



**Tennessee**  
**TECH**



# Eagle Buy

---

TENNESSEE TECH

## Requestors Training Session



# 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 the 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:**

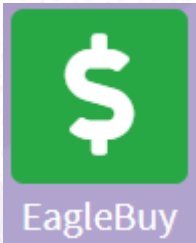
1. Go to the TTU Purchasing Training Website: <https://www.tntech.edu/purchasing/training.php>
2. Scroll to the bottom of the page and click on “Eagle Buy Test Login”

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

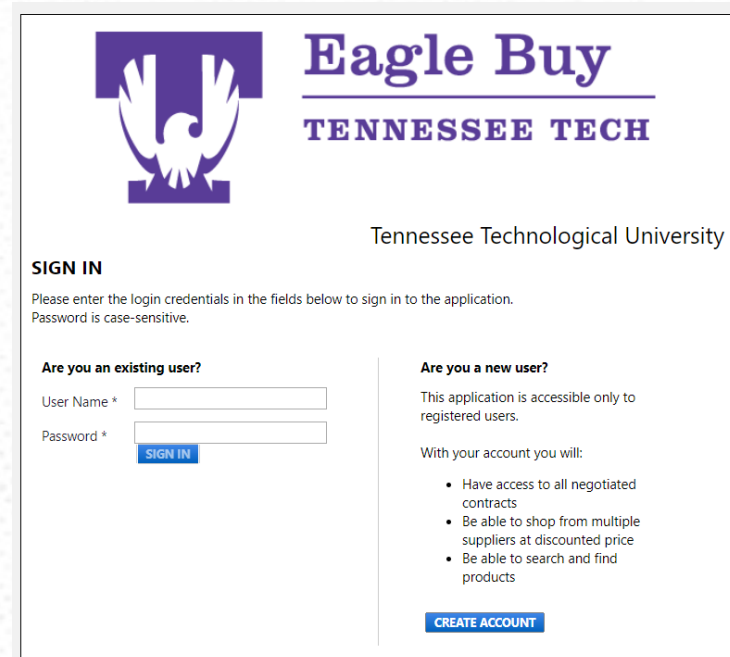
Password is the same as your system password.

### **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

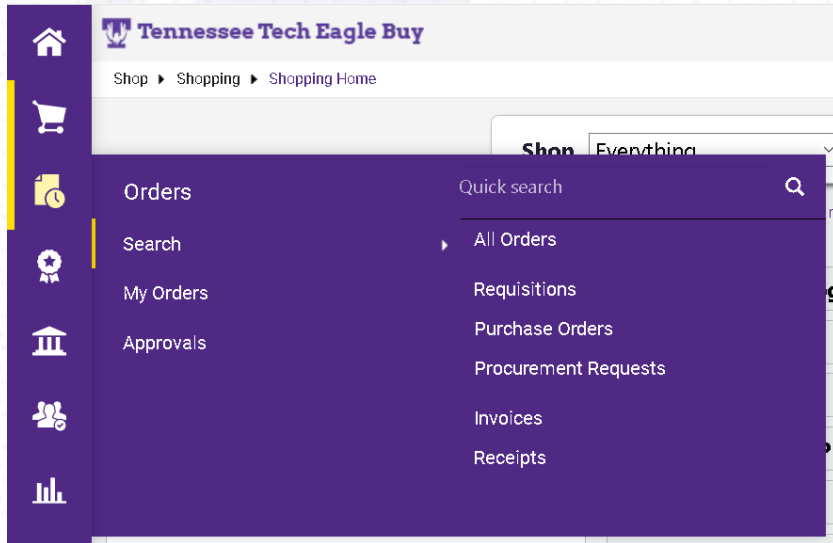
- The Home Page is the place to start if you want to use a punch-out catalog. The catalogs are divided up into different categories. Tech has contracts in place with these featured companies, so purchases can be made without concern about competitive bidding.
- For purchases other than the catalog suppliers, 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 box 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 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 Home Page. At the top, there is a navigation bar with 'Simple' and 'Advanced' options, a search box, and a list of catalog and form categories. 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 'Welcome to Eagle Buy!', '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 right side of the page features a list of catalog and form categories, including Technology Catalogs, Science Catalogs, Supplies Catalogs, AP Forms, Purchasing Forms, Grant Related Forms, Procard and Travel Card Forms, ITS Forms, and Order Forms (Athletics Only). At the bottom, there is a 'My Resources' section with contact information for eaglebuy@tntech.edu and a phone number.

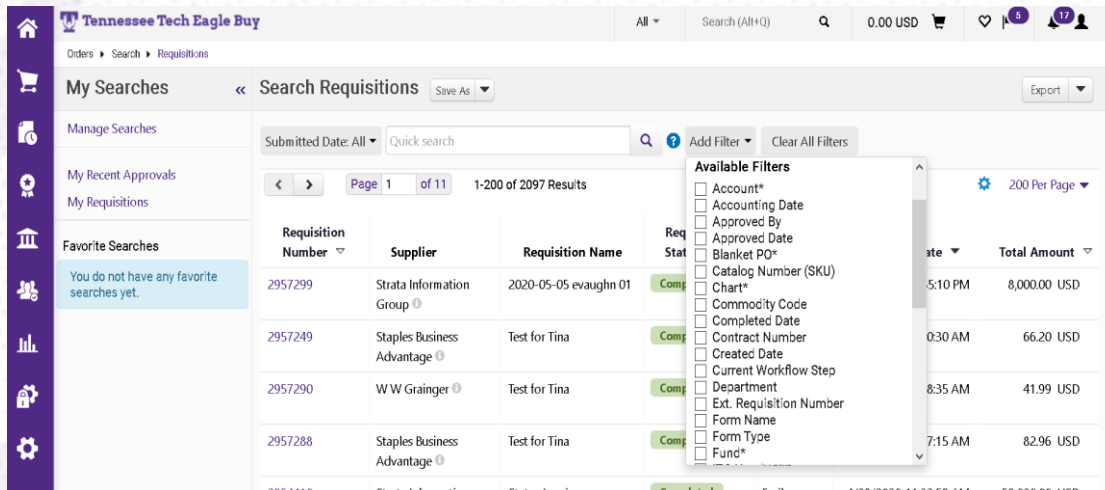


# Document Search

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

Apply Cancel



# Punch-Out Catalogs

The screenshot displays the Tennessee Tech Eagle Buy website interface. On the left is a vertical navigation menu with icons for home, shopping cart, search, settings, and other functions. The main content area is divided into three sections:

- Welcome to Eagle Buy!**: A welcome message with links for training classes, punch-out catalog changes, and frequently asked questions.
- Technology Catalogs**: A grid of supplier logos including Dell, CDWG, Apple Computer, and Lenovo.
- Science Catalogs**: A grid of supplier logos including Fisher Scientific and VWR.
- Supplies Catalogs**: A grid of supplier logos including Staples, Grainger, Gryphon, APT, Club Colors, and Fastenal.

Each supplier logo in the catalog grids has a small icon in the top right corner, likely representing a 'punch-out' or 'add to cart' function.

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
---------------	-------------	--------------	--------------------------------

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...
--------------------------------------	-------------------------------------

Procard and Travel Card Forms

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

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

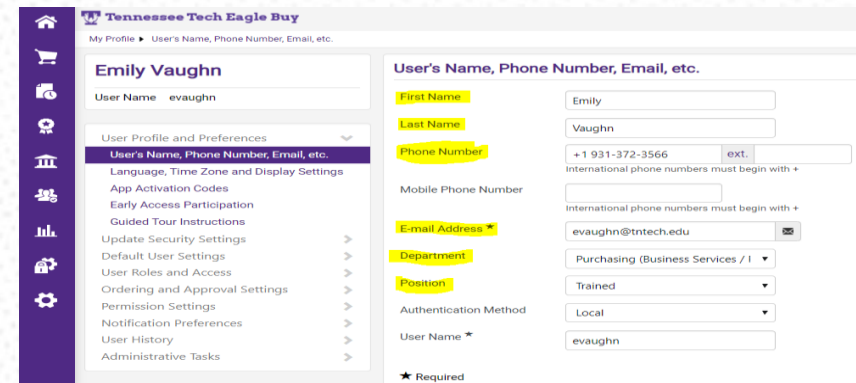
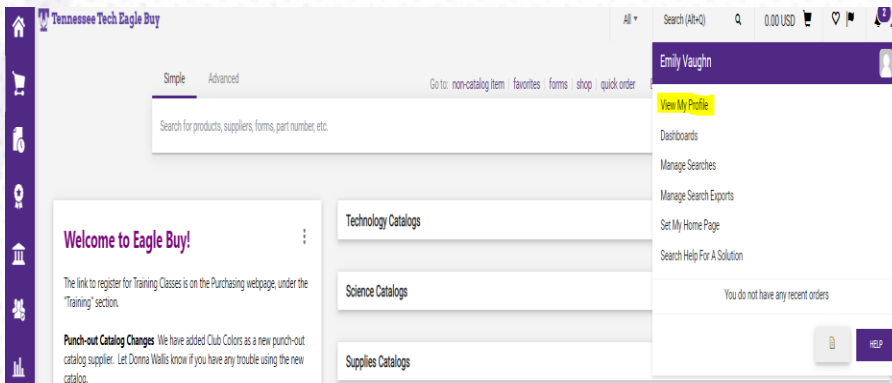
- To submit a form, click on the specific Form icon from the Home Page. Fill in all required (bold) information, and when you are done, choose “Add and go to Cart” from the dropdown list. Then Click “Go”.
- The Form will now be added to a cart. Follow the same steps for submitting the cart as you did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





# Ordering From a Punch-Out

- The goal of this exercise is to demonstrate how to perform a standard (simple) search for an item in Eagle Buy.

1. From the **Home page**, Locate the CDW-G Logo in the Punch out section of the Showcase.

Click on the logo and you will be taken into CDW's website.



2. Locate a product and click **Add to Cart**.
3. Update the quantity if necessary, then click on **Checkout**.
4. Click **Transfer Shopping Cart**. You will now go back into Eagle Buy.
5. You can rename the cart if that is helpful to you.
6. Click **Proceed to Checkout**.
7. Enter all **required information** that you know for this order.

- In the General section you will need to click  to edit this section. Next to edit the PO Distribution you will need to click the  to choose "Send the PO to the Supplier".

PO Distribution


Send the PO to the Su



- Click  to enter ship to address. You will need to search for your Building and select it. Then you will have the option to enter the Attn field and the Room number field. Next click the box next to Add to my address and click the box next to "Make Default" to save it as your default address. Click Save.
- Click  to enter Billing information if using Procard. Click the radio button next to New Credit Card and fill in the information. Edit info then click Save.




## Ordering From a Punch-out Continued

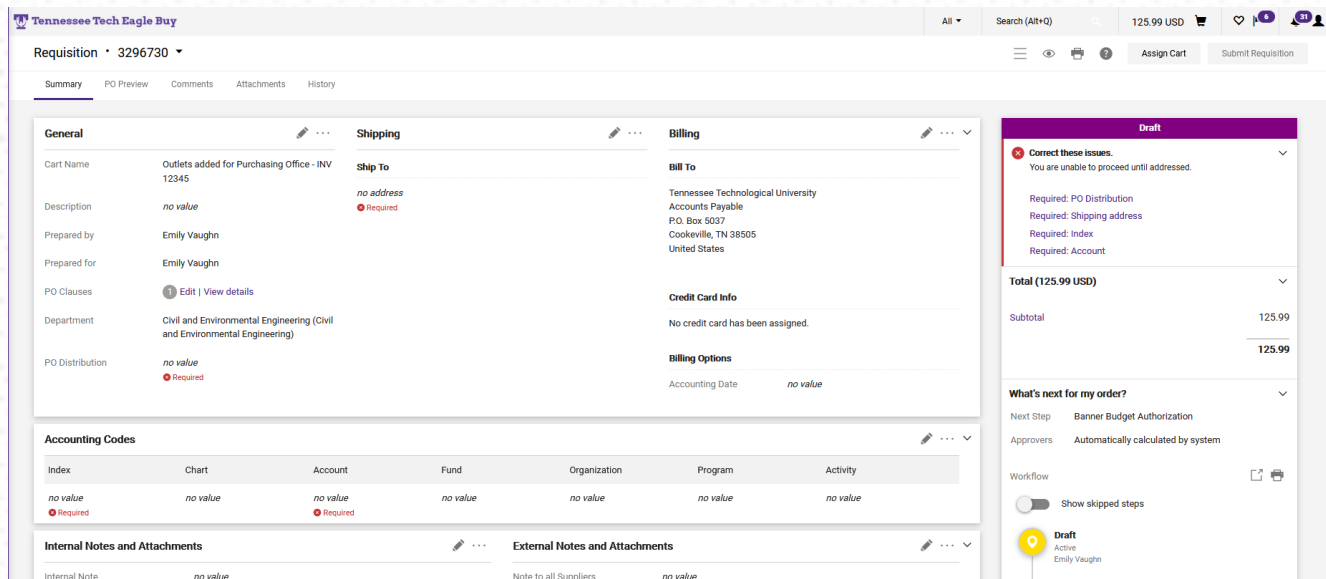
- Click  to edit the Accounting Codes section. When the pop-up box appears you will need to enter the Index and Account Code only. Click the Check Mark in the bottom right hand corner of the pop-up box to save the accounting codes entered.
  - If all of the accounting codes do not populate and or some of them do not have descriptions, then something is wrong. Make sure you did not make an error in entering the accounting codes. If they are correct and something is still wrong, you will need to contact Kacee Abbott for assistance.
  - If you need to add multiple accounting codes, you will click on the + sign in the bottom right hand corner of the pop-up box.
- Click the word “Comments” at the top of the requisition and click the + sign to Add a Comment to give the Approvers additional information.
- Go to the Internal Notes and Attachments Section if you want to attach additional information.
- Go to the External Notes and Attachments Section if the Vendor should receive a copy of a Quote, etc. with the Purchase Order.
- Click "Submit Requisition" after you have reviewed the requisition for correctness and are ready to submit the cart.



# Submitting a Cart for Approval

The goal of this exercise is for a Requestor to complete a cart and submit it for approval.

1. Eagle Buy will notify you when you have a cart(s) that needs to be submitted. A purple box appears with the Flag icon that is **Action Items** on the home page.
2. Click on the link titled **Carts Assigned to me**. Click on the **Shopping Cart Name**, and it will open.
3. Click **Proceed to Checkout**.
4. Fill in all required information – any missing information will show in red as a required field. Or you can check the “Correct these issues” section to the right of the Requisition. You can find and edit each section by clicking  Make sure the Shipping information is correct and if using a Procard, make sure the Billing Information has the Procard information filled in.
5. Always click **Save Changes** after you have updated each section.
6. Click on **Submit Requisition**.



Tennessee Tech Eagle Buy

Requisition 3296730

Summary PO Preview Comments Attachments History

**General**

Cart Name: Outlets added for Purchasing Office - INV 12345

Description: no value

Prepared by: Emily Vaughn

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

Department: Civil and Environmental Engineering (Civil and Environmental Engineering)

PO Distribution: no value

**Shipping**

Ship To: no address (Required)

**Billing**

Bill To: Tennessee Technological University, Accounts Payable, P.O. Box 5037, Cookeville, TN 38505, United States

Credit Card Info: No credit card has been assigned.

Billing Options: Accounting Date: no value

**Accounting Codes**

Index	Chart	Account	Fund	Organization	Program	Activity
no value	no value	no value	no value	no value	no value	no value
Required		Required				

**Internal Notes and Attachments**

Internal Note: no value

**External Notes and Attachments**

Note to all Suppliers: no value

**Draft**

**Correct these issues.** You are unable to proceed until addressed.

- Required: PO Distribution
- Required: Shipping address
- Required: Index
- Required: Account

**Total (125.99 USD)**


Subtotal: 125.99

Total: 125.99

**What's next for my order?**

Next Step: Banner Budget Authorization

Approvers: Automatically calculated by system

Workflow: 

Show skipped steps

**Draft** Issue Emily Vaughn



# Using Simple Search (Shop at the Top)

The goal of this exercise is to demonstrate how to perform a standard (simple) search for an item in a TTU contract.

1. From the **Home** page, enter a **product description** that describes your item in the **shop at the top**

Examples: paint, football, electrical services, etc.

2. Click enter or the Magnifying Glass.


3. Click **Add to Cart** for the item that you want to order.

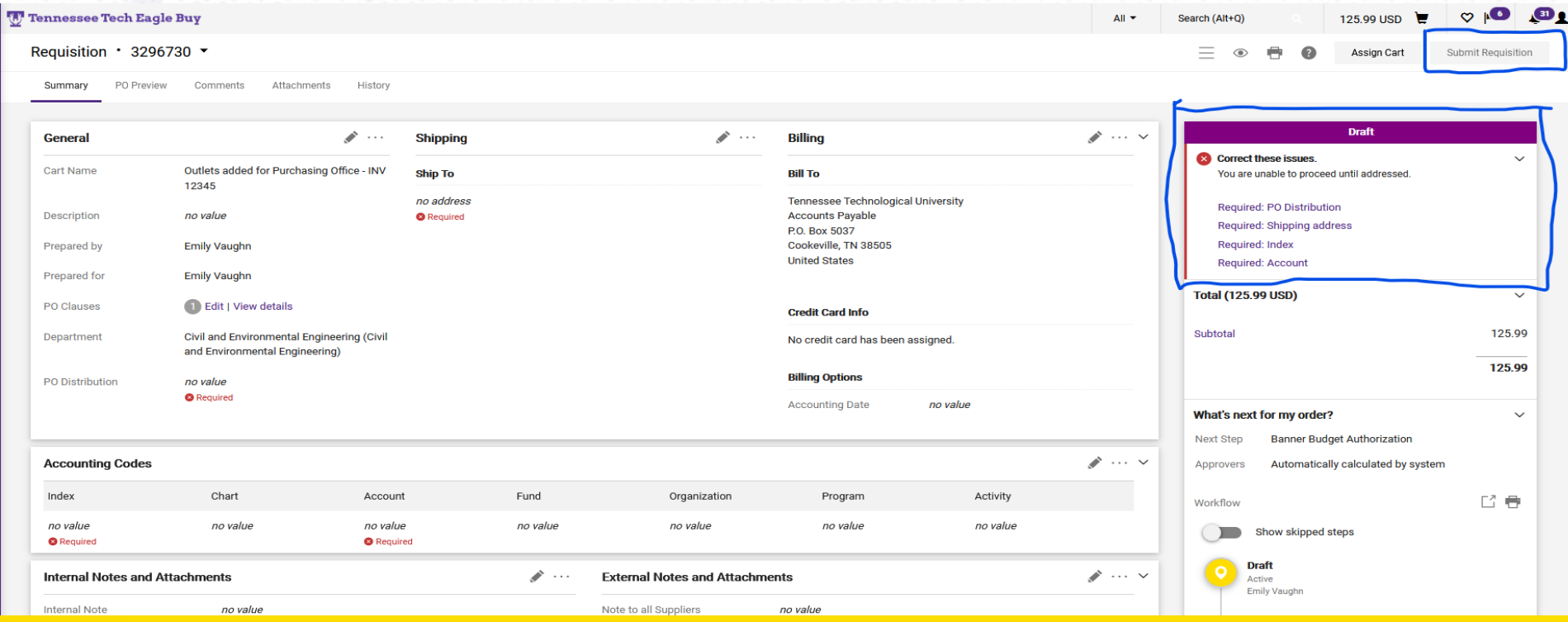
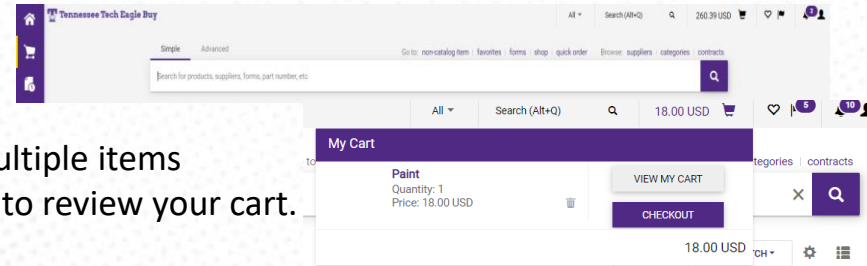
- Perform several searches in order to select multiple items

4. Click on your cart link, in **the upper right-hand corner**, to review your cart.

5. Click **Proceed to Checkout**.

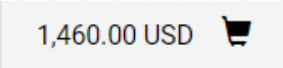

6. Enter all **required information** for this order. You can see the issues you need to correct by clicking the arrow next to **Correct these issues**.

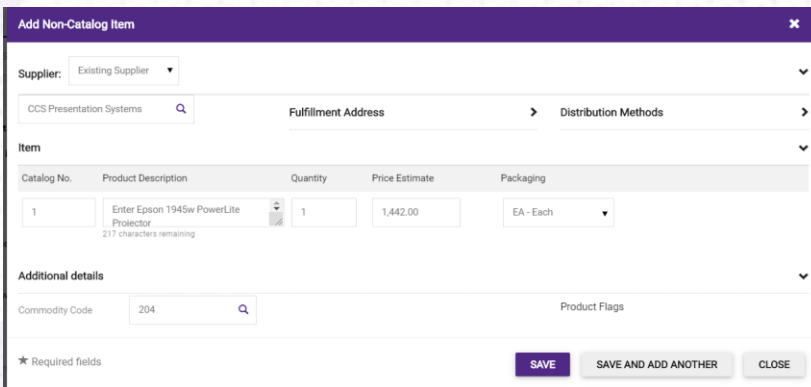
- Click the  to edit each Section.
- Click **Submit Requisition** button when you are done.



# Shopping For Non-Catalog Items

The goal of this exercise is to order an item that is not available in either a hosted catalog or punch out catalog.

1. Click the word non-catalog item [Go to: non-catalog item](#) on the Home/Shop page.
2. Enter a Supplier. Use CCS Presentation Systems or Perform supplier search.
3. Complete all required information (supplier, catalog no., product description, quantity, price estimate, commodity code are required):
  - Enter Epson 1945w PowerLite Projector (price \$1442 each)
4. Click Save.
5. Click on the cart icon  in the upper right-hand corner. Click View My Cart.
6. Update the Shopping Cart Name.
7. Click Proceed to Checkout.
8. Enter all **required information** for this order. You can see the issues you need to correct by clicking the arrow next to **Correct these issues**.
  - Click the  to edit each Section.
9. Click the **Submit Requisition** button when you are done.



Catalog No.	Product Description	Quantity	Price Estimate	Packaging
1	Enter Epson 1945w PowerLite Projector <small>217 characters remaining</small>	1	1,442.00	EA - Each

Additional details

Commodity Code	204	Product Flags
----------------	-----	---------------

★ Required fields

SAVE SAVE AND ADD ANOTHER CLOSE

**\*\* REQUIRED \*\***

- ❖ If your purchase contains equipment use account code 78120 for the equipment items.
- ❖ Must Change Ship to address to the Warehouse.





## Creating a Banner Purchase Order to Pay an Invoice

The goal of this exercise is to create a Purchase Order from an existing blanket contract.

Examples:

- Enterprise
  - Canon
    - Account Code for Monthly Rental = 74620
1. Navigate to the **Shop Page** (shop at the top).
  2. Enter identifying information such as the blanket contract number, the supplier, or a non-catalog item on the blanket contract. For this exercise, look for Vehicle Rental from Enterprise Rent A Car (BL00000205). Click **Go**.
  3. Select the item(s) that should be on the Purchase Order and **Add to Cart**. When done, click on the cart icon in the upper right-hand corner. Click View my Cart.
  4. Update the Shopping Cart Name and quantity fields as appropriate. Next click on Proceed to Checkout when ready.
  5. Complete the required fields.
  6. Attach the invoice in the Internal Attachments Section.
  7. When all is complete, **Submit Requisition**.
  8. When the requisition has completed the necessary approval workflow, the Banner PO will automatically be created.
  9. Click on the **Orders** icon to view your requisitions and/or PO's. Click on the Requisition or PO number to view more details. Once in the PO, click on **History** to view the history of the PO.



# Creating a Receipt

The goal of this exercise is to create a Receipt from a Banner Purchase Order.

1. Navigate to the **Orders** icon and click **Search** and choose the appropriate purchase order document.
2. Using the Search filter (if desired), find the PO you need to receive. Click on the PO number.
  - To add columns to your search results screen click the icon that looks like a gear in the upper right hand of the screen. (See screen shots below)
3. Can click on **Status, Receipts, or History** to see if any receipts have been completed.
4. Click on the word Purchase Order to choose either **Create Quantity Receipt** or **Create Cost Receipt** from the dropdown. (A quantity receipt is generally done for goods and copier rentals, and a cost receipt is generally done for services.)
5. Enter the **Receipt Date**.
  - Commodities = The date you received the goods.
    - Copier = The last day of the month you are paying.
  - Services = The last day the service was completed.
6. Enter the appropriate quantity in the Quantity field, then click **Complete**.
7. You can view the Receipt by clicking on the receipt number.

PO Number	Requisition Number	Supplier	Total Amount	Created Date/Time	PO Status	Receipt Status	Matching Status	Prepared By
PO090532	2948048	Stata Information Group (I)	59,020.00 USD	4/16/2020 9:21:10 AM	Completed	Fully Received	Fully Matched	Emily Vaughn
PO090531	2939039	Stata Information Group (I)	59,020.00 USD	4/13/2020 9:27:42 AM	Completed	Fully Received	Fully Matched	Emily Vaughn
PO087316	2926356	Promoverisity (I)	857.16 USD	3/03/2020 2:50:58 PM	Completed	No Receipts	No Matches	Donna Wallis
PO087315	2867249	Staples Business Advantage (I)	75.40 USD	3/11/2020 2:02:23 PM	Completed	No Receipts	No Matches	Donna Wallis
PO087314	2907711	Enterprise Rent A Car (I)	300.47 USD	3/2/2020 7:11:44 AM	Pending	Fully Received	Fully Matched	Emily Vaughn
PO087313	2907407	Sherwin Williams (I)	280.00 USD	2/28/2020 2:31:36 PM	Completed	No Receipts	No Matches	Emily Vaughn
PO087312	2907482	CCS Presentation Systems (I)	152,000.00 USD	2/28/2020 2:29:05 PM	Completed	No Receipts	No Matches	Emily Vaughn
PO087311	2907472	St. Louis Boiler Supply Co (I)	450,000.00 USD	2/28/2020 2:22:05 PM	Completed	No Receipts	No Matches	Emily Vaughn
PO087310	2907405	Sherwin Williams (I)	44.00 USD	2/28/2020 2:15:36 PM	Completed	No Receipts	No Matches	Emily Vaughn
PO087309	2907464	CCS Presentation Systems (I)	560.00 USD	2/28/2020 2:09:40 PM	Completed	No Receipts	No Matches	Emily Vaughn
PO087308	2907403	St. Louis Boiler Supply Co (I)	624.00 USD	2/28/2020 2:01:32 PM	Completed	No Receipts	Fully Matched	Emily Vaughn
PO087307	2907459	Sherwin Williams (I)	250.00 USD	2/28/2020 1:56:40 PM	Completed	No Receipts	Fully Matched	Emily Vaughn
PO087306	2907454	Smith Electric (I)	800.00 USD	2/28/2020 1:49:38 PM	Completed	No Receipts	Fully Matched	Emily Vaughn
PO087305	2907450	Herold-Citizen (I)	400.00 USD	2/28/2020 1:45:01 PM	Completed	No Receipts	Fully Matched	Emily Vaughn
PO087304	2907447	Sherwin Williams (I)	250.00 USD	2/28/2020 1:37:06 PM	Completed	No Receipts	Fully Matched	Emily Vaughn
PO087303	2897302	Enterprise Rent A Car (I)	300.47 USD	2/19/2020 2:29:19 PM	Completed	Fully Received	Fully Matched	Emily Vaughn
PO087302	2897163	Enterprise Rent A Car (I)	0.00 USD	2/19/2020 10:05:52 AM	Completed	No Receipts	No Matches	Emily Vaughn

Purchase Order • P0103397 Revision 0

Status Summary Revisions Confirmed

General Information

PO/Reference No. P0103397

Revision No. 0

Priority Normal

Supplier Name CCS Presentation System

Address 5530 Florida Mining Blvd Jacksonville, Florida 322 States

Phone +1 904-998-7227

Supplier Fax No. +1 904-998-7225

Purchase Order Date 7/19/2021

Total 1,300.00

Requisition Number 3296546 view print

A/P status Open

PO Classes Edit | View details

Attachments History

Billing/Payment

Bill To Tennessee Technological University Accounts Payable P.O. Box 5037 Cookeville, TN 38505 United States

BITA Address Code AP

Billing Options Accounting Date 7/19/2021 Payment Terms F.O.B. Destination

Delivery Options Expedite X Ship Via Best Carrier-Best Way

End User Information Owner Name Emily Vaughn

Completed

Details Supplier Status Sent To Supplier Supplier CCS Presentation Systems Total (1,300.00 USD) Subtotal 1,300.00 1,300.00

Related Documents Requisitions: 3296546

What's next? Workflow Status Completed Workflow Show skipped steps

# 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. Employers 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.
5. **Procurement Manual** provides instruction on all purchasing policies. If you will be making purchases or approving purchases for your area Purchasing Policy Training is recommended.
6. **Procard Manual** provides guidance on using the University Procard. Procard Holders are required to attend Procard Policy Training before a card can be issued. If you are a Reconciler of someone else's procard or signing off on procard statements, then it is recommended you also attend Procard Policy Training.



# Authority and Responsibility

Depending on your departmental 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).

