

# **AGGIEBUY APPROVERS TRAINING**

# DEPARTMENT APPROVERS RESPONSIBILITIES:

- 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, Texas A&M System regulations and Texas A&M University- Commerce guidelines

\*\*Additional training information can be found on the purchasing webpage\*\*

# 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.

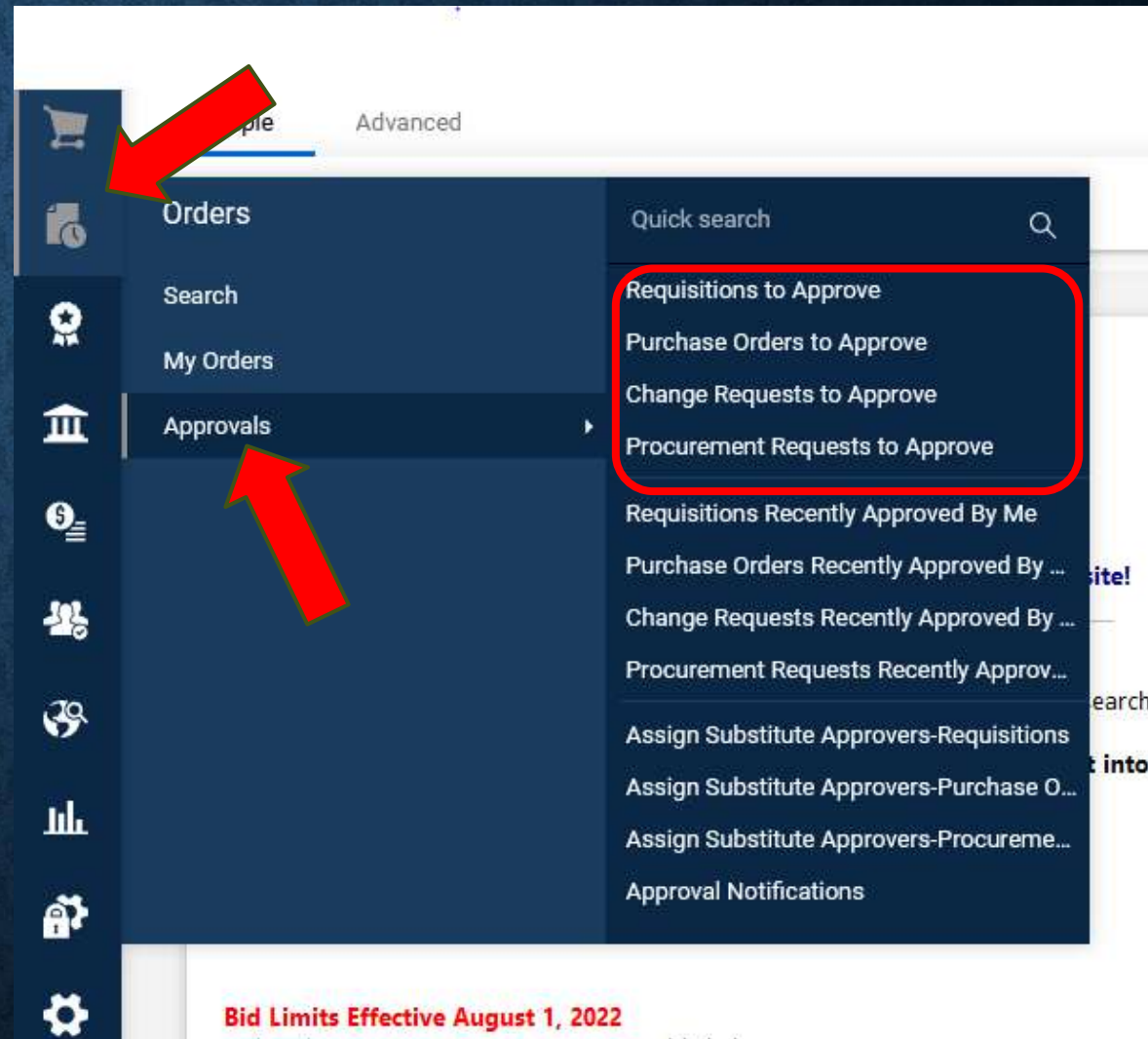
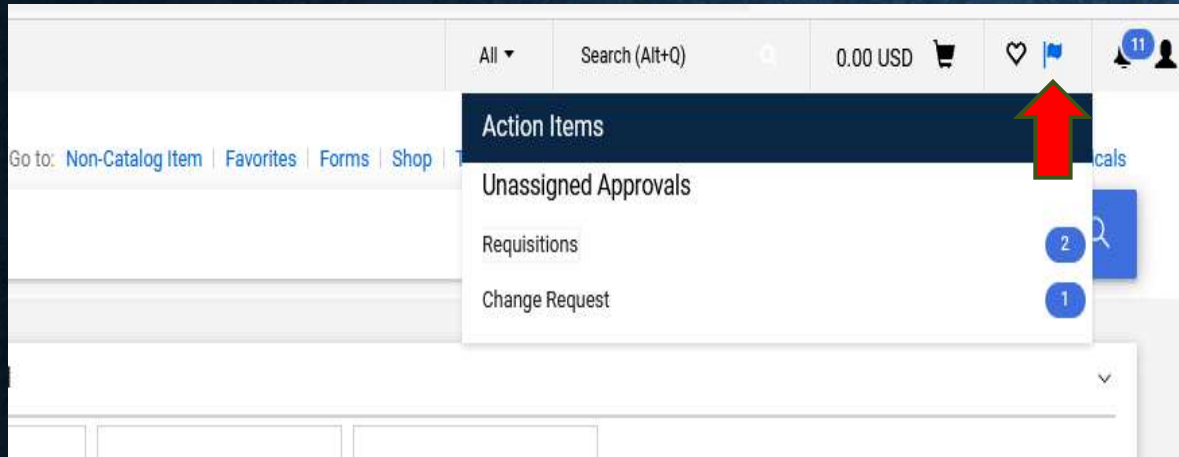
a. My Assigned Approvals

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

# Examples of where to look for approvals:



# 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”.

# Assign the requisition to yourself (optional)

| REQUISITION NO. | SUPPLIERS                             | ASSIGNED APPROVER | PR DATE/TIME        | REQUISITIONER  | AMOUNT        |
|-----------------|---------------------------------------|-------------------|---------------------|----------------|---------------|
| 193260795       | AIR CONDITIONING INNOVATIVE SOLUTIONS | Not Assigned      | 10/29/2024 12:37 PM | Margaret Depue | 16,057.33 USD |
| 193655114       | RED RIVER LANDSCAPING INC             | Not Assigned      | 10/29/2024 12:00 PM | Sandy Barnes   | 1,035.00 USD  |
| 193004490       | RED RIVER LANDSCAPING INC             | Not Assigned      | 10/29/2024 11:56 AM | Sandy Barnes   | 200.00 USD    |

Click here to assign to yourself

## The requisition will look like

Requisition • 193260795

Assign To Myself 3 of 3 Results

Summary Taxes/SSH PO Preview Comments Attachments 2 History

| General  | Shipping   | Billing  |             |                    |          |          |          |  |
|--|--|--|-------------|--------------------|----------|----------|----------|--|
| <b>Status:</b> Pending<br>21-Purchasing Approval Com             | <b>Ship To</b><br>Attn: Margaret DePue<br>Dallas Campus<br>6750 N Central Expy<br>Dallas, TX 75231<br>United States  | <b>Bill To</b><br>Texas A&M University Commerce<br>***Do Not Mail Invoices***<br>Email invoices to <a href="mailto:invoices@tamuc.edu">invoices@tamuc.edu</a><br>PO Box 3011<br>Commerce, TX 75429<br>United States  |             |                    |          |          |          |  |
| <b>Submitted:</b> 10/29/2024 12:37 PM                            | <b>Delivery Options</b><br>Ship Via: Best Carrier Best Way<br>Requested Delivery Date: no value<br>Pre-Pay & Add: X  | <b>Accounting Info</b><br>Do Not Encumber: X<br>Rush the Pymt Process: X<br>Special Payment Method: no value<br>Cost Receipt Required: <input checked="" type="checkbox"/><br>IFR (Item for Resale): X<br>Trade-in: X<br>Create Asset Manually: X<br>Add to Asset Number: no value |             |                    |          |          |          |  |
| <b>Business Unit:</b> 21-Texas A&M University - Commerce (21)    | <b>Procurement Services</b><br><table border="1"><thead><tr><th>Buyer</th><th>Buyer Email</th><th>Buyer Phone Number</th></tr></thead><tbody><tr><td>no value</td><td>no value</td><td>no value</td></tr></tbody></table><br>Emergency (attach justification): X<br>Sole Source (attach justification): X<br>HSP-PAR Required: X | Buyer  | Buyer Email | Buyer Phone Number | no value | no value | no value |  |
| Buyer  | Buyer Email  | Buyer Phone Number   |             |                    |          |          |          |  |
| no value   | no value   | no value   |             |                    |          |          |          |  |
| <b>Ordering Department:</b> 21-VPBA (21-VPBA)                    | <b>Routing Info</b>  |  |             |                    |          |          |          |  |
| <b>Cart Name:</b> 2024-10-18 925006326 01                        |  |  |             |                    |          |          |          |  |
| <b>Share cart:</b> No user groups available                      |  |  |             |                    |          |          |          |  |
| <b>Prepared by:</b> Ganifer Hartfield                            |  |  |             |                    |          |          |          |  |
| <b>Prepared for:</b> Margaret Depue                              |  |  |             |                    |          |          |          |  |
| <b>Cart Description/Purpose:</b> no value                        |  |  |             |                    |          |          |          |  |
| <b>Software and/or Cloud Services:</b> X (attach IT Review Form) |  |  |             |                    |          |          |          |  |
| <b>Order Category:</b> 1 - Regular                               |  |  |             |                    |          |          |          |  |
| <b>Report Reference A:</b> no value                              |  |  |             |                    |          |          |          |  |
| <b>Report Reference B:</b> no value                              |  |  |             |                    |          |          |          |  |

**Summary** Pending

**Total (16,057.33 USD)**

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

|              |                  |
|--------------|------------------|
| Subtotal     | 16,057.33        |
| Shipping     | 0.00             |
| Handling     | 0.00             |
| <b>Total</b> | <b>16,057.33</b> |

**What's next?**

Workflow

- Submitted  
10/29/2024 12:37 PM  
Submitted - 10/29/2024 12:37 PM - Ganifer Hartfield  
On behalf of: Margaret Depue
- Budget Check  
Completed
- 21-Final Dept Approver  
Approved - 10/29/2024 2:00 PM - Abbie Harper
- Budget Check 2  
Completed

Verify that the purchase/payment request is within disbursement guidelines and allocated to the appropriate account(s).

**Accounting Codes** ...

| Fiscal Year | Member ID                               | Department Code                   | Account Code                                | Report Reference C | Report Reference D | Object Code                       | Class Code | Special Routing1  |
|-------------|---|-----------------------------------|---|--------------------|--------------------|-----------------------------------|------------|-------------------|
| 2025        | 21<br>Texas A&M University-<br>Commerce | 21-ALUM-FDN<br>21-Foundation Alum | 21-488312-20306<br>Alumni Brick Garden Fund | no value           | no value           | 5670<br>Other Contracted Services | no value   | L<br>Account Code |

**Internal Notes and Attachments** ...

Internal Note: no value

| Internal Attachments  | Date       |
|---|------------|
| <a href="#">Vendor_Verify_Oak Grove Landscape &amp; Irr_20241010T110...</a> | 10/10/2024 |
| <a href="#">Alumni_Oak Grove Landscape &amp; Irrigation LLC_inv_2274...</a> | 10/10/2024 |

**External Notes and Attachments** ...

Note to all Suppliers: no value

Attachments for all suppliers:

PO Clauses: 6 [View details](#)

**1 Item** ...

**OAK GROVE LANDSCAPE & IRRIGATION, LLC** · 1 Item · 500.00 USD

**SUPPLIER DETAILS**

Contract Number: no value      PO Number: [AB0965995](#)

Pricing Code: no value      Quote number: no value

| Status | Item   | Catalog No. | Size/Packaging | Unit Price | Quantity | Ext. Price |
|--------|--|-------------|----------------|------------|----------|------------|
| 1      | <input checked="" type="checkbox"/> <a href="#">Removal of 24 existing blank pavers and installation of 24 etched pavers</a> | n/a         | EA             | 500.00     | 1EA      | 500.00     |

**ITEM DETAILS**

Contract: no value      Internal Note: no value

Commodity Code: 72151911 / Unit paver installation service | 5670      Internal Attachments

External Note: no value

Attachments for supplier

- Does the requisition have a vendor verify attached?
- Is there a quote attached?
- Invoices do not count as a quote.

If all is good, 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.

# 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