Eagle Buy

TENNESSEE TECH

Approver Training Session

A Few Words about Purchasing and Ethics

1. All Tennessee Tech Policies can be found in Policy Central at https://www.tntech.edu/policies/

2. **Policy No. 600 – Code of Conduct** – provides guidance on how employees should conduct themselves in an ethical and responsible manner.

3. Employees are expected to conduct themselves fairly, honestly, in good faith, and in accordance with the highest ethical and professional standards and to comply with applicable laws, regulations, contractual obligations, and Tennessee Tech policies.

4. **Policy No. 570** and **Policy No. 571** specifically address issues related to Purchasing and Contracts.

Authority and Responsibility

Depending on your departmental role and Eagle Buy role, you may be given signature authority or supervision of Tennessee Tech resources.

In order to protect yourself and Tennessee Tech from misuse:

- Employees are to be trained in the delegated authority
- Authority must be specific and detailed
- The same employee may not sign/approve twice where two separate approvals are required by policy.

Policy for Assigning Approval Folder

1. **Delegation of Signature Authority TTU Policy No. 512.**

2. Substitution assignments can only be made to an approved signatory designee or a supervisor (or his/her designee).

3. Signatory designees must be approved by the V.P. for Planning and Finance.

4. Requestors cannot be substitutes for Approvers (or vice versa).

Roles

1. Shopper – These users can shop for items, but cannot submit a cart.

2.Requestor/Requisitioner – These users can shop for items and submit carts (that they created or are assigned from a shopper)

3.Approver – These users can review and approve or reject purchase orders that flow to them.

4.Contract Manager – These users are responsible for creating and editing contracts.

5.Administrator – These users can make changes to site configuration, user information, suppliers, etc.

We have a TEST instance of Eagle Buy which allows users to practice tasks in Eagle Buy without affecting actual account balances.

Eagle Buy TEST:

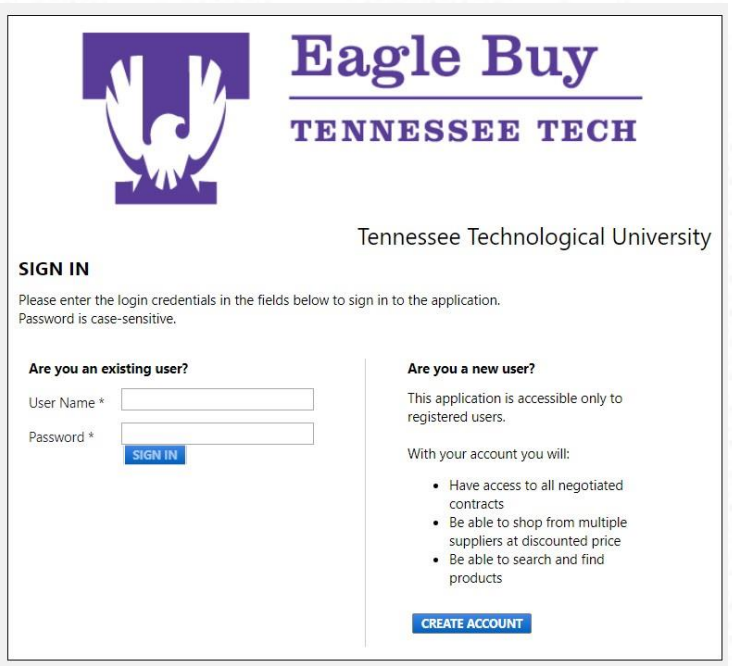
1. Go to the TTU Purchasing Training Website: https://www.tntech.edu/purchasing/training.php
2. Scroll to the bottom of the page and click on “Eagle Buy Test Login”

User Name is the same as your system user name and/or first part of your email address.

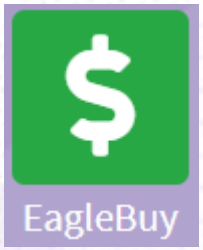
Password is the same as your system password.

Eagle Buy LIVE:

1. Eagle Buy can only be accessed via the TechExpress portal, at: https://express.tntech.edu/index.php



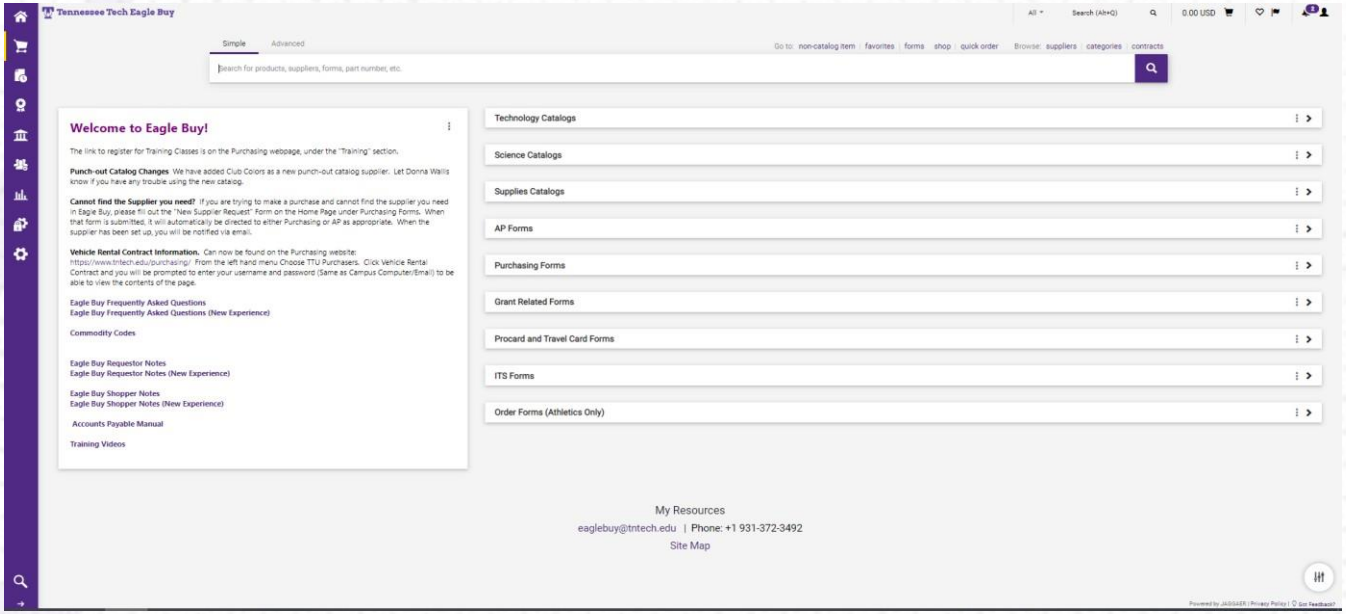
New users can ask Emily Vaughn to be added as users to Eagle Buy.



When logged into Tech Express find this Button and add it to your QuickLinks.

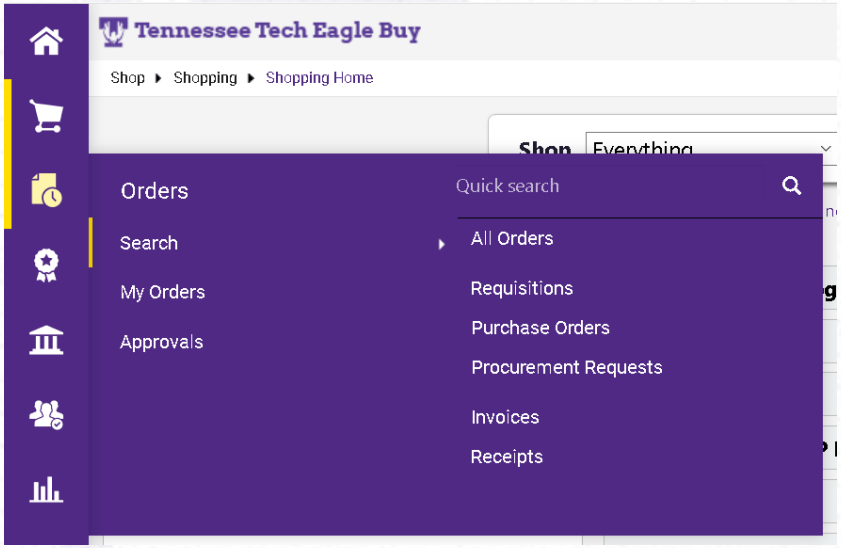
Home Page - Navigation and Help

- The Home Page is the place to start if you want to use a punch-out catalog. The catalogs are divided up into different categories. Tech has contracts in place with these featured companies, so purchases can be made without concern about competitive bidding.
- For purchases other than the catalog suppliers, a user can choose the “non-catalog item” link, and create a purchase requisition from any company loaded into Eagle Buy.
- The Home Page is also the place to start if you need to submit certain forms, such as a Procard Request Form, or if you need the Purchasing and Contracts Office to execute a contract for your department.
- To search for suppliers, contracts, or specific items, use the search bar at the top of the page. For instance, if you wondered what items are on contract with a certain supplier, type in the supplier’s name and then click the magnifying glass.
- The “Welcome to Eagle Buy” message box also provides FAQ’s, notes, and training materials.

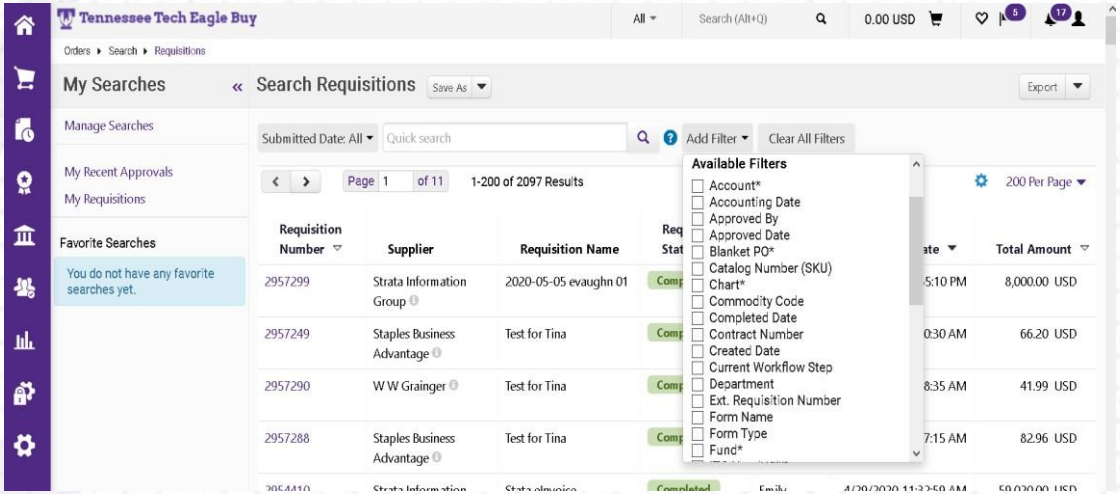


Document Search

1. Navigate to the Document Icon (Looks like a piece of paper and a clock). Click on the Document Type that you are trying to Search for.

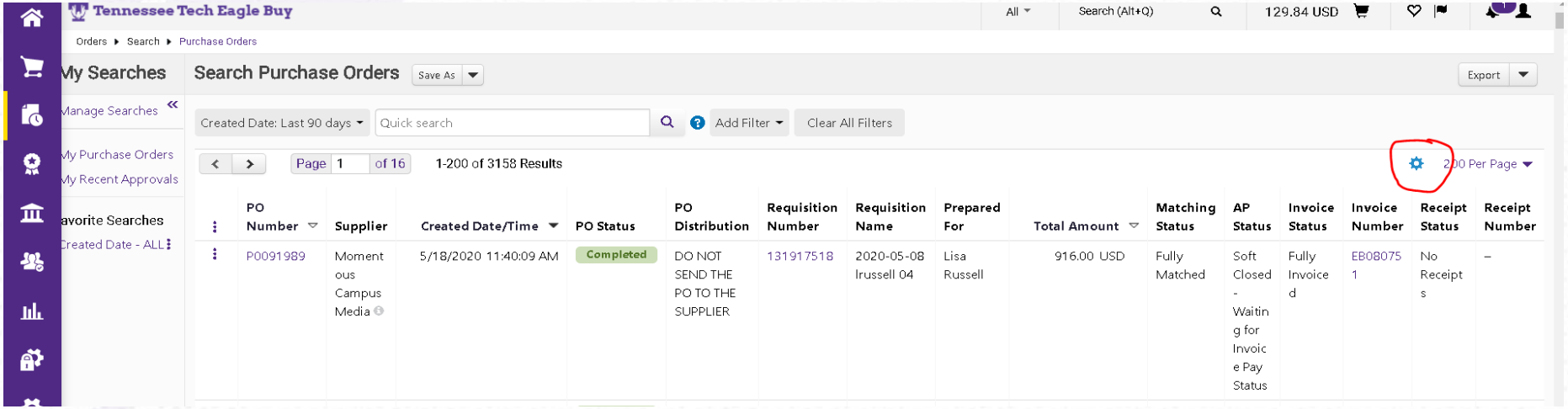


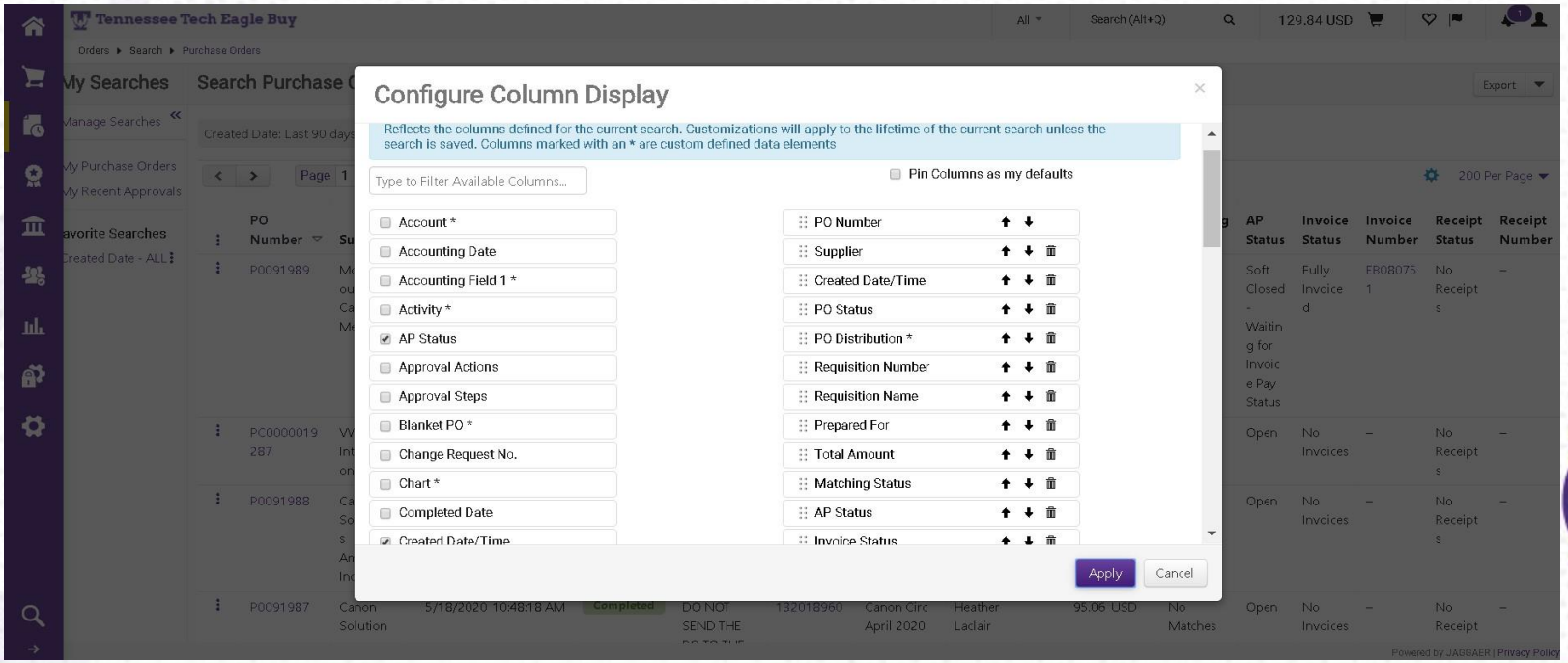
2. Change and add filters till you get the desired results that you need.



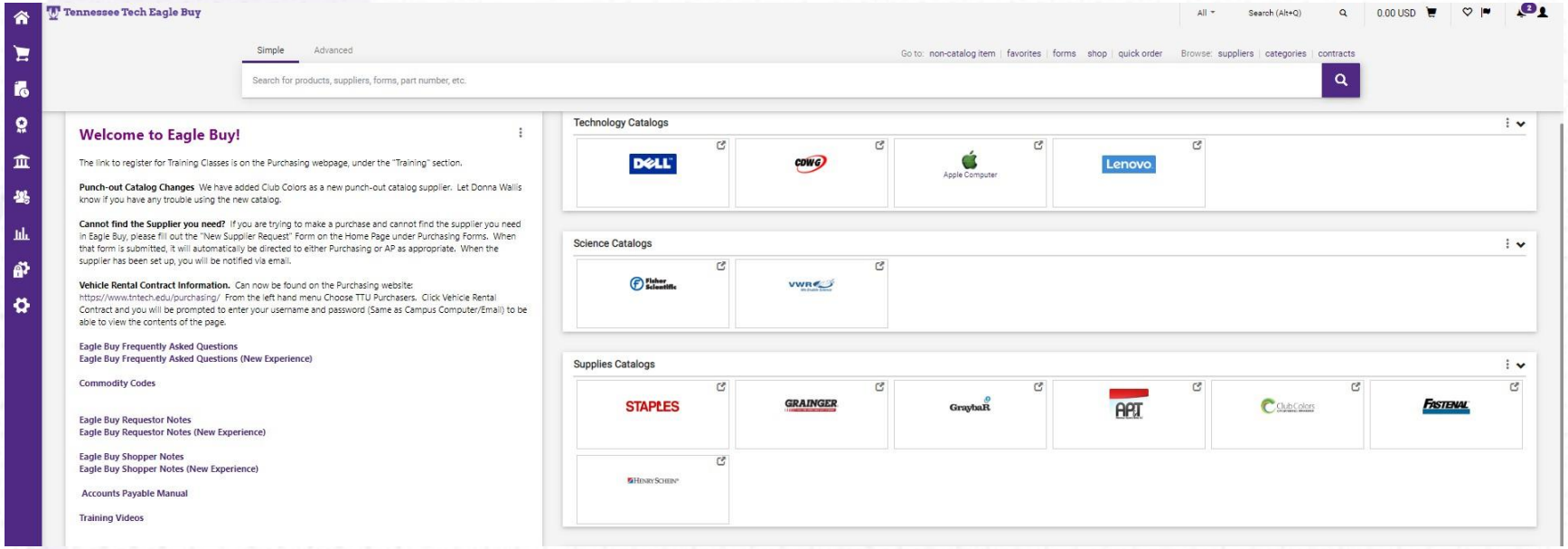
Document Search

3. By clicking the gear icon you can select and arrange the column headings.





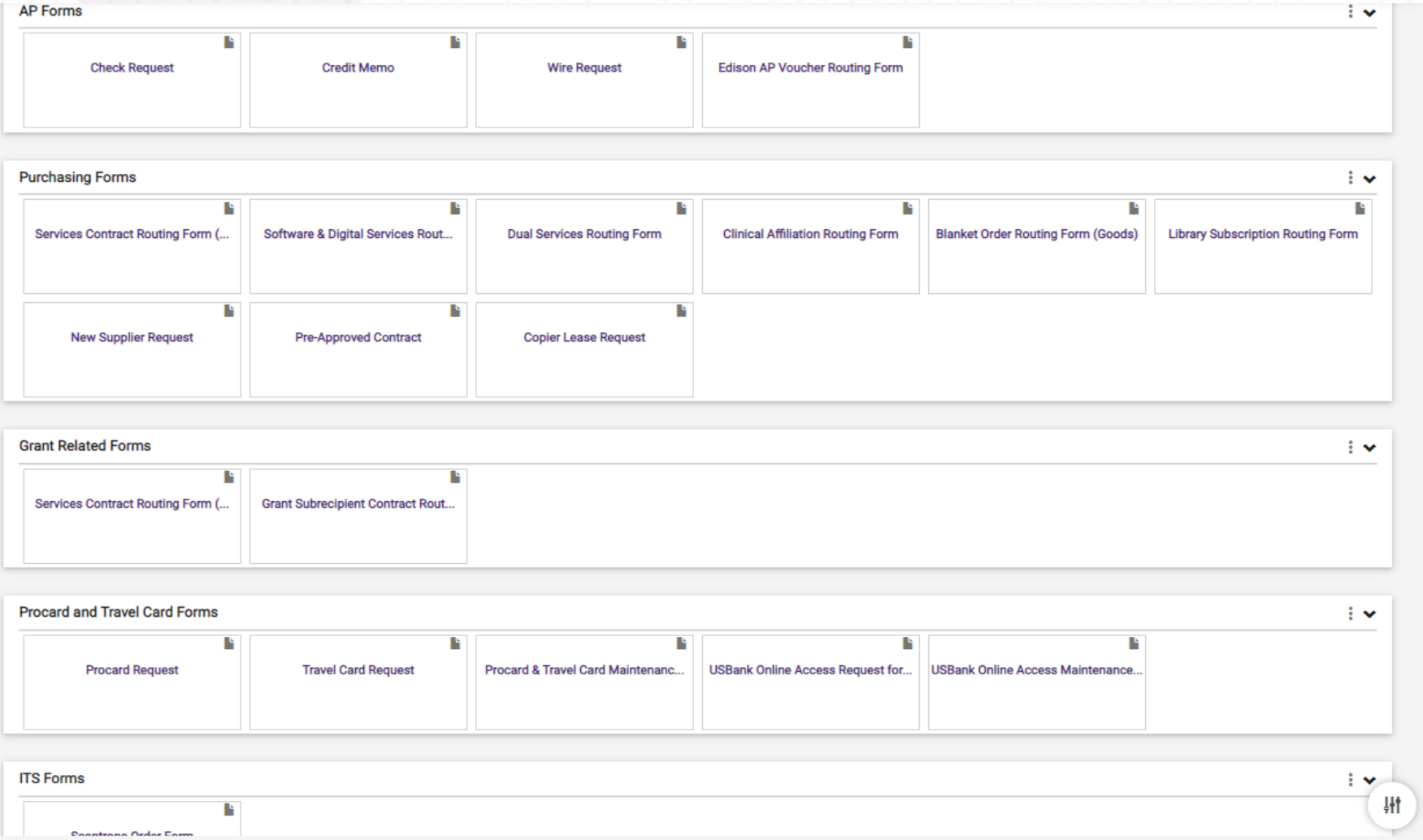
Punch-Out Catalogs



Punch-out Catalogs = Click on the supplier icon that you would like to purchase from, and you will shop at their website by putting items into a cart. Once you are finished shopping you will return to Eagle Buy to finish the online requisition and submit the order.

Punch-out catalogs contain Contract pricing that has already been negotiated.

Eagle Buy Forms



The Form Agreements that need to be filled out and attached to the appropriate Purchasing Forms can be found at the following link: https://www.tntech.edu/purchasing/forms.php

Eagle Buy Forms

- To submit a form, click on the specific Form icon from the Home Page. Fill in all required (bold) information, and when you are done, choose “Add and go to Cart” from the dropdown list. Then Click “Go”.

- The Form will now be added to a cart. Follow the same steps for submitting the cart as you did for commodity items.

- The cart will automatically follow the workflow for approvals, and it will end up in the appropriate department for processing.

- If you need to make changes to the Form after you have added it to your cart you need to click on the Form to open it. Make your changes & choose “Save” from the dropdown list and click “Go”.

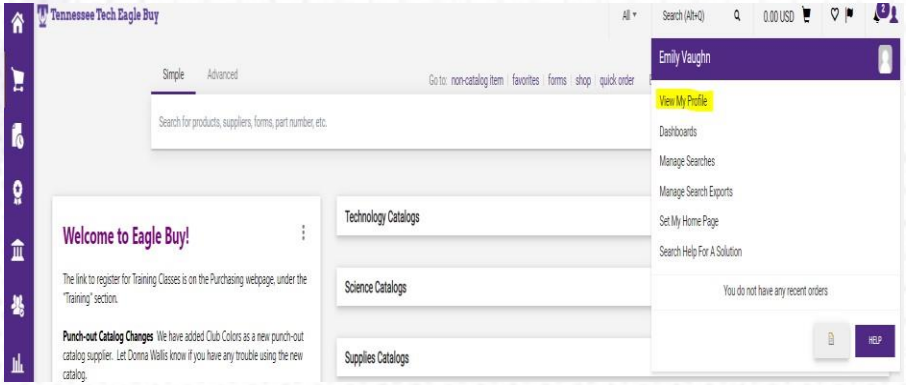
- Forms and commodities cannot be put into the same cart. You will receive a “Do not mix error”. You will then need to process the item that is in your cart first.

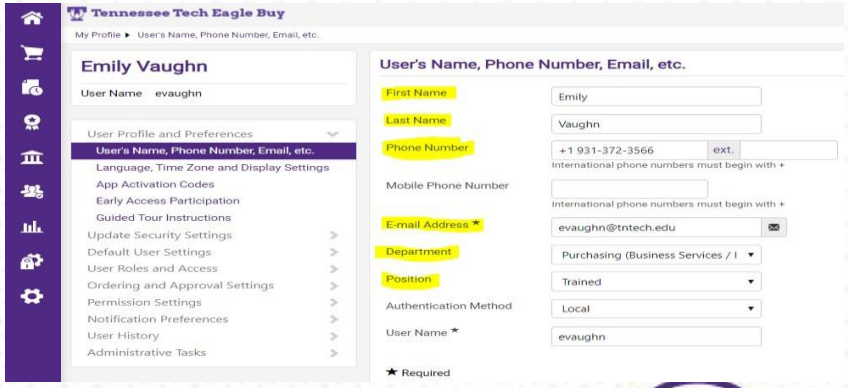
- No Special Characters can be used in the Form(Decimal point is acceptable).

View and Update the User Profile

The goal of this exercise is to update the information in the **User Profile.**

1. Login to the system from the Purchasing Training Webpage(If you are needing to work in Production then you will need to Log into Tech Express and access Eagle Buy from the Quick Links):
    - Go to the TTU Purchasing Training Website: https://www.tntech.edu/purchasing/training.php Scroll to the bottom of the page and click on “Eagle Buy Test Login”
2. Navigate to **the profile screen –** use the dropdown arrow next to your name.
3. From the **User Information and Settings, User’s Name** sub-menu modify any of the available information. **First Name, Last Name, Phone Number, Department.**
4. Change the **Position** Field from “Not Trained” to “Trained.”
5. Click the **Save** button to save any changes made.
6. Navigate to **Language … Settings** and make selections from each dropdown menu.
7. Click **Save** when done.

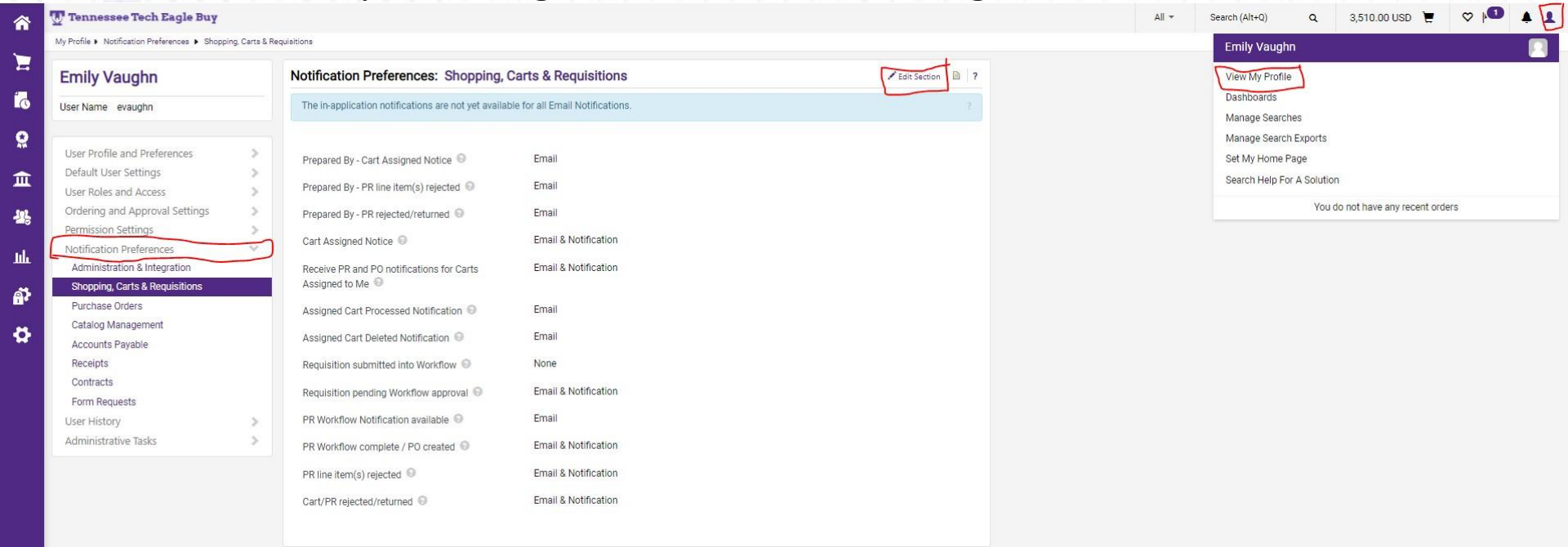




Please make sure you pick the appropriate Department. This will allow you and others in your department to be able to view the documents you create in Eagle Buy.

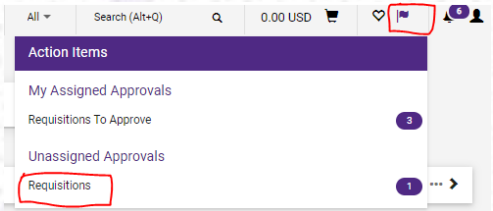
Email Notifications from Eagle Buy

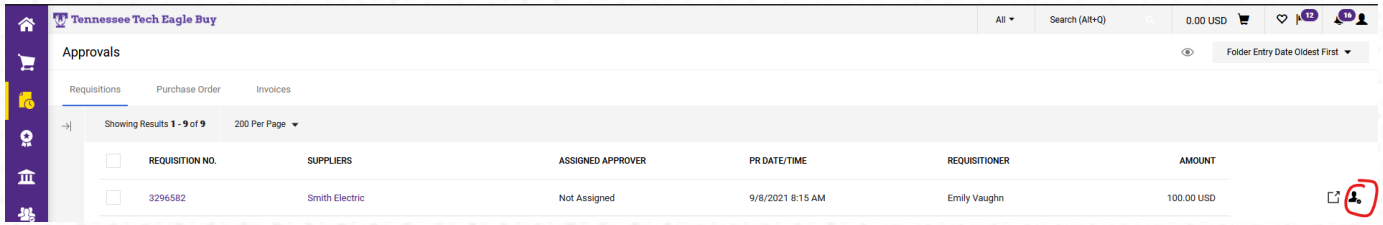
1. All approvers should receive an email notification when a Requisition is submitted for approval.
2. Also, all Approvers will receive an email notification every two weeks until a Requisition is approved, rejected, or returned.
3. Email notifications from Eagle Buy will be from eaglebuy@tntech.edu
4. Email notifications can be modified at any time by selecting Notification Preferences in your Profile. To do so, click on the appropriate category, click “Edit Section,” make your change, then click “Save Changes.”

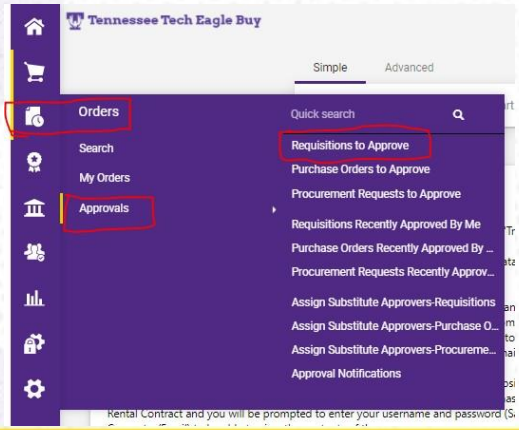


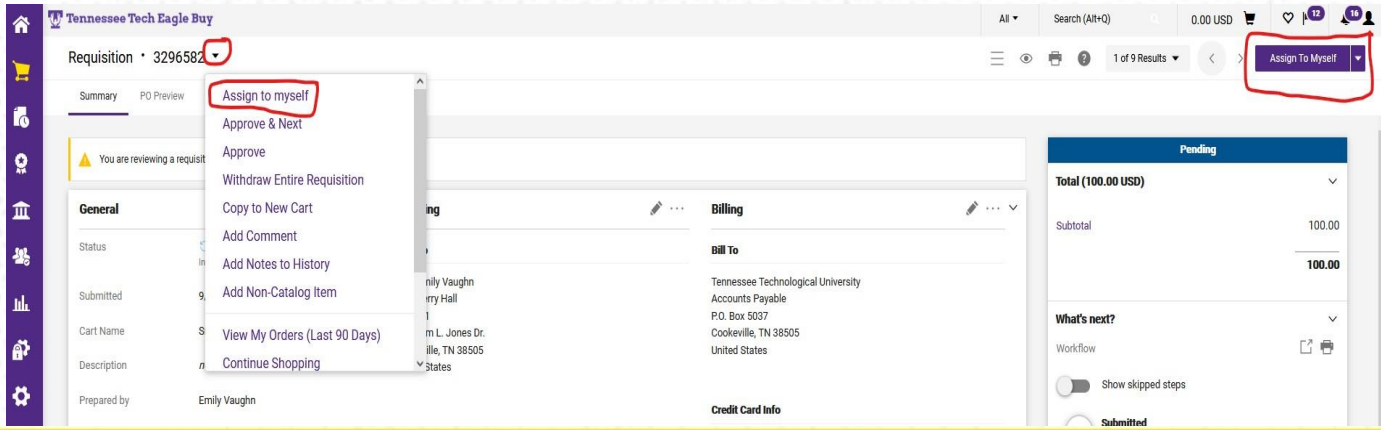
Selecting and Assigning a Requisition

1. Log into Eagle Buy and navigate to the Orders Icon. Under Approvals, select Requisitions to Approve.
   - Or Click on Action Items (Flag Icon at the top of the screen next to your name. There will be a folder for each index, organization, or fund that has been designated for your approval and contains a requisition that needs your approval.
2. Under Unassigned Approvals click on the word “Requisitions.”
3. This will give you a list of the requisitions that need your approval. To the right of each requisition, click the icon. Or, click on the Requisition No. to open each requisition one at a time. Under the dropdown beside the word “requisition.,” choose “Assign to Myself.”





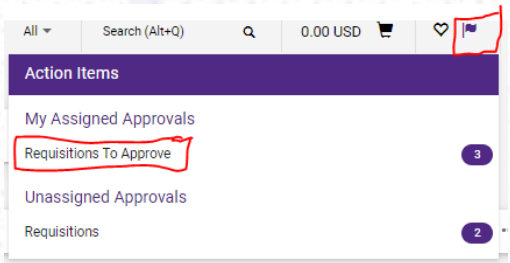


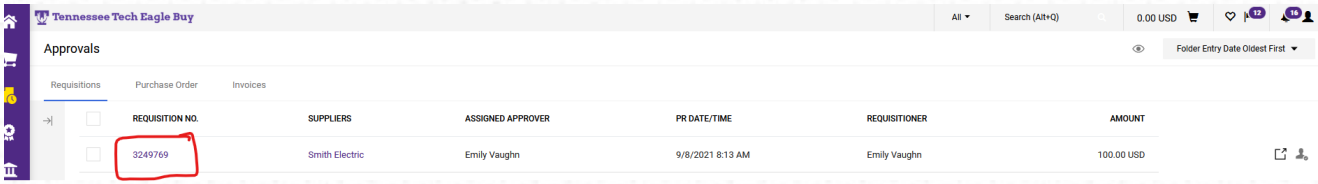


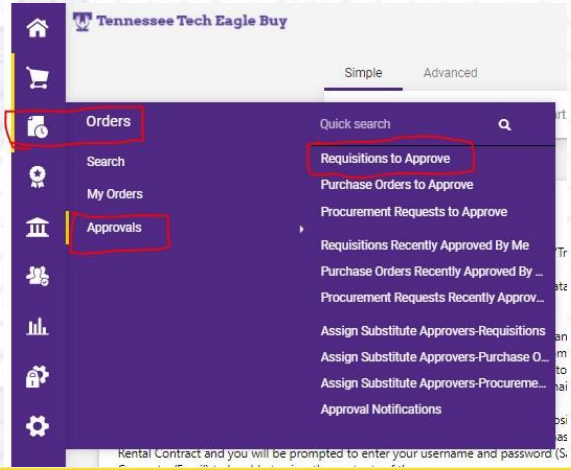
Approving a Requisition

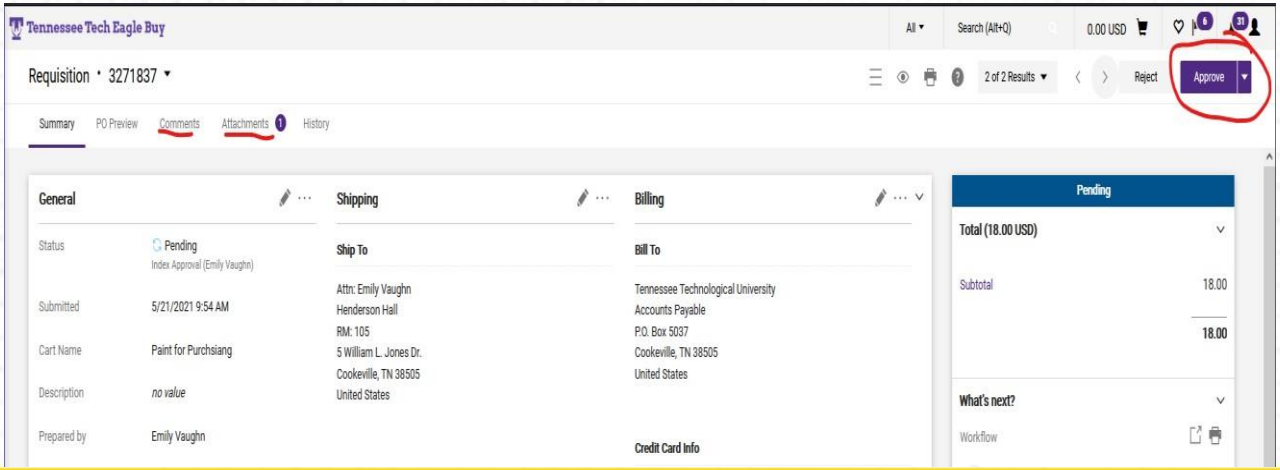
1. Go to Orders, Approvals, Select Requisitions to Approve.
   - Or click on Action Items (Flag Icon) at the top of the screen next to your name. There will be a folder for each Index, Organization, or Fund that has been designated for your approval and contains a requisition that needs your approval.

2. This will give a list of the requisitions that are waiting for approval. Click on the Requisition No. to open each requisition. After reviewing it, (including attachments and comments), click “Approve” in the top right hand corner.



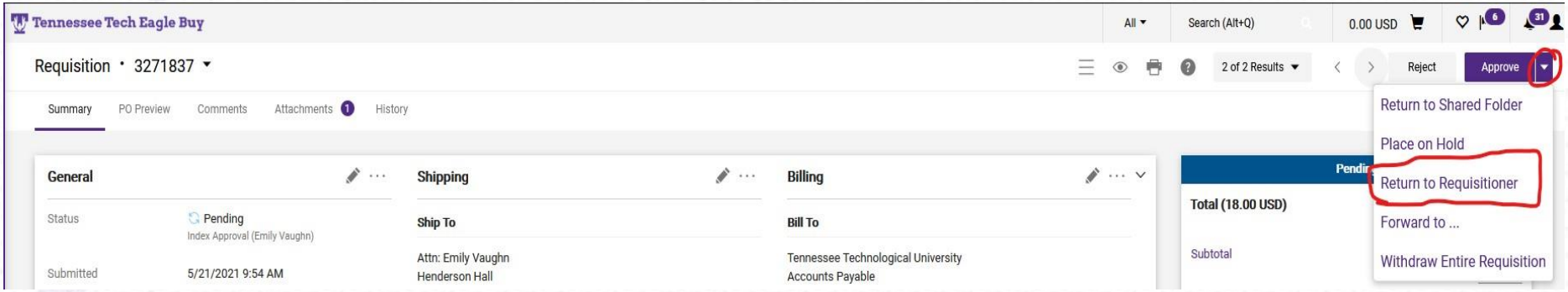


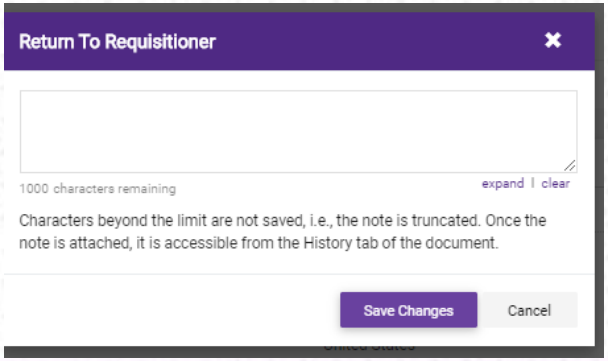




Returning a Requisition

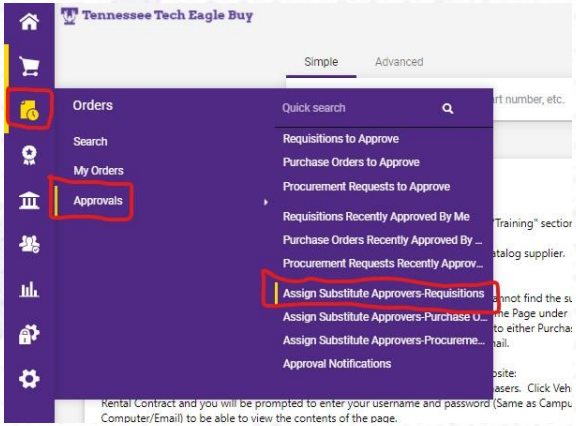
1. It is recommended that requisitions that need to be corrected be returned to the requestor rather than rejected. A rejected requisition cannot be retrieved by the requestor to make corrections. A returned requisition can be corrected and resubmitted.
2. Click the Requisition Number to open the Requisition.
3. From the drop-down beside the word “Approve,” select Return to Requisitioner.
4. Enter the reason for the return and click Save Changes. This note will be available via the Comments and History tab and will be sent in the email to the Requisitioner.

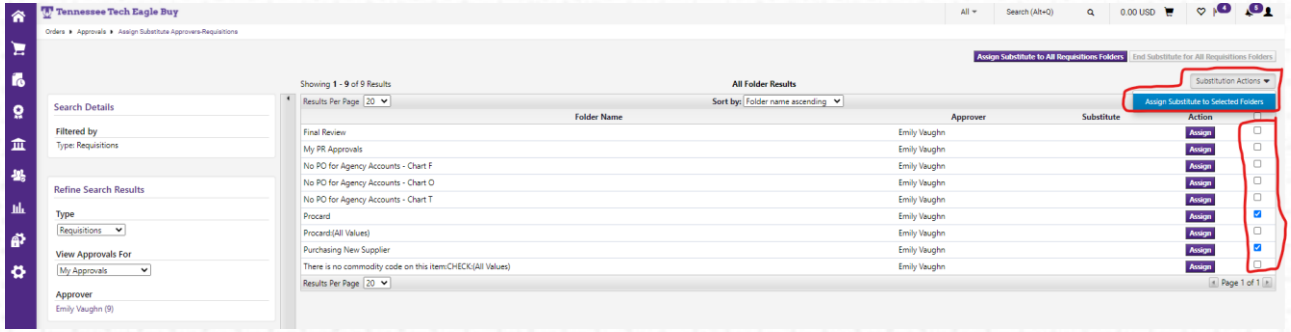


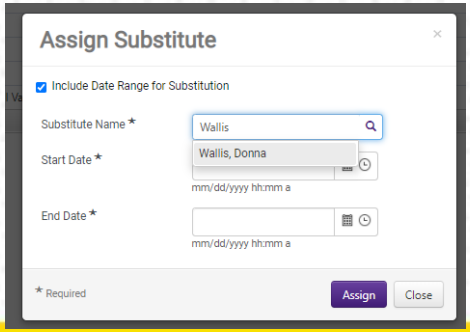


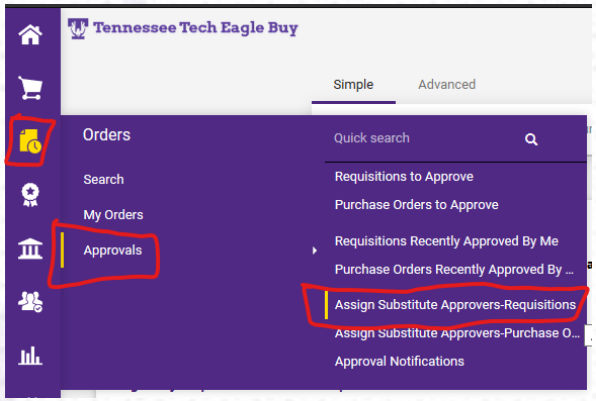
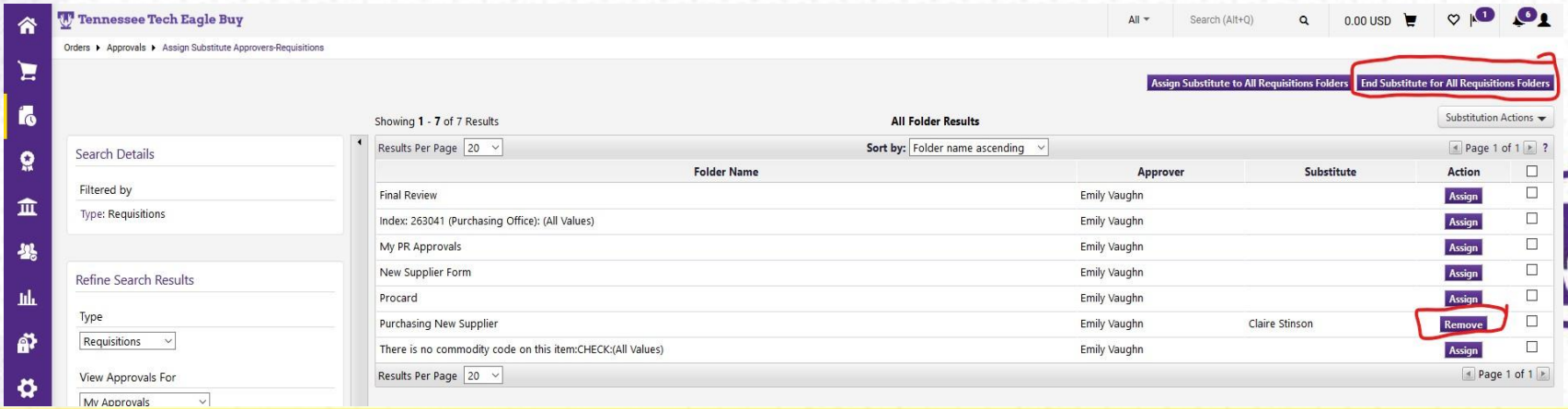
Assigning a Substitute Approver

1. Navigate to the **Orders** (paper and clock) icon. Under **Approvals** select **Assign Substitute Approvers-Requisitions**.
2. Click the checkbox for the folder(s) that you wish to assign to a substitute. At the top of the page, click the **Substitution Actions** dropdown and select **Assign Substitute to Selected Folders**. (Another option is to click the **Assign** button for each folder, or if all folders are to be assigned to one person, then click the **Assign Substitute to All Requisition Folders** at the top of the screen.)
3. Enter the last name of the substitute and click **Search**.
4. Select the appropriate user by clicking on the person's name.
5. Click the check box for Include **Date Range for Substitution** to select a date and time to start and end the substitution automatically.







Removing a Substitution

1. To remove a substitute, return to the Assign Substitute Approvers screen.
2. Click the checkbox for the folder(s) that you wish to remove a substitute.
3. At the top of the page, click the Substitution Actions dropdown and select Remove Substitute From Selected Folders.
4. Other options are to click the Remove button for each folder, or if all folders should have the substitute removed, then click the End Substitute for All Requisition Folders at the top of the screen.