

Approver Guide

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What are my responsibilities as the Department Approver?

As the department approver you are verifying that department purchases and any disbursement of funds are made in accordance with the State of Texas laws, applicable statutes and regulations, the State Comptroller's guidelines ([Expendit](#)), [Texas A&M System regulations](#), [Texas A&M Rules and Standard Administrative Procedures](#) and [Texas A&M University Disbursement Guidelines](#) which are derived from the sources above.

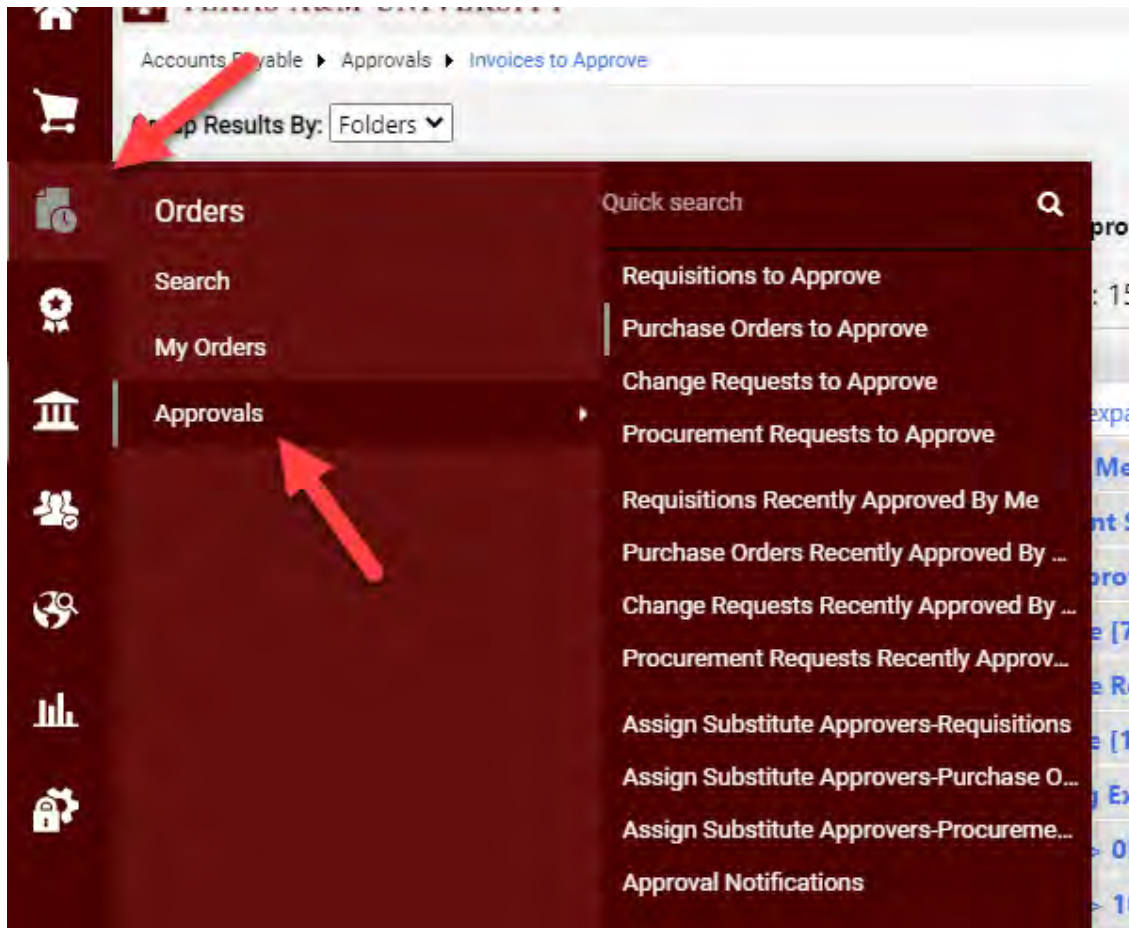
How do I locate documents that I need to approve?

There are multiple ways to get to the documents that are waiting for your review and approval

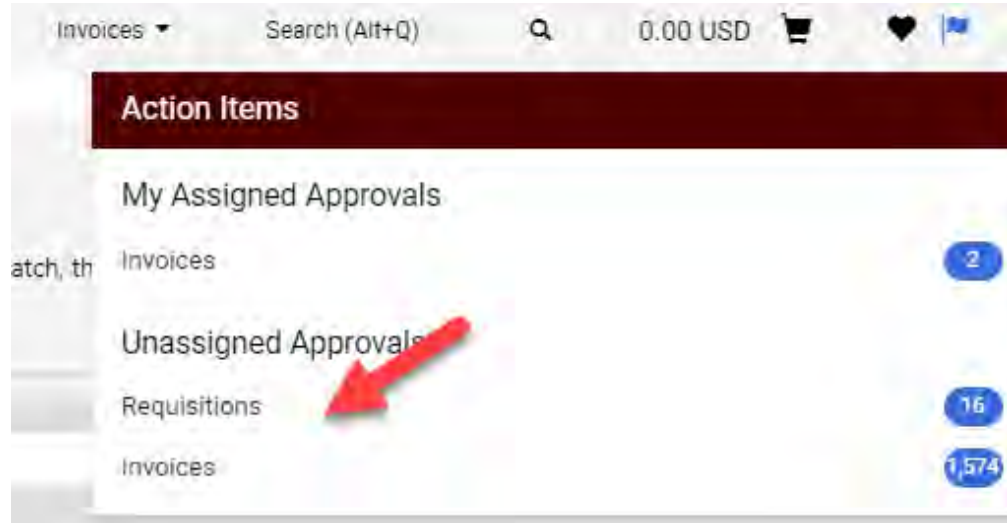
1. Click on the **Action Items** Icon – if items are needing approval a number in red will show next to the action items icon.
 - a. My Assigned Approvals
 - i. These are invoices and requisitions that you have assigned but have not approved
 - b. Unassigned Approval
 - i. These are invoices and requisitions that need to be reviewed and approved



2. From the **Documents** icons on the side



Note: If an invoice is awaiting approval it will appear just below the Requisitions



Approving Documents

To review the document for approval simply select the document number. Note: The approver can view results as a list or by folder. If folder is selected it will show each folder and the user can then select the document number from each folder. The list view will show them all in the sort by order. It is recommended to change the “Sort by” to “Submit date oldest first”.

Group Results By: List

Showing 15 of 15 Results

Results Per Page: 20

Sort by: Submit date oldest first

Hide requisition details

Requisition No.	Suppliers:	Assigned Approver	PR Date/Time	
144152698	ROESSLER EQUIPMENT COMPANY	Not Assigned	5/17/2021 1:10 PM	Timothy Pehl
CartName: 2021-05-17 Pehl			Folders	0 Days in folder [Con
No. of line items: 1				
144190948	MSC INDUSTRIAL SUPPLY CO INC	Not Assigned	5/18/2021 9:57 AM	William Seward
CartName: 2021-05-18 Seward			Folders	0 Days in folder [Con
No. of line items: 1				
144209121	BROOKFIELD ENGINEERING LABORATORIES	Not Assigned	5/18/2021 1:16 PM	Ramalakshmi Ak
CartName: 2021-05-18 926009005 01			Folders	0 Days in folder [Con
No. of line items: 1				
144210417	SWAGelok SOUTHEAST TEXAS C&J & ASSOCIATES DBA	Not Assigned	5/18/2021 1:31 PM	Ramalakshmi Ak
CartName: 2021-05-18 926009005 02			Folders	0 Days in folder [Con
No. of line items: 9				
144192613	Avinext (Quotes)	Not Assigned	5/18/2021 1:53 PM	Brittain Bertrand
CartName: 2021-05-18 724003256 01			Folders	0 Days in folder [Con
No. of line items: 11				
144229131	W A HAMMOND DRIERITE COMPANY LTD	Not Assigned	5/18/2021 5:41 PM	Jeanette Pina
CartName: 2021-05-18 725004699 02			Folders	0 Days in folder [Con
No. of line items: 1				
144243931	O'REILLY AUTO PARTS O'REILLY AUTO ENTERPRISES DBA	Not Assigned	5/19/2021 9:13 AM	By Departmenta
CartName: O'Reilly Auto Parts			Folders	0 Days in folder [Con
No. of line items: 1				

Filtered by

Type: Requisitions

Date Range: All Dates

View Approvals For: Amy Deaton

State

Not Assigned

Filter My Approvals

Type

Requisitions

Date Range

All Dates

Supplier

TOLEDO TICKET COMPANY THE (1)

Avinext (Quotes) (1)

MSC INDUSTRIAL SUPPLY CO INC (1)

BRAZOS VALLEY WELDING SUPPLY INC (1)

Supplier Class

TAMU Contract (4)

Catalog - (No \$ Limit) (3)

Sole Proprietorship (2)

HUB - Hispanic-American owned (1)

Department

The document summary will appear as shown below.

Requisition : 144152698

Summary | Taxes/SSH | PO Preview | Comments | Attachments | History

General | **Shipping** | **Billing** | **Pending**

Status: Pending
Commodity Code Assigner

Submitted: 5/17/2021 1:10 PM

Ordering Department: 02-CHEM-00050 (02-CHEM-00050)

Business Unit: 02-Texas A&M University (02)

Cart Name: 2021-05-17 Pehl

Share cart: No user groups available

Prepared by: Timothy Pehl

Cart Description/Purpose: 02 Sensor for Hilly NMR room

Order Category: 1 - Regular

Report Reference A: no value

Report Reference B: no value

Pre-Pay & Add:

Route to Procurement Services:

Emergency (attach justification):

Sole Source (attach justification):

Contact Number: no value

Ship To

Attn: Timothy Pehl
Chemistry Dept.
Chemistry Bldg.
Room 014
Corner of Spence/Ross St.
3255 TAMU
College Station, TX 77843-3255
United States

Delivery Options

Ship Via: Best Carrier-Best Way
Requested Delivery Date: no value

Buyer Information

Buyer	Buyer Email	Buyer Phone Number
no value	no value	no value

Report Codes-1

USAS One	USAS Two	LDT Code
no value	no value	no value

Report Codes-2

Shade Order Number: no value

Bill To

Texas A&M University-EDM
Do Not Mail Invoices
Email invoices to tamu invoices@edmgrou.com
PO BOX 3687
Scranton, PA 18505
United States

Pending

Total (342.00 USD)

Subtotal	342.00
Shipping	0.00
Handling	0.00
Total	342.00

Assign To Myself

What's next?

Work-Flow

- Submitted (5/17/2021 1:10 PM) Timothy Pehl
- Department Allocator (Assigned) Jessica Nunez
- Commodity Code Assigner (Assigned)
- Budget Check (Future)
- Final Dept Approver (Future)
- Budget Check 2 (Future)

1. Assign the requisition to yourself (optional)
2. Verify that the purchase/payment request is within disbursement guidelines and allocated to the appropriate account(s).
3. Then select Approve & Show Next from the Available Actions drop down. If an approver will need to return (preferred method) or reject a requisition the approver must "Assign" the requisition to see those available actions.

Summary | Taxes/SSH | PO Preview | Comments | Attachments | History

General | **Shipping** | **Billing** | **Pending**

Status: Pending
Commodity Code Assigner

Submitted: 5/17/2021 1:10 PM

Ordering Department: 02-CHEM-00050 (02-CHEM-00050)

Business Unit: 02-Texas A&M University (02)

Cart Name: 2021-05-17 Pehl

Share cart: No user groups available

Prepared by: Timothy Pehl

Cart Description/Purpose: 02 Sensor for Hilly NMR room

Order Category: 1 - Regular

Report Reference A: no value

Ship To

Attn: Timothy Pehl
Chemistry Dept.
Chemistry Bldg.
Room 014
Corner of Spence/Ross St.
3255 TAMU
College Station, TX 77843-3255
United States

Delivery Options

Ship Via: Best Carrier-Best Way
Requested Delivery Date: no value

Bill To

Texas A&M University-EDM
Do Not Mail Invoices
Email invoices to tamu invoices@edmgrou.com
PO BOX 3687
Scranton, PA 18505
United States

Pending

Total (342.00 USD)

Subtotal	342.00
Shipping	0.00
Handling	0.00
Total	342.00

Assign To Myself

Approve & Show Next

Approve

Requisition : 144152698

Summary | Taxes/SSH | PO Preview | Comments | Attachments | History

General | **Shipping** | **Billing** | **Pending**

Status: Pending
Commodity Code Assigner (Amy Deaton)

Submitted: 5/17/2021 1:10 PM

Ordering Department: 02-CHEM-00050 (02-CHEM-00050)

Business Unit: 02-Texas A&M University (02)

Cart Name: 2021-05-17 Pehl

Share cart: No user groups available

Prepared by: Timothy Pehl

Cart Description/Purpose: 02 Sensor for Hilly NMR room

Order Category: 1 - Regular

Report Reference A: no value

Ship To

Attn: Timothy Pehl
Chemistry Dept.
Chemistry Bldg.
Room 014
Corner of Spence/Ross St.
3255 TAMU
College Station, TX 77843-3255
United States

Delivery Options

Ship Via: Best Carrier-Best Way
Requested Delivery Date: no value

Bill To

Texas A&M University-EDM
Do Not Mail Invoices
Email invoices to tamu invoices@edmgrou.com
PO BOX 3687
Scranton, PA 18505
United States

Pending

Total (342.00 USD)

Subtotal	342.00
Shipping	0.00
Handling	0.00
Total	342.00

Approve & Show Next

Approve

Return to Shared Folder

Return to Requisitioner

Submitted (5/17/2021 1:10 PM) Timothy Pehl

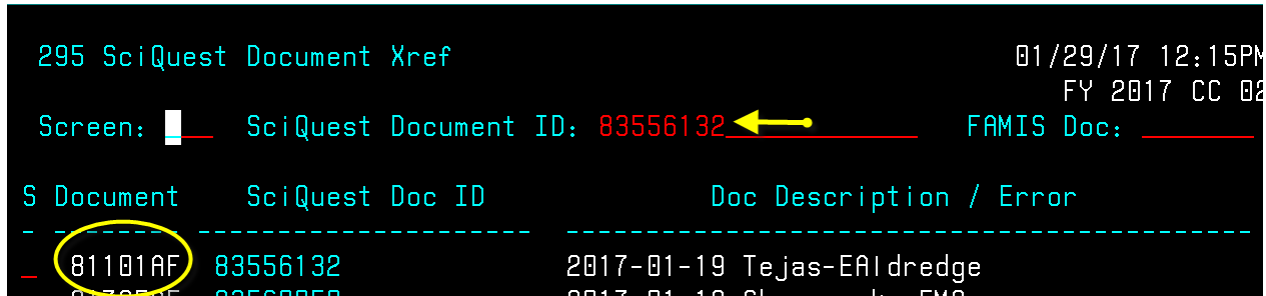
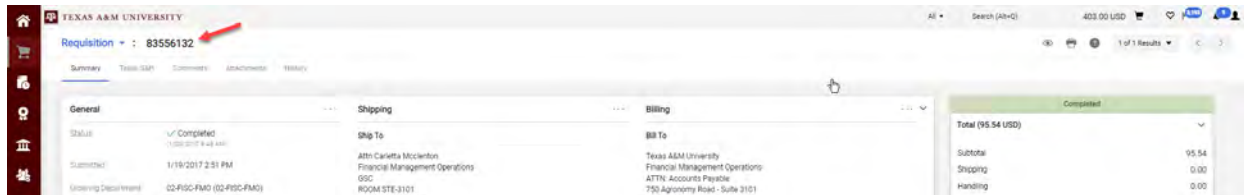
Requisition Available Actions

1. Approve/Complete & Show Next
 - a. This will approve the current requisition and automatically open the next requisition to be reviewed
2. Approve/Complete Step
 - a. This will approve the requisition, but you will stay on the current document
3. Return to Shared Folder
 - a. You have assigned a document but will not be processing it. Returning it to the shared folder allows another approver to assign and process document
4. Return to Requisitioner
 - a. Returns the document to the creator for revisions (please remember to add notes to identify why it is being returned to requisitioner)
 - b. only you do not have the ability to send the note to a user
5. Reject Requisition
 - a. Rejecting the document is cancelling it. The creator is not able to resubmit

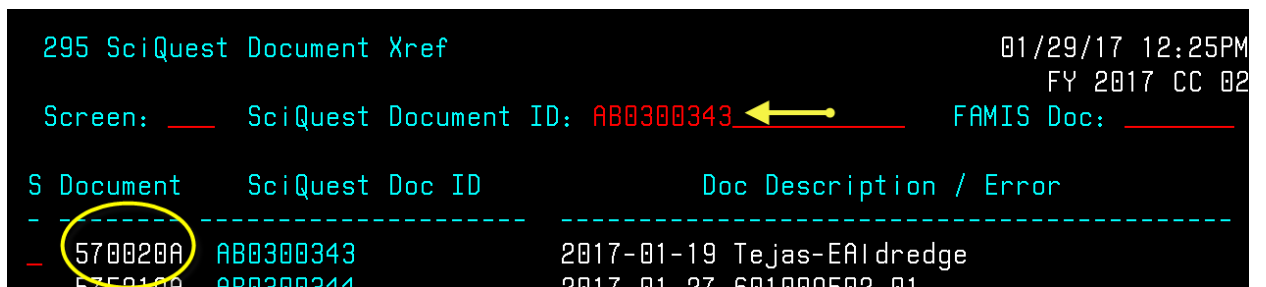
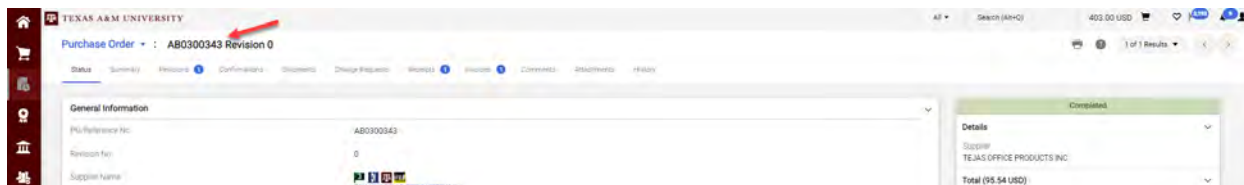
How to Locate AggieBuy Documents in FAMIS

Enter the AggieBuy document number to screen 295 in FAMIS in the SciQuest Document Id field

Requisition

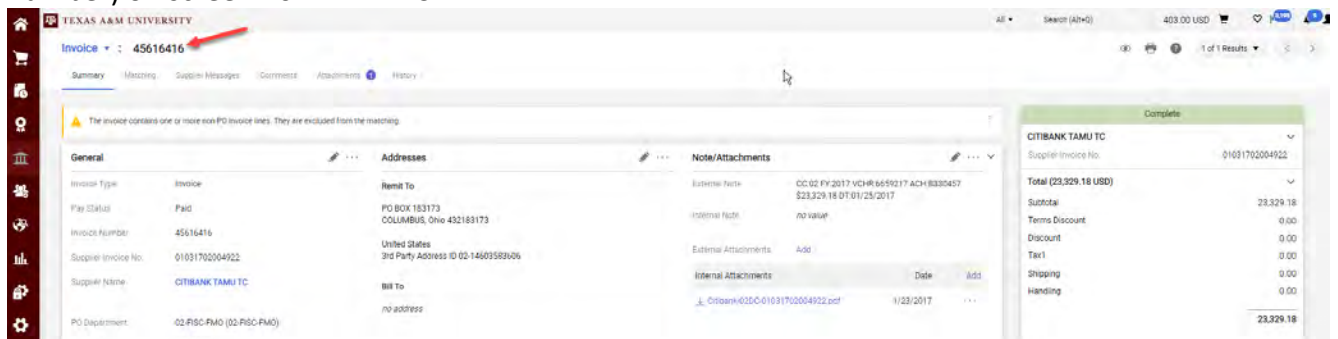


Purchase Order



Non PO based invoices

Enter the last 7 digits of the AggieBuy invoice number (not the same as the supplier invoice number) on screen 167 in FAMIS



```

F2321 Make selection to proceed to screen 168
167 Voucher Inquiry by Dept Ref                                01/29/17 12:30
                                                                FY 2017 CC 02
Screen:  █ Dept Ref: 5616416 Fiscal Yr: 2017 Pg 1 of 1 Viewed Pg(s)
  Dept      Vch
S Ref      Voucher Lns      Vendor Name      Stat      Net Amount      Description
-----
- 5616416 6659217 1 CITIBANK TAMU DC      PAID      23,329.18      TAMU (02) CI
- 56182   6558216 1 CDW GOVERNMENT INC    PAID      150.54         DISPL AY MOUN
  
```

How to Locate FAMIS Documents in AggieBuy

Requisition or Purchase Order

Enter the FAMIS document on screen 295 in the FAMIS doc field

```

295 SciQuest Document Xref                                01/29/17 12:19PM
                                                                FY 2017 CC 02
Screen:  █ SciQuest Document ID: _____ FAMIS Doc: 81785AF
S Document      SciQuest Doc ID      Doc Description / Error
-----
- 81785AF      83560050      2017-01-19 Chesapeake-FMO
- 8178600      27000000      2012-02-21RMEHiltonInvoice45824-2 13 12
  
```

The screenshot shows the AggieBuy search interface. At the top, the user name 'Cindy Glover' is visible. A search bar contains the text 'All' and '83560050'. Below the search bar, a 'Quick Search' dropdown menu is open, displaying search results. The first result, '83560050 - Requisitions', is circled in red. The second result is 'AB0300349 - Purchase Orders'. The interface also includes a 'Hide value descriptions' link at the bottom right.

Non PO based invoice

Find the supplier invoice number from the voucher

```
F2321 Make selection to proceed to screen 169
168 Voucher Total Inquiry                                01/29/17 12:35
                                                         FY 2017 CC 02

Screen: 1 Voucher: 6659217 Fiscal Year: 2017

Vendor: 14603583606 CITIBANK TAMU DC                    Status: PAID
Alt Vndr:                                                Hold: N      Pend:
Due Dt: 01/25/2017 Desc: TAMU (02) CITIBANK MONTHL    Encl:        Wire: N
Inv Dt: 01/03/2017 Cust AR Nbr:                        St Vchr: N
Divry Dt: 01/03/2017 GSC Ord:                          Revolv: N
Dept Ref: 5616416 Cont Wk Force: N Confidential:      Chg Src: N
Tran Cd: 140 FAMIS Trace: B330457 St Warrant Nbr:
St Req Nbr: ACH Dt: 01/25/2017 Warrant Dt:
Vchr Total: 23329.18 Check Recon: USAS Doc Type: PCC:
Bank Trace: 091000013063117 IC: Reason: Orig Dist Dt:
S Itm Account Net Amount PO No. Invoice Number Bank Dp Vd XRef
-----
1 011170 000000 1615 23,329.18 01031702004922 06000 N N
```

Cindy Glover ▾ All ▾ 01031702004922 🔍

Quick Search Alt + Q

Document

45616416 Invoices

Document Search