

Approver Guide

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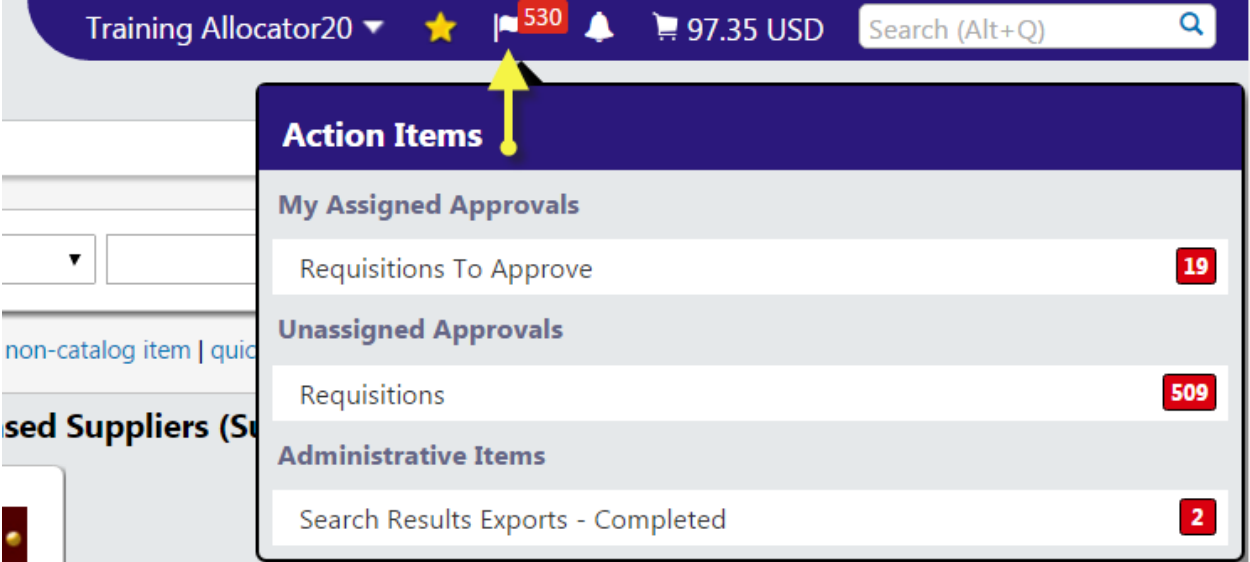
What are my responsibilities as the Department Approver?

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.

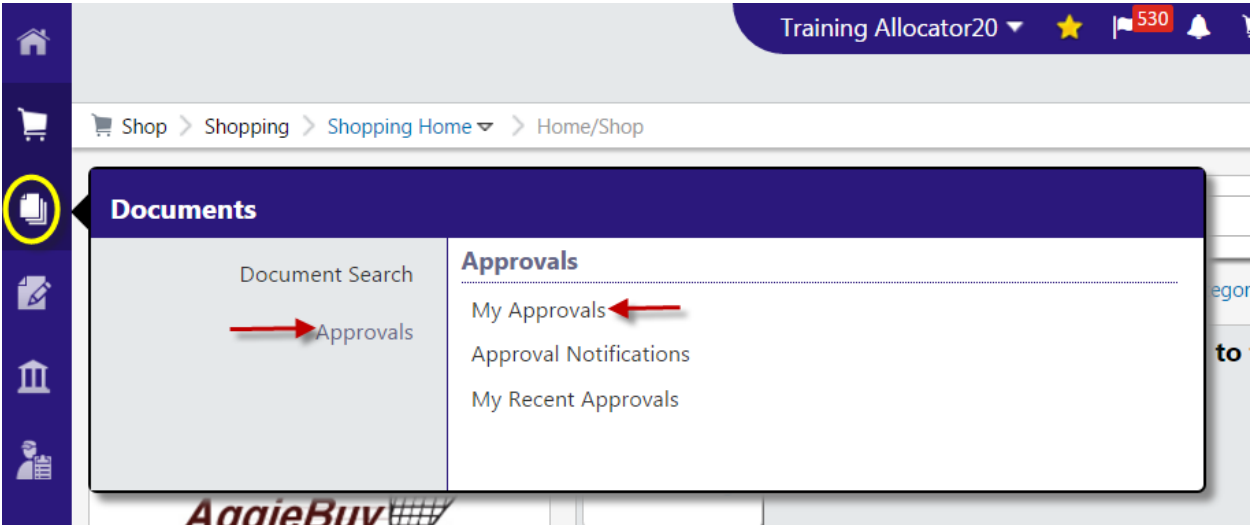
How do I locate documents that I need to approve?

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

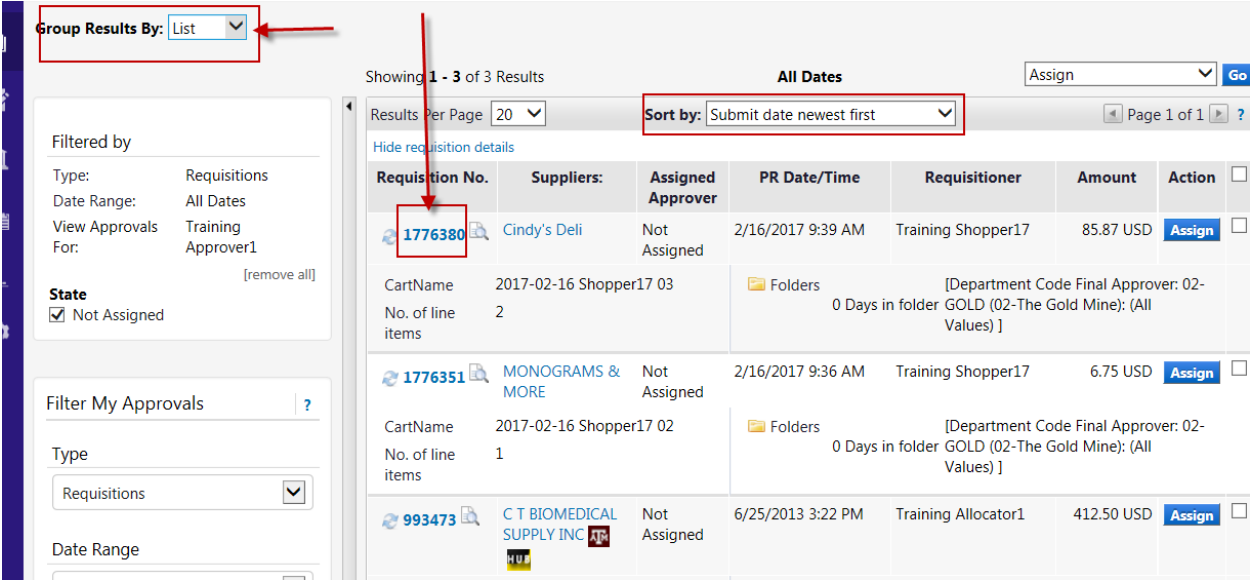


Note: If an invoice is awaiting approval it will appear just below the Requisitions

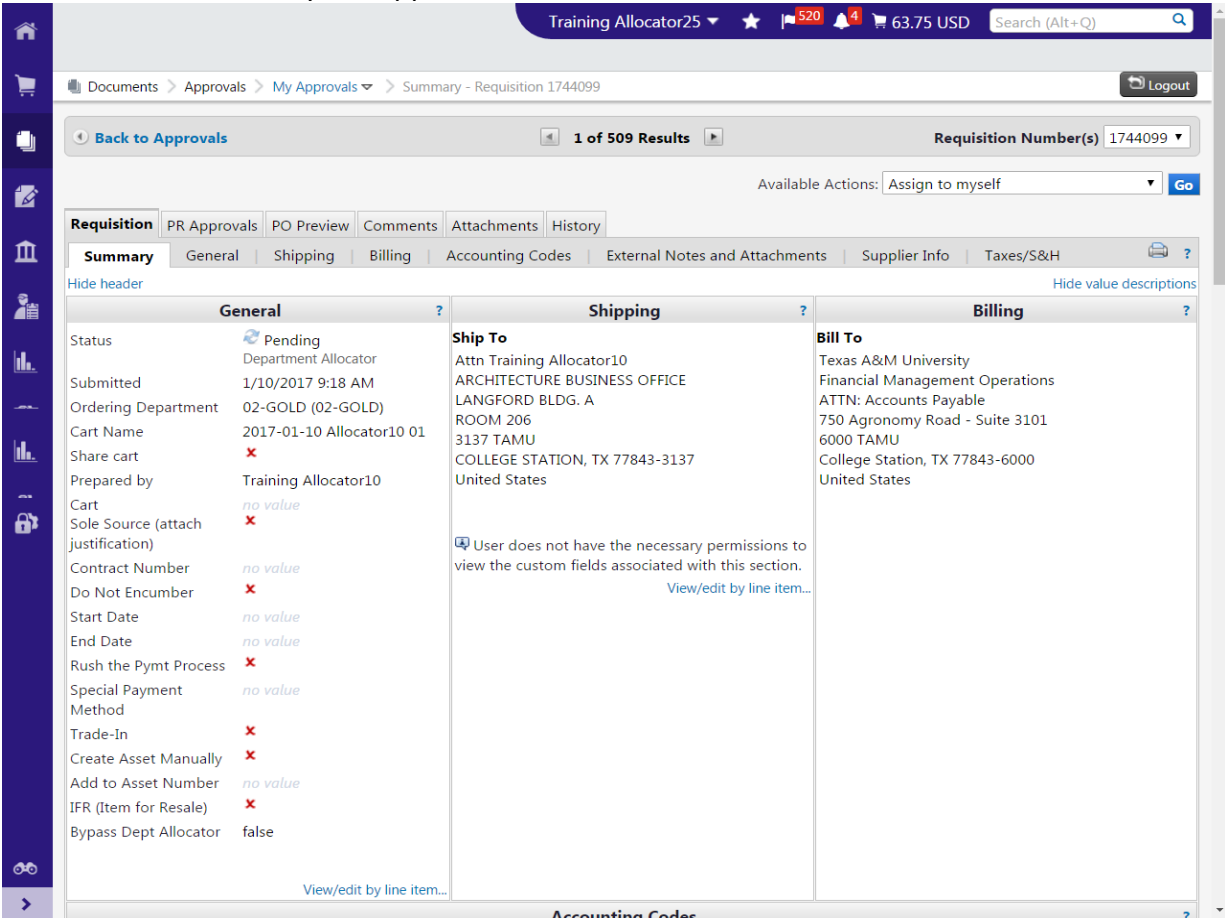
Action Items	
My Assigned Approvals	
Requisitions To Approve	1
Unassigned Approvals	
Requisitions	2
Invoices	1

Approving Documents

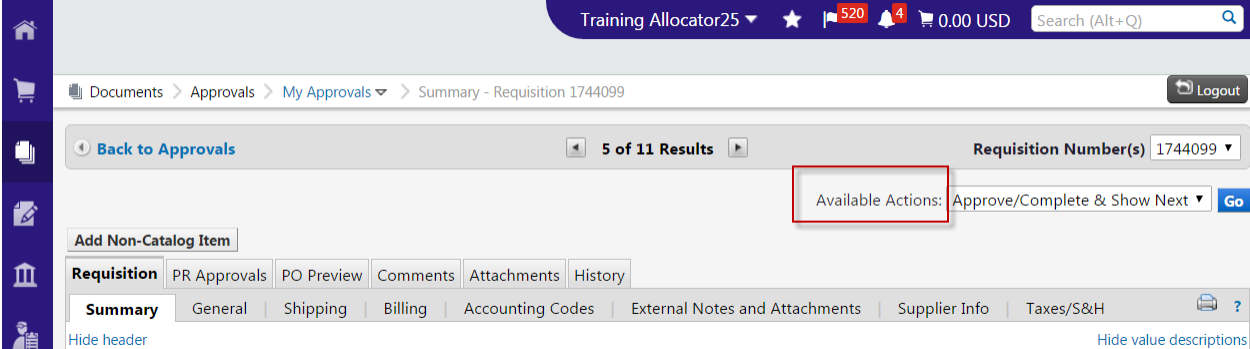
To review the document for approval simply select the document number. Note: The approver can view results as a list or by folder. If folder is selected it will show each folder and the user can then select the document number from each folder. The list view will show them all in the sort by order. It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



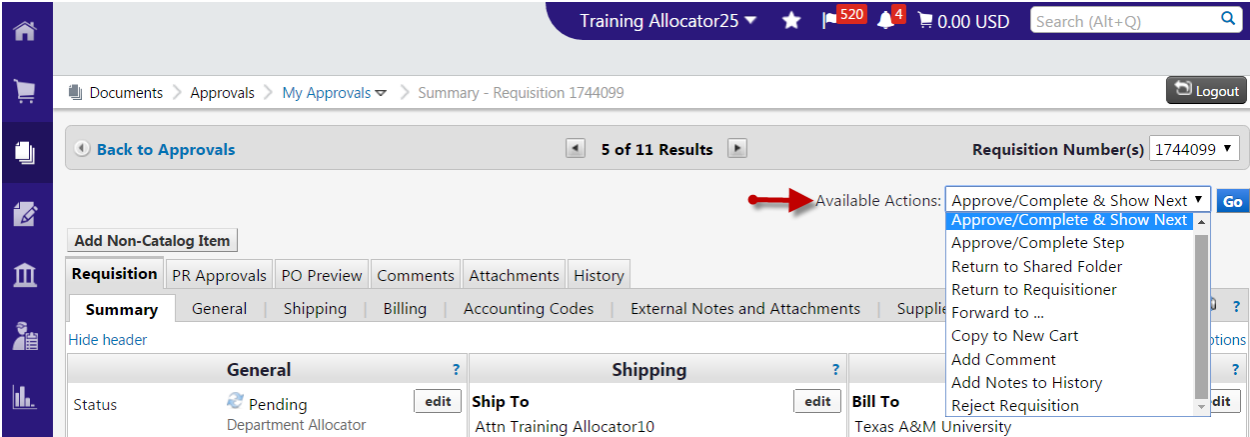
The document summary will appear as shown below.



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/Complete & Show Next from the Available Actions drop down and click “Go”. 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)
5. Forward to
 - a. You forward the document to another user to review

- b. ***If the other user has turned off notifications then they will not know this has been sent to them so you may need to let the other user know that they need to approve the document
- 6. Copy to New Cart
 - a. Creates a new requisition exactly like the document you are reviewing
- 7. Add Comment
 - a. Add a note or send a comment to another user
- 8. Add Notes to History
 - a. Adds a note to the history tab of the document
 - b. This is basically the same thing as adding a comment only you do not have the ability to send the note to a user
- 9. 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

The screenshot shows the FAMIS interface for a Requisition. The breadcrumb trail is: Documents > Document Search > Search Documents > Summary > Requisition 83556132. The requisition number '83556132' is circled in red. The user is logged in as Cindy Glover. The available actions include 'Copy to New Cart' and 'Go'.

The screenshot shows screen 295 in FAMIS. The header displays '295 SciQuest Document Xref' and the date/time '01/29/17 12:15PM'. The 'SciQuest Document ID' field contains '83556132', which is highlighted with a yellow arrow. Below this is a table with columns 'S Document', 'SciQuest Doc ID', and 'Doc Description / Error'. The first row shows '81101AF' circled in yellow, with '83556132' in the second column and '2017-01-19 Tejas-EAI dredge' in the third column.

Purchase Order

The screenshot shows the FAMIS interface for a Purchase Order. The breadcrumb trail is: Documents > Document Search > Search Documents > Status - PO AB0300343. The PO/Reference No. is 'AB0300343 Revision 0', which is circled in red. The supplier is 'TEXAS OFFICE PRODUCTS INC'. The available actions include 'Add Comment' and 'Go'.

The screenshot shows screen 295 in FAMIS for a Purchase Order. The header displays '295 SciQuest Document Xref' and the date/time '01/29/17 12:25PM'. The 'SciQuest Document ID' field contains 'AB0300343', which is highlighted with a yellow arrow. Below this is a table with columns 'S Document', 'SciQuest Doc ID', and 'Doc Description / Error'. The first row shows '570020A' circled in yellow, with 'AB0300343' in the second column and '2017-01-19 Tejas-EAI dredge' in the third column.

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

The screenshot shows the FAMIS interface for a Buyer Invoice. The breadcrumb trail is: Accounts Payable > Invoices and Receipts > Search for Invoices > Summary - Supplier Invoice No. 01031702004922 (Doc. 6.45616416). The invoice number '45616416' is circled in red. The supplier name is 'CITIBANK TAMU TC'. The available actions include 'Mark as In Process' and 'Go'.

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)

S	Ref	Voucher	Ln	Vendor Name	Stat	Net Amount	Description
-	5616416	6659217	1	CITIBANK TAMU DC	PAID	23,329.18	TAMU (02) CI
-	56182	6659216	1	CDW GOVERNMENT INC	PAID	150.54	DISPLAY 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	27002027	2012-02-21RMEHiltonInvoice45824-2 13 12

Cindy Glover ▾ All ▾ 83560050 🔍

Quick Search Alt + Q

Document

- 83560050 - Requisitions
- AB0300349 - Purchase Orders

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: █ Voucher: 6659217 Fiscal Year: 2017

Status: PAID
 Hold: N Pend: N
 Encl: Wire: N
 Vendor: 14603503606 CITIBANK TAMU DC
 Alt Vndr: Desc: TAMU (02) CITIBANK MONTHL St Vchr: N
 Due Dt: 01/25/2017 Cust AR Nbr: Revolv: N
 Inv Dt: 01/03/2017 GSC Ord: Chg Src: N
 Divry Dt: 01/03/2017 Cont Wk Force: N Confidential: ACH: Y Ovr: N
 Dept Ref: 5616416 FAMIS Trace: B330457 St Warrant Nbr:
 Tran Cd: 140 ACH Dt: 01/25/2017 Warrant Dt:
 St Req Nbr: Check Recon: USAS Doc Type: PCC:
 Vchr Total: 23329.18 Reason: Orig Dist Dt:
 Bank Trace: 091000013063117 IC: PO No. Invoice Number Bank Dp Vd XRef

S Itm	Account	Net Amount	PO No.	Invoice Number	Bank	Dp	Vd	XRef
1	011170 00000 1615	23,329.18		01031702004922	06000	N	N	

Cindy Glover ▾

All ▾

01031702004922



Quick Search

Alt + Q

Document

45616416 Invoices



Document Search