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.
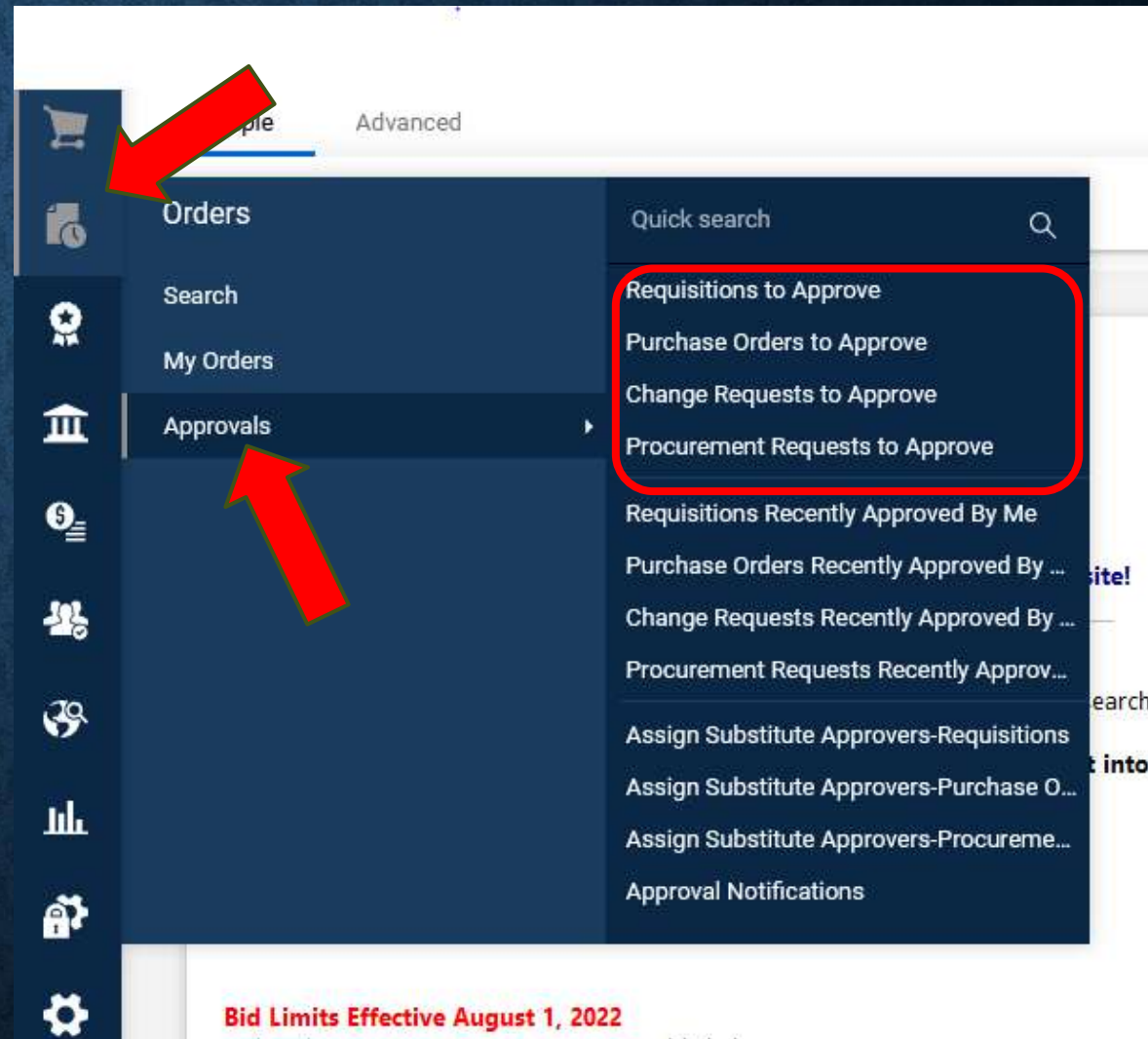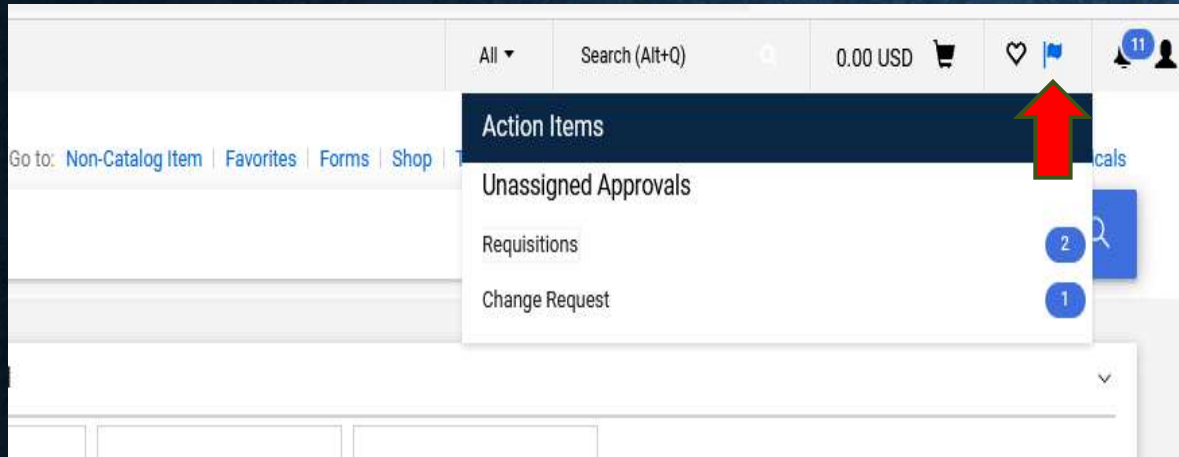
    a. My Assigned Approvals

        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)

The requistion will look like

Click here to assign to yourself

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 Texas A&M University-Commerce	21-ALUM-FDN 21-Foundation Alum	21-488312-20306 Alumni Brick Garden Fund	no value	no value	5670 Other Contracted Services	no value	L Account Code

Internal Notes and Attachments

Internal Note	no value	
Internal Attachments		Date
↓ Vendor_Verify_Oak Grove Landscape & Irr_20241010T110...		10/10/2024
↓ Alumni_Oak Grove Landscape & Irrigation LLC_Inv_2274...		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 ✓	Removal of 24 existing blank pavers and instillation of 24 etched pavers	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 requistion 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