

Approver Guide

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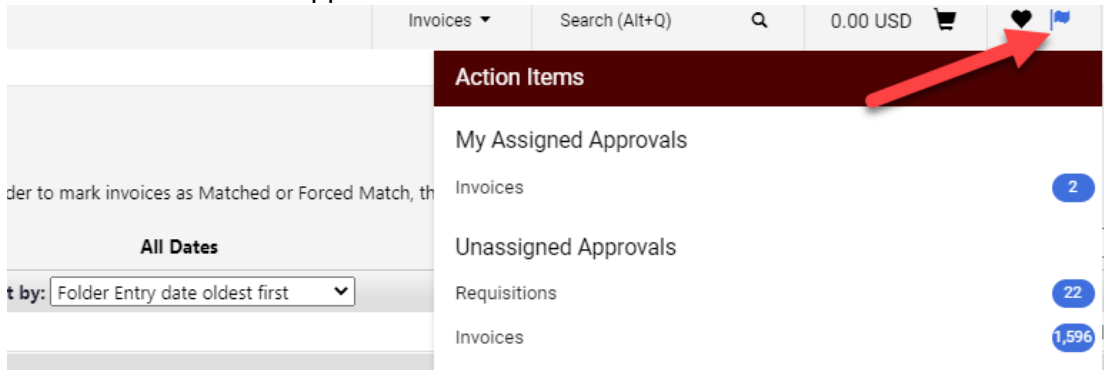
What are my responsibilities as the Department Approver?

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.

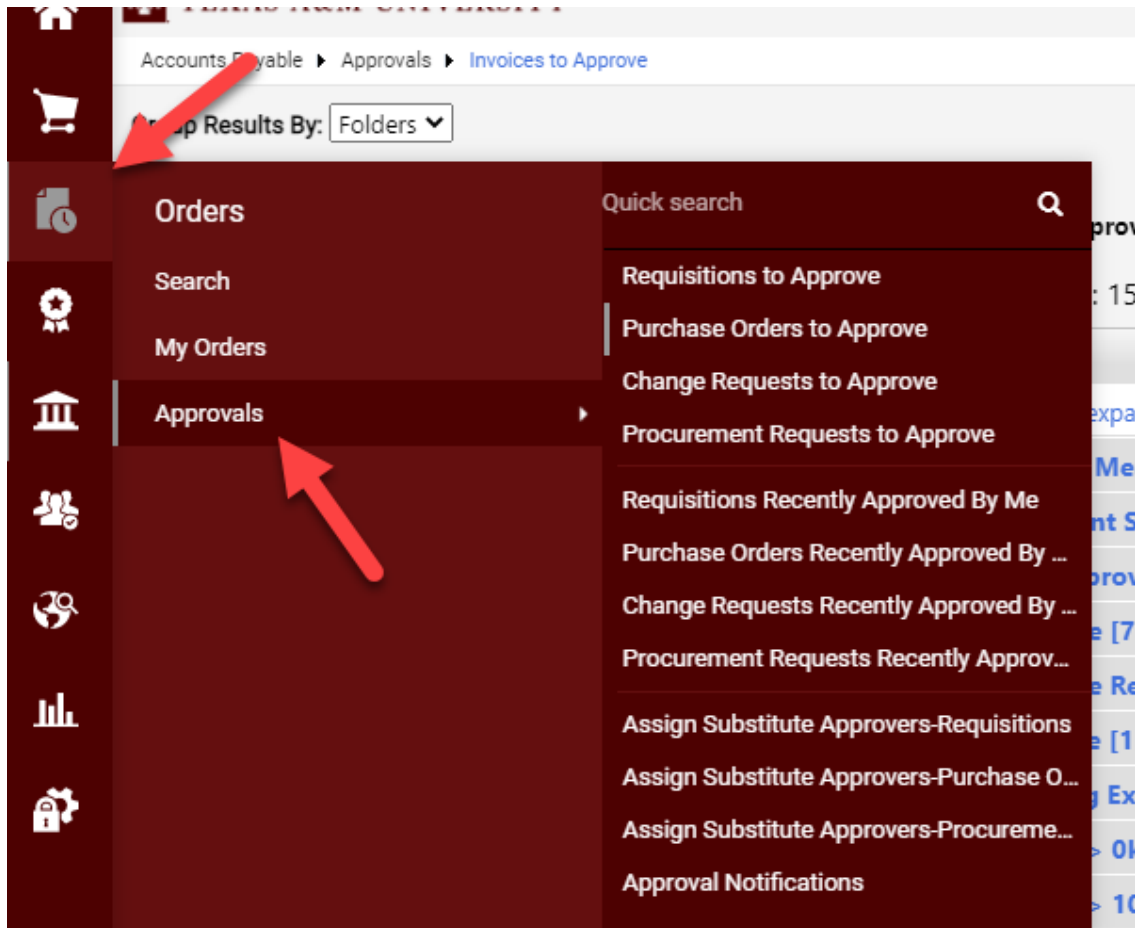
How do I locate documents that I need to approve?

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

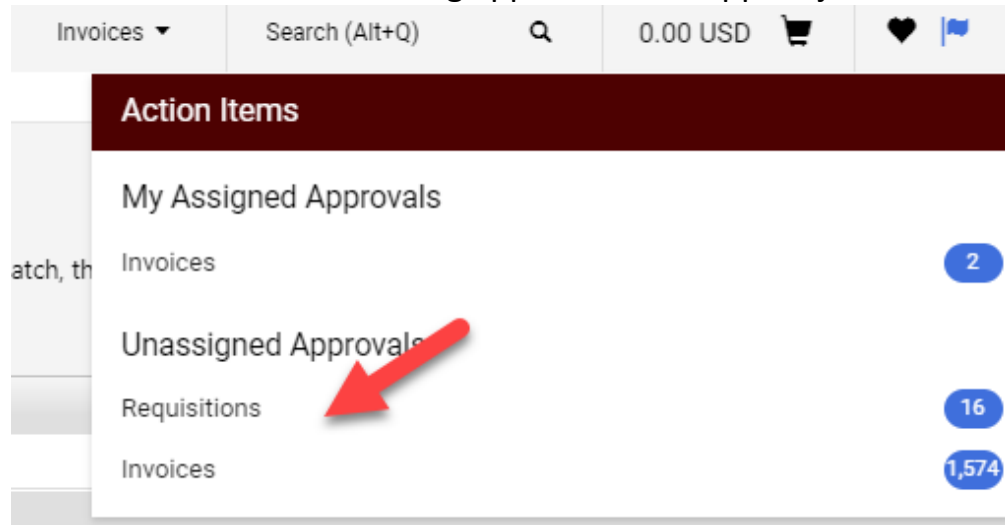
1. Click on the **Action Items** Icon – if items are needing approval a number in red will show next to the action items icon.
 - a. My Assigned Approvals
 - i. These are invoices and requisitions that you have assigned but have not approved
 - b. Unassigned Approval
 - i. These are invoices and requisitions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

Showing 1 of 15 Results

Results Per Page: 20

Sort by: Submit date oldest first

Requisition No.	Suppliers:	Assigned Approver	PR Date/Time	
144152698	ROESSLER EQUIPMENT COMPANY	Not Assigned	5/17/2021 1:10 PM	Timothy Pehl
144190948	MSC INDUSTRIAL SUPPLY CO INC	Not Assigned	5/18/2021 9:57 AM	William Seward
144209121	BROOKFIELD ENGINEERING LABORATORIES	Not Assigned	5/18/2021 1:16 PM	Ramalakshmi Ak
144210417	SWAGelok SOUTHEAST TEXAS C&J & ASSOCIATES DBA	Not Assigned	5/18/2021 1:31 PM	Ramalakshmi Ak
144192613	Avinext (Quotes)	Not Assigned	5/18/2021 1:53 PM	Brittain Bertrand
144229131	W A HAMMOND DRIERITE COMPANY LTD	Not Assigned	5/18/2021 5:41 PM	Jeanette Pina
144243931	O'REILLY AUTO PARTS O'REILLY AUTO ENTERPRISES DBA	Not Assigned	5/19/2021 9:13 AM	By Departmenta

The document summary will appear as shown below.

Requisition : 144152698

Summary Taxes/S&H PO Preview Comments Attachments History

General	Shipping	Billing
Status Pending Commodity Code Assigner	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	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
Submitted 5/17/2021 1:10 PM	Delivery Options Ship Via Best Carrier-Best Way Requested Delivery Date no value	
Ordering Department 02-CHEM-00050 (02-CHEM-00050)	Buyer Information Buyer Buyer Email Buyer Phone Number no value no value no value	
Business Unit 02-Texas A&M University (02)	Report Codes-1 USAS One USAS Two LDT Code no value no value no value	
Cart Name 2021-05-17 Pehl	Report Codes-2 State Order Number no value	
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) ✗		
Contract Number no value		

Pending

Total (342.00 USD)

Subtotal	342.00
Shipping	0.00
Handling	0.00
Total	342.00

Assign To Myself

What's next?

Workflow

- Submitted 5/17/2021 1:10 PM Timothy Pehl
- Department Allocator Approved Jessica Nunez
- Commodity Code Assigner Active
- 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/S&H PO Preview Comments Attachments History

General	Shipping	Billing
Status Pending Commodity Code Assigner	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	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
Submitted 5/17/2021 1:10 PM	Delivery Options Ship Via Best Carrier-Best Way	
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		

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/S&H PO Preview Comments Attachments History

General	Shipping	Billing
Status Pending Commodity Code Assigner (Amy Deaton)	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	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
Submitted 5/17/2021 1:10 PM	Delivery Options Ship Via Best Carrier-Best Way Requested Delivery Date no value	
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		

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

TEXAS A&M UNIVERSITY
Requisition : 83556132
Status: Completed (1/20/2017 9:48 AM)
Submitted: 1/19/2017 2:51 PM
Ordering Department: 02-FISC-FMO (02-FISC-FMO)

Shipping
Ship To: Altn Carletta Mcclellan, Financial Management Operations, GSC, ROOM STE-3101

Billing
Bill To: Texas A&M University, Financial Management Operations, ATTN: Accounts Payable, 750 Agronomy Road - Suite 3101

Completed
Total (95.54 USD)
Subtotal: 95.54
Shipping: 0.00
Handling: 0.00

295 SciQuest Document Xref
01/29/17 12:15PM
FY 2017 CC 02
Screen: SciQuest Document ID: 83556132 FAMIS Doc:
S Document SciQuest Doc ID Doc Description / Error
81101AF 83556132 2017-01-19 Tejas-EAl dredge
2017-01-19 Chesapeake FMO

Purchase Order

TEXAS A&M UNIVERSITY
Purchase Order : AB0300343 Revision 0
Status: Summary Revisions Confirmations Shipments Change Requests Receipts Invoices Comments Attachments History

General Information
PO/Reference No.: AB0300343
Revision No.: 0
Supplier Name: [Supplier Logo]

Details
Supplier: TEJAS OFFICE PRODUCTS INC
Total (95.54 USD)

295 SciQuest Document Xref
01/29/17 12:25PM
FY 2017 CC 02
Screen: SciQuest Document ID: AB0300343 FAMIS Doc:
S Document SciQuest Doc ID Doc Description / Error
570020A AB0300343 2017-01-19 Tejas-EAl dredge
570010A AB0300344 2017-01-27 601000502 01

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

TEXAS A&M UNIVERSITY
Invoice : 45616416
Summary Matching Supplier Messages Comments Attachments History

General
Invoice Type: Invoice
Pay Status: Paid
Invoice Number: 45616416
Supplier Invoice No.: 01031702004922
Supplier Name: CITIBANK TAMU TC
PO Department: 02-FISC-FMO (02-FISC-FMO)

Addresses
Remit To: PO BOX 183173, COLUMBUS, Ohio 432183173, United States, 3rd Party Address ID 02-14603583606
Bill To: no address

Note/Attachments
External Note: CC:02 FY:2017 VCHR:6659217 ACH:0330457 \$23,329.18 DT:01/25/2017
Internal Note: no value
External Attachments: Add
Internal Attachments: Add
Citibank-G2DC-01031702004922.pdf 1/23/2017

CITIBANK TAMU TC
Supplier Invoice No.: 01031702004922
Total (23,329.18 USD)
Subtotal: 23,329.18
Terms Discount: 0.00
Discount: 0.00
Tax1: 0.00
Shipping: 0.00
Handling: 0.00
23,329.18

```

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
  
```

Cindy Glover ▾ All ▾ 83560050 🔍

Quick Search Alt + Q

Document

- 83560050 - Requisitions
- AB0300349 - Purchase Orders

es | Extern

Hide value descriptions

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
Dlvry 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