



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:

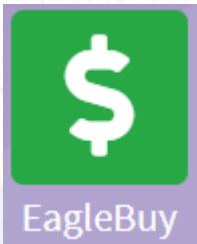
1. Go to the TTU Purchasing Training Website: <https://www.tntech.edu/purchasing/training.php>
2. Scroll to the bottom of the page and click on “Eagle Buy Test Login”

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

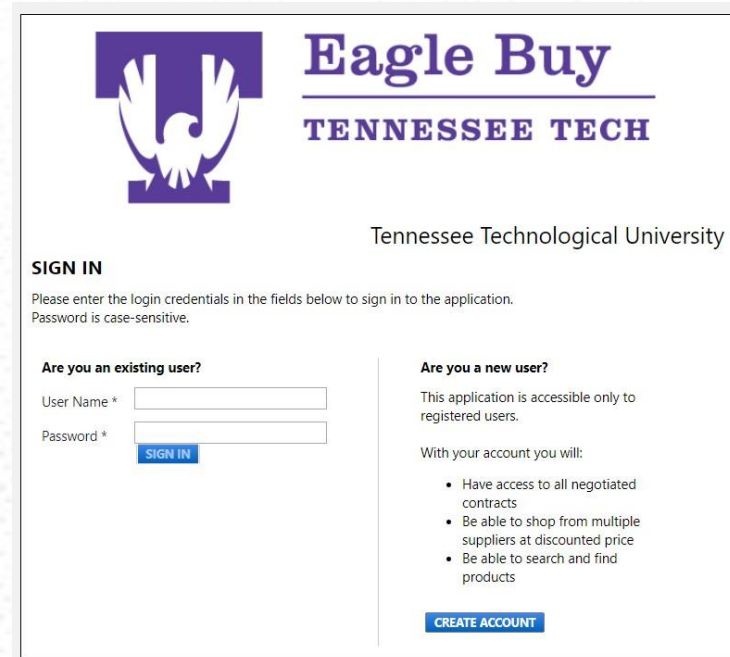
Password is the same as your system password.

Eagle Buy LIVE:

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



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



Eagle Buy
TENNESSEE TECH

Tennessee Technological University

SIGN IN

Please enter the login credentials in the fields below to sign in to the application.
Password is case-sensitive.

Are you an existing user?

User Name *

Password *

SIGN IN

Are you a new user?

This application is accessible only to registered users.

With your account you will:

- Have access to all negotiated contracts
- Be able to shop from multiple suppliers at discounted price
- Be able to search and find products

CREATE ACCOUNT

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



Home Page - Navigation and Help

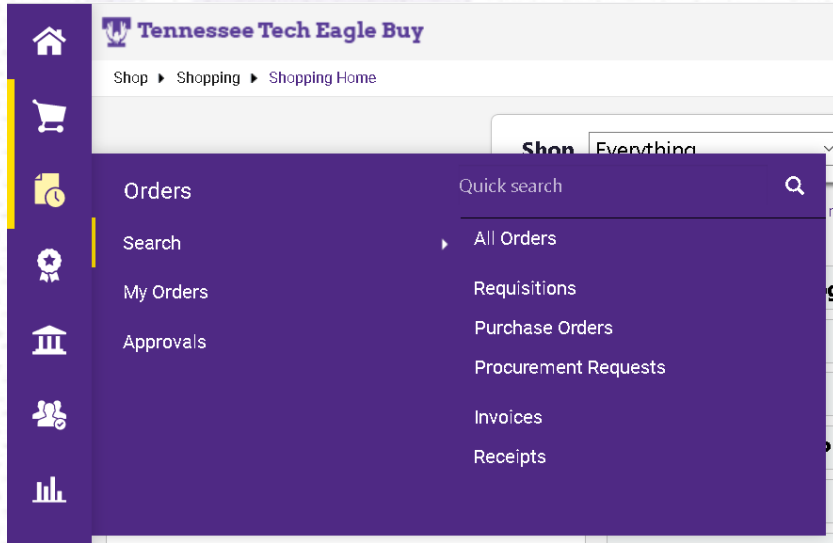
- The Home Page is the place to start if you want to use a punch-out catalog. The catalogs are divided up into different categories. Tech has contracts in place with these featured companies, so purchases can be made without concern about competitive bidding.
- For purchases other than the catalog suppliers, 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.

The screenshot shows the Tennessee Tech Eagle Buy website. At the top, there is a navigation bar with 'Simple' and 'Advanced' options, a search bar, and a list of catalog categories including Technology, Science, and Supplies. A 'Welcome to Eagle Buy!' message box is prominently displayed on the left side, containing various links and information. The message box includes links for 'Punch-out Catalog Changes', 'Cannot find the Supplier you need?', 'Vehicle Rental Contract Information', 'Eagle Buy Frequently Asked Questions', 'Commodity Codes', 'Eagle Buy Requestor Notes', 'Eagle Buy Shopper Notes', 'Accounts Payable Manual', and 'Training Videos'. The bottom of the page features 'My Resources' with contact information for eaglebuy@tntech.edu and a phone number, along with a 'Site Map' link. The Tennessee Tech logo is visible in the bottom right corner.

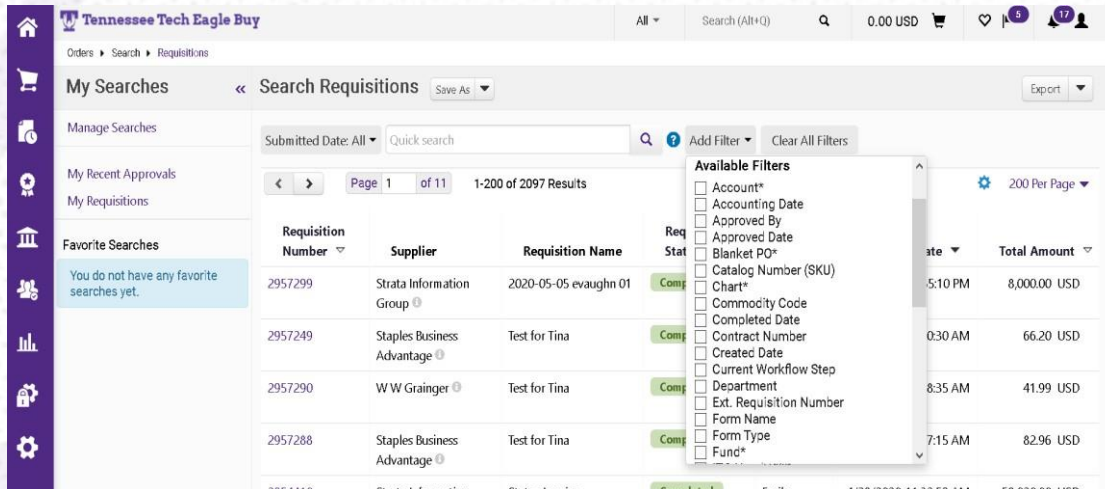


Document Search

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.

Tennessee Tech Eagle Buy

Orders > Search > Purchase Orders

My Searches Search Purchase Orders Save As Export

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

Page 1 of 16 1-200 of 3158 Results 200 Per Page

PO Number	Supplier	Created Date/Time	PO Status	PO Distribution	Requisition Number	Requisition Name	Prepared For	Total Amount	Matching Status	AP Status	Invoice Status	Invoice Number	Receipt Status	Receipt Number
P0091989	Momentous Campus Media	5/18/2020 11:40:09 AM	Completed	DO NOT SEND THE PO TO THE SUPPLIER	131917518	2020-05-08 Irussell 04	Lisa Russell	916.00 USD	Fully Matched	Soft Closed - Waiting for Invoice Pay Status	Fully Invoiced	EB080751	No Receipts	-


Configure Column Display

Reflects the columns defined for the current search. Customizations will apply to the lifetime of the current search unless the search is saved. Columns marked with an * are custom defined data elements

Type to Filter Available Columns... Pin Columns as my defaults

<input type="checkbox"/> Account *	<input type="checkbox"/> PO Number
<input type="checkbox"/> Accounting Date	<input type="checkbox"/> Supplier
<input type="checkbox"/> Accounting Field 1 *	<input type="checkbox"/> Created Date/Time
<input type="checkbox"/> Activity *	<input type="checkbox"/> PO Status
<input checked="" type="checkbox"/> AP Status	<input type="checkbox"/> PO Distribution *
<input type="checkbox"/> Approval Actions	<input type="checkbox"/> Requisition Number
<input type="checkbox"/> Approval Steps	<input type="checkbox"/> Requisition Name
<input type="checkbox"/> Blanket PO *	<input type="checkbox"/> Prepared For
<input type="checkbox"/> Change Request No.	<input type="checkbox"/> Total Amount
<input type="checkbox"/> Chart *	<input type="checkbox"/> Matching Status
<input type="checkbox"/> Completed Date	<input type="checkbox"/> AP Status
<input checked="" type="checkbox"/> Created Date/Time	<input type="checkbox"/> Invoice Status

Apply Cancel



Punch-Out Catalogs

The screenshot displays the Tennessee Tech Eagle Buy website interface. At the top, there is a navigation bar with the site name, currency (0.00 USD), and search options. Below this is a search bar with the text "Search for products, suppliers, forms, part number, etc." and a search icon. The main content area is divided into three sections: Technology Catalogs, Science Catalogs, and Supplies Catalogs. Each section contains a grid of supplier logos with a checkmark icon in the top right corner of each tile. The Technology Catalogs section includes Dell, CDWG, Apple Computer, and Lenovo. The Science Catalogs section includes Fisher Scientific and VWR. The Supplies Catalogs section includes Staples, Grainger, GryphaR, ART, Club Colors, and Fastenal. On the left side of the page, there is a vertical navigation menu with icons for home, shopping cart, account, and other functions. Below the menu, there is a "Welcome to Eagle Buy!" section with a link to register for Training Classes. This is followed by a "Punch-out Catalog Changes" section, a "Cannot find the Supplier you need?" section, a "Vehicle Rental Contract Information" section, and several "Frequently Asked Questions" sections.

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

AP Forms

Check Request	Credit Memo	Wire Request	Edison AP Voucher Routing Form
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Purchasing Forms

Services Contract Routing Form (...)	Software & Digital Services Rout...	Dual Services Routing Form	Clinical Affiliation Routing Form	Blanket Order Routing Form (Goods)	Library Subscription Routing Form
New Supplier Request	Pre-Approved Contract	Copier Lease Request			

Grant Related Forms

Services Contract Routing Form (...)	Grant Subrecipient Contract Rout...
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Procard and Travel Card Forms

Procard Request	Travel Card Request	Procard & Travel Card Maintenanc...	USBank Online Access Request for...	USBank Online Access Maintenance...
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ITS Forms

Blanket Order Form

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

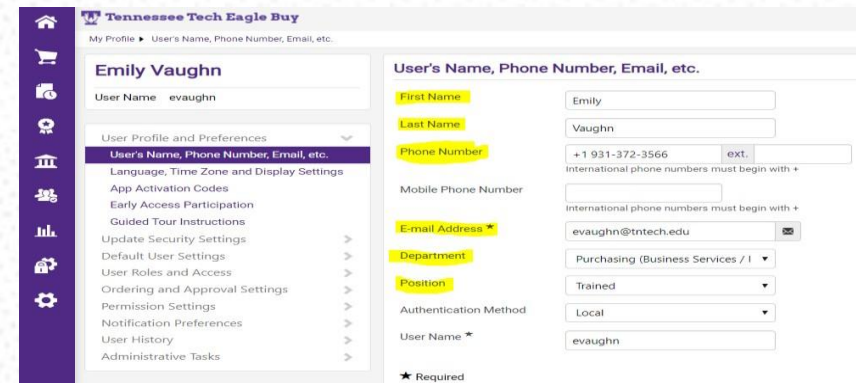
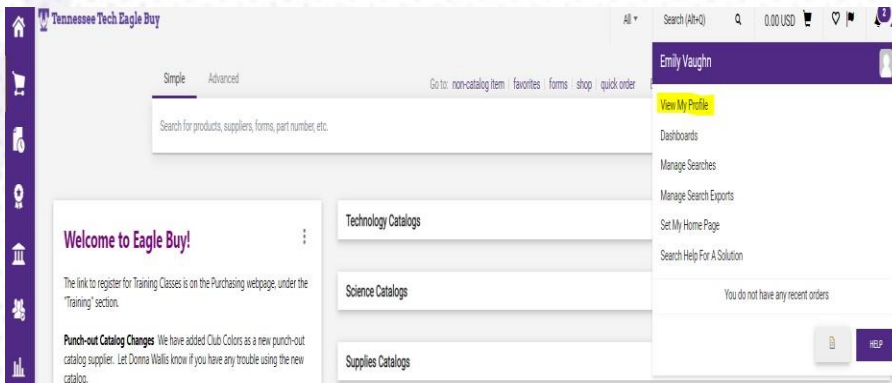
- To submit a form, click on the specific Form icon from the Home Page. Fill in all required (bold) information, and when you are done, choose “Add and go to Cart” from the dropdown list. Then Click “Go”.
- The Form will now be added to a cart. Follow the same steps for submitting the cart as you did 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

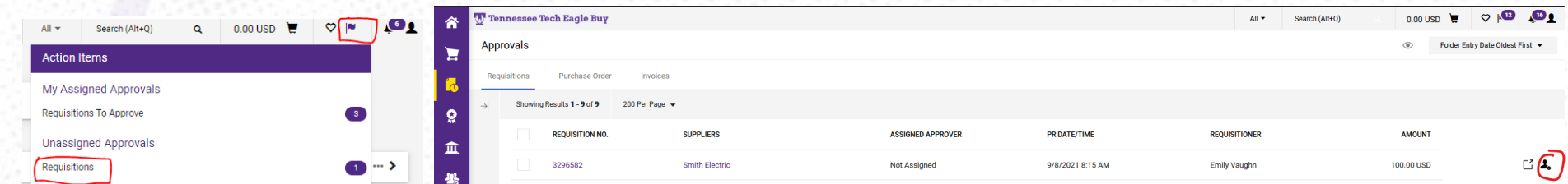
1. All approvers should receive an email notification when a Requisition is submitted for approval.
2. Also, all Approvers will receive an email notification every two weeks until a Requisition is approved, rejected, or returned.
3. Email notifications from Eagle Buy will be from eaglebuy@tntech.edu
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.”

The screenshot displays the user profile page for Emily Vaughn. The left sidebar contains a navigation menu with 'Notification Preferences' highlighted. The main content area is titled 'Notification Preferences: Shopping, Carts & Requisitions' and features an 'Edit Section' button. A table lists various notification categories and their corresponding delivery methods. The right sidebar shows the user's name and a 'View My Profile' button.

Notification Category	Delivery Method
Prepared By - Cart Assigned Notice	Email
Prepared By - PR line item(s) rejected	Email
Prepared By - PR rejected/returned	Email
Cart Assigned Notice	Email & Notification
Receive PR and PO notifications for Carts Assigned to Me	Email & Notification
Assigned Cart Processed Notification	Email
Assigned Cart Deleted Notification	Email
Requisition submitted into Workflow	None
Requisition pending Workflow approval	Email & Notification
PR Workflow Notification available	Email
PR Workflow complete / PO created	Email & Notification
PR line item(s) rejected	Email & Notification
Cart/PR rejected/returned	Email & Notification

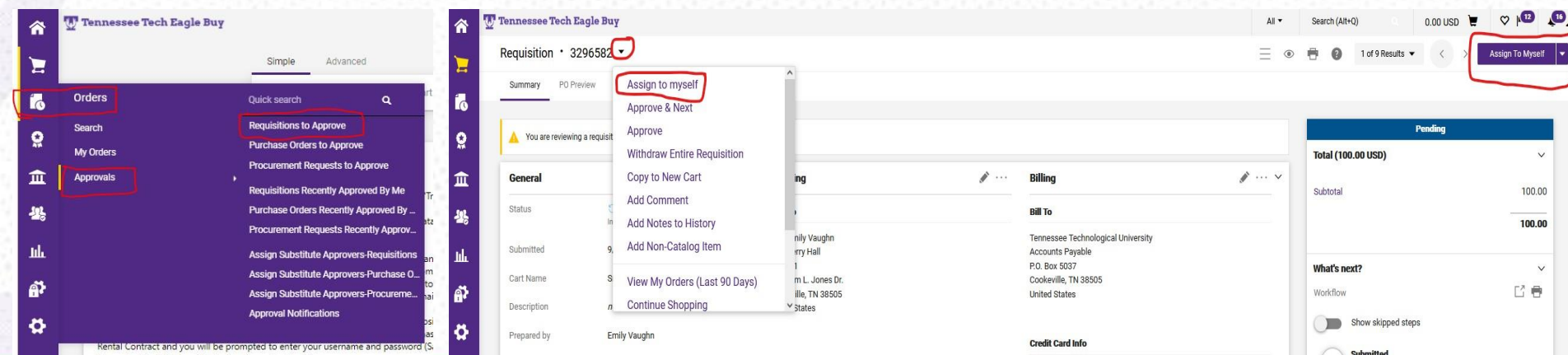
Selecting and Assigning a Requisition

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.”



The screenshot shows the Eagle Buy interface. On the left, the 'Action Items' menu is open, with 'Requisitions' highlighted. The main area displays the 'Approvals' page, showing a table of requisitions. The table has columns for Requisition No., Suppliers, Assigned Approver, PR Date/Time, Requisitioner, and Amount. One requisition is listed: 3296582, Smith Electric, Not Assigned, 9/8/2021 8:15 AM, Emily Vaughn, 100.00 USD. A person icon is visible in the top right corner of the table.

REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUISITIONER	AMOUNT
3296582	Smith Electric	Not Assigned	9/8/2021 8:15 AM	Emily Vaughn	100.00 USD



The screenshot shows the Eagle Buy interface. On the left, the 'Orders' menu is open, with 'Approvals' highlighted. The main area displays the 'Requisition' details page for requisition 3296582. The 'Assign to Myself' dropdown menu is open, showing options: Assign to myself, Approve & Next, Approve, Withdraw Entire Requisition, Copy to New Cart, Add Comment, Add Notes to History, Add Non-Catalog Item, View My Orders (Last 90 Days), and Continue Shopping. The 'Assign to Myself' option is highlighted. The page also shows a 'Pending' summary with a total of 100.00 USD and a 'What's next?' section.

REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUISITIONER	AMOUNT
3296582	Smith Electric	Not Assigned	9/8/2021 8:15 AM	Emily Vaughn	100.00 USD

Pending

Total (100.00 USD)

Subtotal 100.00

100.00

What's next?

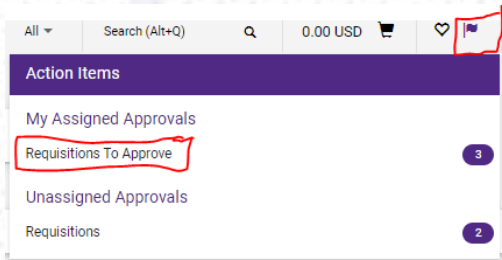
Workflow

Show skipped steps

Submitted

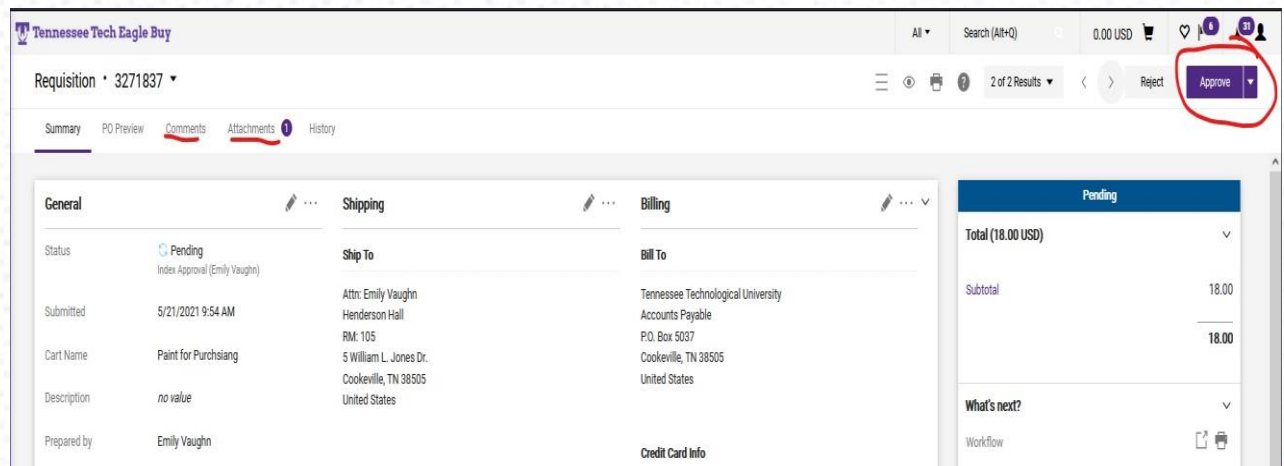
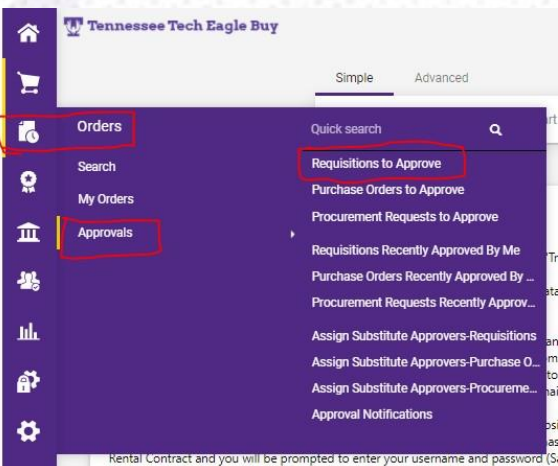
Approving a Requisition

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.



The screenshot shows the 'Approvals' page with a table of requisitions. The first row is highlighted, and the 'REQUISITION NO.' '3249769' is highlighted with a red box.

REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUISITIONER	AMOUNT
3249769	Smith Electric	Emily Vaughn	9/8/2021 8:13 AM	Emily Vaughn	100.00 USD



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.

Tennessee Tech Eagle Buy

Requisition • 3271837

Summary PO Preview Comments Attachments 1 History

General

Status Pending
Index Approval (Emily Vaughn)

Submitted 5/21/2021 9:54 AM

Shipping

Ship To
Attn: Emily Vaughn
Henderson Hall

Billing

Bill To
Tennessee Technological University
Accounts Payable

Total (18.00 USD)
Subtotal

Approve

- Return to Shared Folder
- Place on Hold
- Return to Requisitioner
- Forward to ...
- Withdraw Entire Requisition

Return To Requisitioner

1000 characters remaining expand | clear

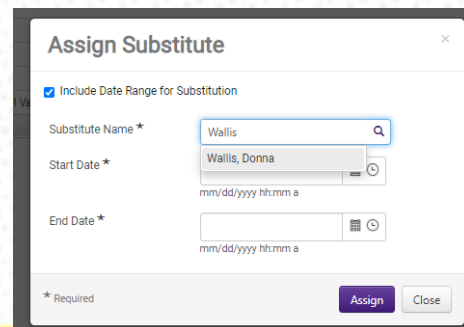
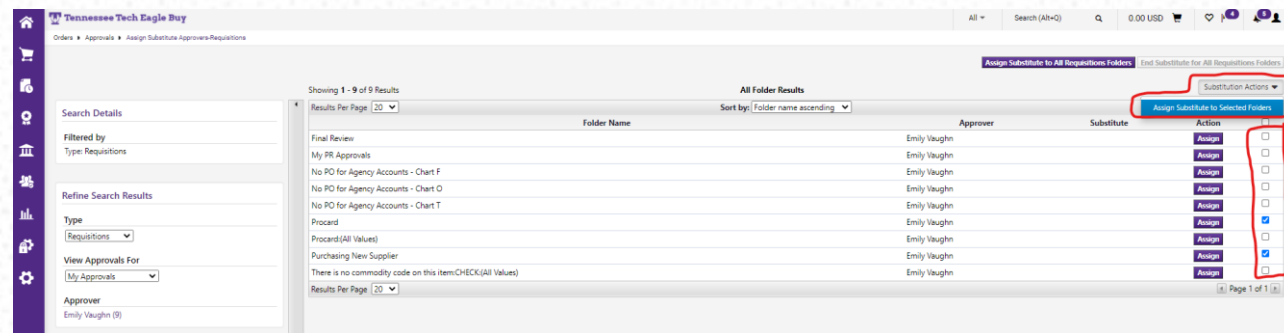
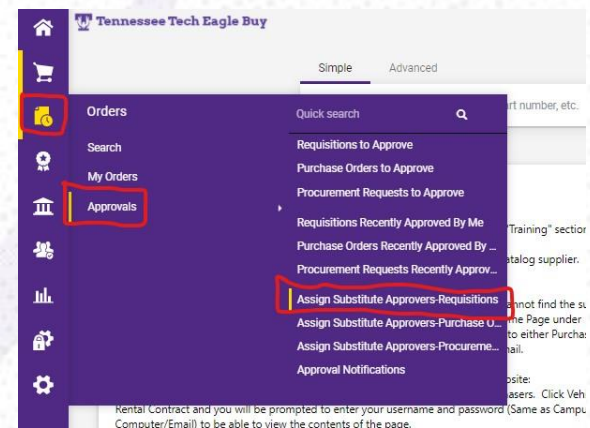
Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

Save Changes Cancel



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.

