Tigerbuy Training

Welcome to Tigerbuy Training. Tigerbuy is the University's online eProcurement system. We will be covering basics of the Tigerbuy software to help you get started and navigate in the system.

Basic Purchasing Process

1. Shop
2. Create Requisition
3. Submit Requisition for Approval
4. Banner Budget Check
5. Review & Approval by Financial Manager
6. Approved Requisition flows through Procurement
7. Banner Budget Encumbrance
8. P0 issued to Vendor
9. Receive items or services in system
10. Invoice verified in system and paid
11. Close P0 & release funds

Tigerbuy User Roles

- **Requestor** - builds shopping carts to create purchase requisitions
- **Approver** - approves purchase requisitions for an Organization
- **Receiver** - verifies receipt of goods and services in the purchase order

The **Requestor** and the **Approver** are **2 separate individuals** for a purchase requisition. This provides for the separation of duties requirement for initiating and approving purchases for the University.

Purchase Requisition

Building a Purchase Requisition happens in a Tigerbuy shopping cart

Methods to Purchase

Purchases are either Catalog or Non-Catalog

Catalog Purchases - Requester selects items to purchase from a Vendor Catalog or Tigerbuy List to build a shopping cart.

Non-Catalog Purchases - Requester enters item or purchase information in a form to build a shopping cart.

Catalog Purchases

Punch-out Catalogs

Catalog Purchases

Hosted Catalog – We maintain these catalogs in the Tigerbuy site. These vendors have products included in Tigerbuy for searches using the "Shop" Search box.

Requesters can search by categories, vendor, or description to select products that fill a Tigerbuy Shopping Cart.

Do not combine Vendors in a shopping cart.

Non-catalog process

The Non-catalog process involves the Requestor typing the purchase information into the form to fill a shopping cart.

- Purchase information for a Non-catalog order might be from a quote, agreement, or vendor communication.

- When entering information from a Vendor quote, each line item __must__ be entered __separately__. This is required for accurate shipment, receipt of goods, and payment for each item from quote.

Non-catalog process

The Vendor must be in the Tigerbuy system to begin entry

Tigerbuy Specialty Forms

A form is a method of entering information in the Tigerbuy system for processing. All forms go into a Tigerbuy Shopping Cart to process through the Tigerbuy system.

- **Change Order** - Procurement makes all changes to a purchase order once it has been issued.

- **Moving Services** – Procurement orders moving services

- **Vendor Payment Form** (exception only) – used to pay vendor when Request & PO were not done

Change Order

- Changes can be increasing or decreasing units, unit cost, adding a line or cancelling a line, closing balances left on orders, cancelling orders.

- If you increase a purchase order, the <u>dollar amount of the increase</u> should be entered by line in the form for the requisition.

- Explanations for the change should be stated in the "Product Description" box.

Moving Services

Moving Services

Available Actions: [Add and go to Cart ▼] [Go] [Close] 🖶

Supplier Info		?
Supplier	Bid Supplier	
Fulfillment Address	Fulfillment Address 1:	

General Info		?

Non-Configurable Fields

GeneralInstructions

This form is to be used when a local (campus) move is being requested. Account number 74986 must be used in the FOAPAL. Complete and attach Specification Sheet for Local Moves http://bf.memphis.edu/forms/procurement/move.pdf.

All attachments and notes can be added in cart review.

Form Type
Product Description

External Service Request

254 characters remaining   expand | clear

Quantity   1

Estimated Price   0.00

To
See confi

The University of Memphis
Specification Sheet for Local Campus Moves

Requisition Number: _____ Contact Person: _____ Date: _____
Department: _____ Phone Number: _____

Desired Move Date: _____

Budget Account: _____

Moving From:			*Moving To:*		
Building:		Floor:	Building:		Floor:
Rooms:			Rooms:		
Loading Dock?	○Yes ○No		Loading Dock?	○Yes ○No	
Adjacent Parking?	○Yes ○No		Adjacent Parking?	○Yes ○No	
Elevator?	○Yes ○No		Elevator?	○Yes ○No	
Stairs?	○Yes ○No		Stairs?	○Yes ○No	

Items to be moved:

Special Requests:

Special Needs: ☐ Boxes   ☐ Tape   ☐ Labels

Vendor Payment Form

Vendor Payment | Exceptions ONLY | Available Actions: Add and go to Cart | Go | Close

Supplier Info ?

Enter Supplier

or
Supplier Search

General Info ?

Non-Configurable Fields

GeneralInstructions

The Vendor Payment Form is only intended to be used on an exception basis, e.g., small dollar repairs of equipment, must physically go to the store and select the item, the system is down and items are needed on an emergency basis.Please use this form for invoices that require a payment to a supplier/vendor not associated to an established purchase order. Fax invoices to ACCOUNTS PAYABLE (3595), or mail to AD275. Reference the purchase order number on all documents. Receive all quantities for payment of your invoice. THIS FORM SHOULD ONLY BE USED FOR PURCHASES less than $10,000.00 and should ONLY be used on an EXCEPTION basis.

Form Type | Vendor Payment

Product Description

254 characters remaining   expand | clear

Quantity

Packaging (UOM) | EA - Each

Estimated Price

Total 0.00

See configuration for this form

Receipting

The Receiver verifies the receipt of goods and services in a Tigerbuy Purchase Order. Receipting is the approval that the Organization is ready to pay for a purchase.

- **Quantity Receipt** - Use this for tangible items, such as supplies.
- **Cost Receipt** - Use this method to authorize specific dollar amounts, such as for services.

Returning

Returns are always a three-part process:

1. **Communicating** with the vendor involved to initiate the physical return process and to get information on receiving credit. A Credit Memo from the Vendor is required when there is a return. Invoice will not be paid until credit is received.

2. **Internally processing** the return in the Tigerbuy Purchase Order, ensuring the invoice and credit involved are processed correctly.

3. **Physically returning** the item to the vendor if required

Returning

Any item returned to vendor has to be Received in the system and then Returned.

To create a return in the system, create a quantity receipt document and select **returned** for the line being returned and enter the unit(s) returned.
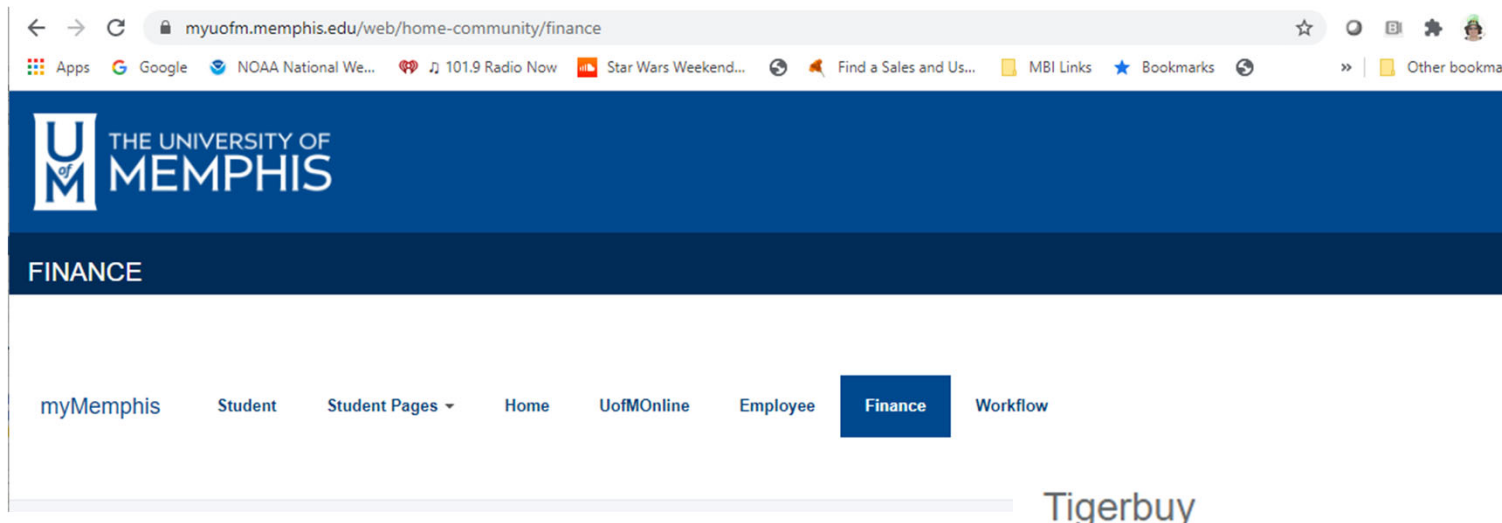
Tigerbuy Live demo

- Shop (catalogs, non-catalog, moving)
- Create Requisition (shopping cart / Tigerbuy cart)
- Submit Requisition for Approval
- Receive items or services in system
- Returns & Changes
- Close P0 & release funds

Logging in to Tigerbuy Production

Tigerbuy Production will not open if you do not have Banner Access.

Navigation BAR-left side of page
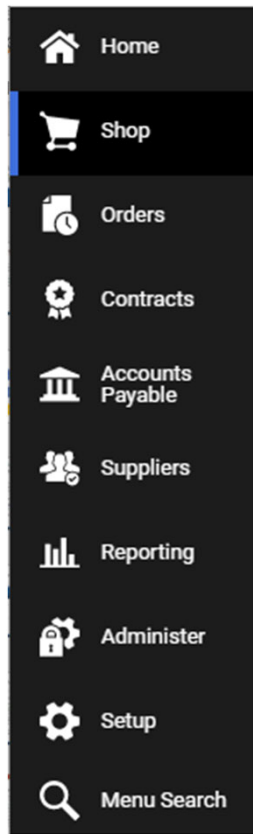
Icons located here take you to specified areas within Tigerbuy. The important pages are:

Shop/My Carts and Orders/View Carts
This path takes you to the Cart Management screen for users

Orders/Search
This path takes you to the Tigerbuy search screens

Orders/Approvals
Requisitions to Approve (Pending Requisitions for Approver)
Requisitions Recently Approved by Me

Main Workspace of Home Shopping Page

Search bar for hosted catalog items

Specialty forms are for special issues. Each form is unique for what it is used for and each form has instructions for use when opened.

Tigerbuy Message Board
Information and quick links to assist Users with the eProcurement System.

Purchasing Showcase
This is where you begin all purchases.

This area is set up to with links and icons to access vendor catalogs (Punch-outs) and search for vendors and products from participating vendor catalogs (Hosted Catalogs). There are many search options and filters to narrow searches.

Process Overview

Need identified

Select items from catalogs, add non-catalog items, or use specialty forms

Add Items to TigerBuy shopping cart

Checkout to create Requisition and add any necessary documents

Review Requisition. Place Order to Submit Requisition

System performs Budget Check

Requisition routed to Organization approver

Approved Requisition routes to Procurement for any necessary action

System creates Encumbrance in Banner

Purchase Order is issued and transmits to Vendor

Product or Service arrives at University

Organization verifies Receipt in system

Invoices arrive in Accounts Payable

Invoices are verified against receipts and paid

Completed POs close. Open funds require a Change Order to close