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”.

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

![Requisition Screenshot]

Purchase Order

![Purchase Order Screenshot]

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

![Non PO based invoices Screenshot]
<table>
<thead>
<tr>
<th>S. Ref</th>
<th>Voucher Lns</th>
<th>Vendor Name</th>
<th>Stat</th>
<th>Net Amount</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>5616416</td>
<td>6659217</td>
<td>CITIBANK TAMU DC</td>
<td>PAID</td>
<td>23,329.18</td>
<td>TAMU (02) CI</td>
</tr>
<tr>
<td>FS188</td>
<td>6659216</td>
<td>CPW GOVERNMENT INC</td>
<td>PAID</td>
<td>150.54</td>
<td>DISPLAY MONO</td>
</tr>
</tbody>
</table>
How to Locate FAMIS Documents in AggieBuy

Requisition or Purchase Order

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

Non PO based invoice

Find the supplier invoice number from the voucher