [ ] Change Requested Proposal

Please select the date of purchase.
At this point, the entire requisition will be charged to the FOAP shown in the Line and Header FOAP Summary area. The **Account Code** within the FOAP is what identifies what is being purchased. If there are multiple types of items on the requisition, the account code must be entered for each item.

1. Select “Edit” to the right of the FOAP details to change funding information for the entire requisition.

Please select the date of purchase

Edit “Bill To” or select billing date.
2. In the window that opens, alternate values may be selected from profile values if these have been added to the user’s profile. Otherwise, the select from all values link may be utilized in finding the code or if the code is known, simply type in the field provided, ending with a dash –E. Once the changes have been made, select SAVE. To cancel, select cancel.
**Internal Notes and Attachments:**

The notes or attachments included here are visible only within the institution and not to the vendor. To add an attachment select add attachment and proceed like for an email attachment. To type an internal note click edit and enter information in the field provided. Select save when finished. The notes or attachments are for Payments Services / Purchasing. ARTWORK OR QUOTES SHOULD NOT BE ADDED TO THE INTERNAL NOTES SECTION.

**Classic View**

[Diagram of Classic View]

- Click to add an internal attachment
- Click edit to add an internal note

**New View**

[Diagram of New View]

- Click edit to add an internal note
- Click ADD to add an internal attachment
External Notes and Attachments:

**This section is used for things such as quotes, artwork and notes to vendor.** The notes or attachments included here are visible to the vendor as well as within the institution. To add an attachment, select the link titled add attachment. To include a note, select the edit button typing the note in the field provided. Select save when finished. **Ship to addresses should not be entered in this area.**

**Classic View**

<table>
<thead>
<tr>
<th>External Notes and Attachments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Note to all Suppliers</td>
</tr>
<tr>
<td>Attachments for all suppliers</td>
</tr>
<tr>
<td>PO Clauses</td>
</tr>
</tbody>
</table>

**New View**

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<tr>
<td>Attachments for all suppliers</td>
</tr>
<tr>
<td>PO Clauses</td>
</tr>
</tbody>
</table>

Click to add an external attachment

Click edit to add external note

Click to add an external attachment

Click edit to add external note
Review Requisition before Submittal:

Once the final review is complete, the next step is Submit Requisition or Assign Cart. Assign cart would be used when a specific person is to take action on the requisition. After you submit the requisition and it is approved by all internal approvers, it becomes Purchase Order. A PO is a legally binding document. Once created, it is usually difficult to cancel an order. Requisitions should not be submitted unless the department is sure they want to order the goods or services.

Classic View
### New View

**Regulation**: 141105/756

#### General
- **Name**: 2021-02-23-DOE812-01
- **Description**: no value
- **Priority**: Normal
- **Prepared by**: Liliana Guerero
- **Prepared for**: Liliana Guerero
- **Principal Investigator**: no value
- **Purchase Order Classification**: no value

#### Shipping
- **Ship To**
  - **Contact Name**: Liliana Guerero
  - **Phone**: +1 915.855.9000
  - **Email**: liliana.guerero@utexas.edu
  - **Addr 1**: 5021 El Paso Dr, Med Res Bldg
  - **Addr 2**: Bldg 05001010
  - **City**: El Paso
  - **State**: TX
  - **ZIP**: 79999
  - **Country**: United States

#### Billing
- **Bill To**
  - **Address**: TTUHSC at El Paso Accounts Payables
  - **Street**: 5021 El Paso Dr
  - **City**: El Paso
  - **State**: TX
  - **ZIP**: 79999
  - **Country**: United States

#### Billing Options
- **Accounting Date**: 2/26/2021

---

**Draft**

- **Total**: 32.37 USD
  - **Subtotal**: 32.37 USD
  - **Tax**: 0.00 USD

**What's next for my order?**
- **Next Step**: Budget Authorization
- **Approvers**: Automatically calculated by system

**Workflow**
- **Status**: Draft
- **Active**: Liliana Guerero

---

### Page | 19
**Approval of Requisitions:**

**Classic View**

![Image of Approval of Requisitions: Classic View]

- **Available Actions:**
  - Approve/Complete Step & Show Next
  - Approve/Complete Step
  - Copy to New Cart
  - Add Comment
  - Add Note to History

- **Summary Section:**
  - Status: Pending
  - Submitted: 12/01/2023 1:32:09 AM
  - Cart Name: [Details]
  - Description: [Details]
  - Priority: Normal
  - Prepared by: [Name]
  - Principal Investigator: [Name]

- **Shipping Section:**
  - Destination Name: [Details]
  - Email: [Email]
  - Phone: [Phone]
  - Contact: [Name]

- **Billing Section:**
  - Due To: [Details]
  - Terms: [Details]
  - Accounting Date: [Date]

- **Additional Information:**
  - Cardinal Account Code: [Details]
  - Delivery Options: [Details]
  - Shop Via: [Details]
New View

You have 2 places where you can select the different actions.

PO Approval Workflow and clicking the arrow show who has authority to approve.
Line Header FOAP:

Classic View

"Recalculate" button after updating information need to click here
### Line and Header FOAP Summary

<table>
<thead>
<tr>
<th>Chart</th>
<th>Fund</th>
<th>Organization</th>
<th>Organization - Banner</th>
<th>Account</th>
<th>Program</th>
<th>Program - Banner</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>533000-E</td>
<td>133000-E</td>
<td>Internal Medicine Dept.</td>
<td>Internal Medicine Dept.</td>
<td>533701</td>
<td>33530-E</td>
<td>33530-E</td>
<td></td>
</tr>
</tbody>
</table>

For selected line item: Change Supplier

### Fastsigns - El Paso
Above info:
PO Purchase Order 1
1251 Allied Blvd Ste D4, El Paso, TX 79925-2857 US

<table>
<thead>
<tr>
<th>Product Description</th>
<th>Catalog No</th>
<th>Size / Packaging</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Ext. Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acrylic 25 (1/4&quot;) (56x36)</td>
<td>1/EA</td>
<td>240.00</td>
<td>1EA</td>
<td>240.00</td>
<td></td>
</tr>
</tbody>
</table>

Funding Information

<table>
<thead>
<tr>
<th>Chart</th>
<th>Fund</th>
<th>Organization</th>
<th>Organization - Banner</th>
<th>Account</th>
<th>Program</th>
<th>Program - Banner</th>
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</tr>
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<tr>
<td>533000-E</td>
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<td>Internal Medicine Dept.</td>
<td>Internal Medicine Dept.</td>
<td>533701</td>
<td>33530-E</td>
<td>33530-E</td>
<td></td>
</tr>
</tbody>
</table>

Select from all values...  Select from all values...  Select from all values...  Select from all values...  Select from all values...  Select from all values...  Select from all values...  Select from all values...
New View

Requisition: 1412D5501

Line and Header FOAP Summary

Chart: 103001
Fund: 103001-E
Organization: Texas Tech University
Organization - Banner: Texas Tech University
Account: 713150-E
Program: 50
Program - Banner: Student Services
Activity: 50

Click here to add split FOAPs

"Recalculate" - button after updating information need to click here
### Internal/External Notes and Attachments:

#### Classic View

<table>
<thead>
<tr>
<th>Internal Notes and Attachments</th>
<th>External Notes and Attachments</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1" alt="Image of Add Attachments" /></td>
<td><img src="image2" alt="Image of Add Attachments" /></td>
</tr>
</tbody>
</table>

**Add Attachments**

- **Attachment Type**: File
- **File**: Select Files, Link
- Maximum upload file size: 24.14 MB

**Edit PO Clauses**

<table>
<thead>
<tr>
<th>Class No.</th>
<th>Class Name</th>
<th>Class Text</th>
<th>Assigned</th>
</tr>
</thead>
<tbody>
<tr>
<td>20</td>
<td>TV Emergency &amp; Safety Procedures</td>
<td>Emergency Health and Safety Procedures. In the event of pandemic, epidemic, civil unrest, heat...</td>
<td>Yes</td>
</tr>
<tr>
<td>21</td>
<td>Art Approval</td>
<td>Art Approval</td>
<td>No</td>
</tr>
<tr>
<td>22</td>
<td>Benchmark Contract Clause</td>
<td>Benchmark Contract Clause</td>
<td>No</td>
</tr>
</tbody>
</table>

**Internal Note**

- **Event Title**: no value
- **Date**: 2/26/2021
- **Size**: 28.9 KB

**External Notes and Attachments**

- **Attachments for all suppliers**: no value
- **Date**: no value

**Edit PO Clauses**

- **Class No.**: 20
- **Class Name**: TV Emergency & Safety Procedures
- **Class Text**: Emergency Health and Safety Procedures. In the event of pandemic, epidemic, civil unrest, heat...
- **Assigned**: Yes

**Internal Note**

- **Event Title**: no value
- **Date**: 2/26/2021
- **Size**: 28.9 KB
- **File**: Select Files, Link
- Maximum upload file size: 24.14 MB

**Edit PO Clauses**

- **Class No.**: 20
- **Class Name**: TV Emergency & Safety Procedures
- **Class Text**: Emergency Health and Safety Procedures. In the event of pandemic, epidemic, civil unrest, heat...
- **Assigned**: Yes

**Internal Note**

- **Event Title**: no value
- **Date**: 2/26/2021
- **Size**: 28.9 KB
- **File**: Select Files, Link
- Maximum upload file size: 24.14 MB
Supplier and Line Item Details:

**Classic View**

<table>
<thead>
<tr>
<th>Product Description</th>
<th>Catalog No</th>
<th>Size / Packaging</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Ext. Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acrylic 25 (1/4&quot;) (Sticky)</td>
<td></td>
<td></td>
<td>249.00</td>
<td>1 EA</td>
<td>249.00 USD</td>
</tr>
</tbody>
</table>

**Specifications/Long Text**
- Acrylic 1870 (2x18") with cut or printed vinyl applied.
- Del/counter Guard with 2" x 1.4" opening

**Commodity Code**
- No value

**Internal Notes**
- Internal note 1
- Internal note 2

**External Notes**
- External note 1
- External note 2
Comments Section:

Classic View

Click here to add a new comment
Enter comment here

Click here to add comment once completed

Click here to search and add the email of a different person not currently listed above

Click here to select the person(s) you want to send the comment

Click here to cancel/delete comment

Click here to search and attach a document to the comment
Receipts: Classic View

Select "Create Quantity Receipt" and click GO

Enter packing slip # if available

Select a Carrier and enter tracking # if available

Enter actual date goods are physically received or the last date of service provided

Comments added to receipt are only viewable when accessing the receipt

Select a Carrier and enter tracking # if available

Can be used to enter invoice #
Enter anything you believe will assist us or your department.

After selecting line items to be removed, click "Go".

Unselect line items not received.

Click here when complete.
Receipt No. **17233365** has been created for the following PO No(s): 

- PO/Reference No. **P0615967**

Click here to view receipt
Select “Create Quantity Receipt” and click GO

Enter actual date goods are physically received or the last date of service provided

Comments added to receipt are only viewable when accessing the receipt

Enter packing slip # if available

Select a Carrier and enter tracking # if available

Can be used to enter invoice #
Attach packing slip/invoice if available

Enter anything you believe will assist us or your department

After selecting line items to be removed, click “Go”

Unselect line items not received

Click here when complete
Click here to view receipt