



Purchasing Training

May 16, 2024

Procurement Services

<http://purchasing.tamu.edu/>

979-845-4570

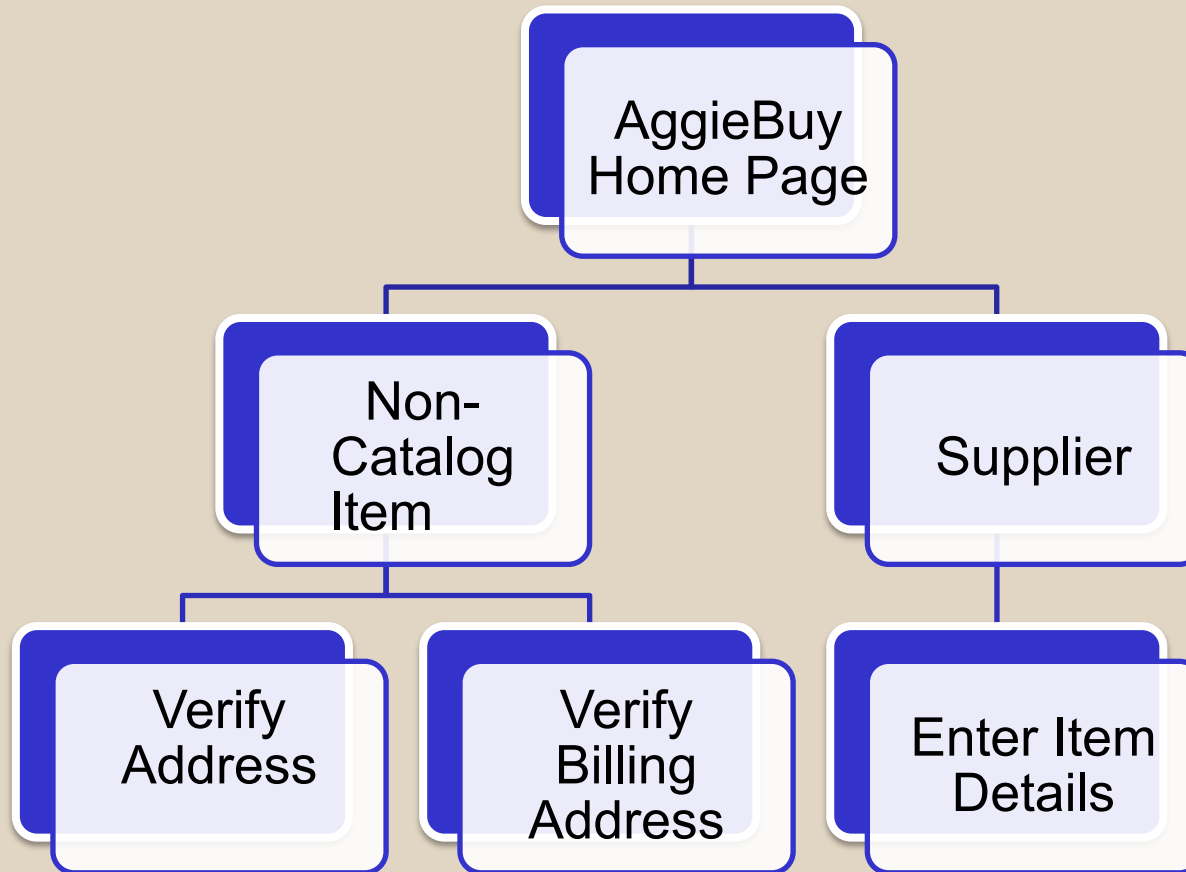
AggieBuy Requisition Overview

What is a requisition?

A requisition is a request submitted within AggieBuy that provides details of the product(s) and/or service(s) you wish to purchase. The requisition will detail the accounting information, ship to and bill to as well as the description of the product and/or service.

A requisition is the means to communicate with Procurement Services.

AggieBuy Requisition Overview



AggieBuy Requisition

solutions.sciquest.com/apps/Router/Home?tmstamp=1715756832793


TAMUSA Directory TAMU Directory TAMUSA Contracts TAMUS SSO : Logon Brian's Apt Ins Substitute-W9-2022... Box - Insurance Co...

ATM TEXAS A&M UNIVERSITY All

Simple Advanced

Go to: [Non-Catalog Item](#) | [Favorites](#) | [Forms](#) | [Shop](#)

Search for products, suppliers, forms, part number, etc.



Welcome to
Texas A&M University's Purchasing and e-Commerce Website!

Showcased Suppliers (Suppliers recently added to the MarketPlace)

WorkQuest



AggieBuy Requisition

Add Non-Catalog Item



Existing Supplier

Suggested Supplier



Suggested Supplier



Distribution Methods



Item 5 items have been found containing 'K702' in their Catalog No. [View all in search results](#)



Product Description ★

Catalog No. ★

Quantity ★

Price Estimate

Packaging

Item Description

K702

10

500.00

USD

EA - Each



238 characters remaining

Additional Details



★ Required fields

Save

Save And Add Another

Close



AggieBuy Requisition

Simple **Advanced** ...

Search for products, suppliers, forms, part number, etc.

Business Unit	02-Texas A&M University (02)	Pre-Pay & Add	<input type="checkbox"/>	Do Not Encumber	<input type="checkbox"/>
Cart Name	<input type="text" value="Training TAMUSA - Furniture"/>	Emergency (attach justification)	<input type="checkbox"/>	Rush the Pymt Process	<input type="checkbox"/>
Share cart	No user groups available	Sole Source (attach justification)	<input type="checkbox"/>	Special Payment Method	<input type="text"/>
Prepared by	Patricia Winkler	HSP-PAR Required	<input type="checkbox"/>	Cost Receipt Required	<input type="checkbox"/>
Prepared for	<input type="text" value="Patricia Winkler"/> <input type="button" value="Search"/>	Contract Number	<input type="text"/>	IFR (Item for Resale)	<input type="checkbox"/>
Cart Description/Purpose	<input type="text"/>	Start Date	<input type="text"/>	Trade-In	<input type="checkbox"/>
Software and/or Cloud Services (attach IT Review Form)	<input type="checkbox"/>	End Date	<input type="text"/>	Create Asset Manually	<input type="checkbox"/>
Order Category	<input type="text" value="1 - Regular"/> <input type="button" value="Dropdown"/>			Add to Asset Number	<input type="text"/>
Report Reference A	<input type="text"/>				
Report Reference B	<input type="text"/>				



AggieBuy Commodity Code

505 Items

Suggested Supplier · 505 Items · 502,500.00 USD

^ SUPPLIER DETAILS

Contract Number *no value* PO Number To Be Assigned
Pricing Code Quote number

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1 Item Description	NA	EA	1,000.00	<input type="text" value="500"/> EA	500,000.00	<input type="checkbox"/>

^ ITEM DETAILS

Contract: [Select price or contract...](#)

Internal Note
1000 characters remaining [expand](#) | [clear](#)

External Note
1000 characters remaining [expand](#) | [clear](#)

2 2nd item	slk	EA	500.00	<input type="text" value="5"/> EA	2,500.00	<input type="checkbox"/>
----------------------------	-----	----	--------	-----------------------------------	----------	--------------------------

^ ITEM DETAILS

Contract: [Select price or contract...](#)

Internal Note
1000 characters remaining [expand](#) | [clear](#)



AggieBuy Requisition

Suggested Supplier · 505 Items · 502,500.00 USD

SUPPLIER DETAILS

Contract Number *no value*

PO Number To Be Assigned

Pricing Code

Quote number

If you need to add additional non-catalog items; click on the three dots, then select **Add Non-Catalog Item**

Summary

- Add Discount
- Add Non-Catalog Item
- Add Trade-In

budget checking, a

- Subtotal ★
- Shipping
- Handling
- Total ★

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
Item Description	NA	EA	1,000.00	500 EA	500,000.00

ITEM DETAILS

Contract: [Select price or contract...](#)

Internal Note

1000 characters remaining

[expand](#) | [clear](#)

AggieBuy Requisitions

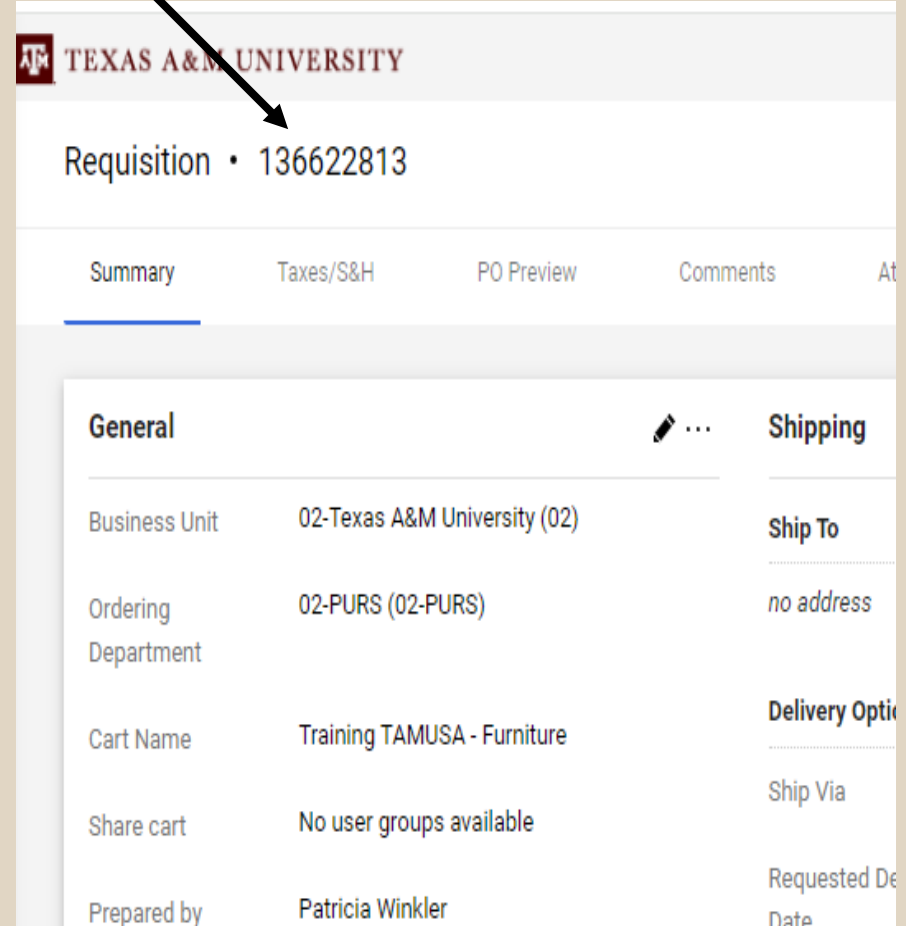
- Once you have added all your items select “Proceed to Checkout”

The screenshot shows the top navigation bar of the AggieBuy interface. It includes a search bar with the text "Search (Alt+Q)", a price display of "502,500.00 USD" with a shopping cart icon, a heart icon, and two notification icons with counts "189" and "232". Below the navigation bar, there are icons for eye, printer, and a menu, followed by a blue button labeled "Proceed To Checkout". The main content area shows a "Summary" section with a search icon and a right arrow. Below this is a "Details" section with a right arrow. The "Total (502,500.00 USD)" is displayed with a dropdown arrow. A note states: "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." The summary table shows:

Subtotal ★	502,500.00
Shipping	0.00

AggieBuy Requisition


- A requisition number has been assigned and it is in “Draft” form.
- The requisition can still be edited until you “submit”.



TEXAS A&M UNIVERSITY

Requisition • 136622813

Summary Taxes/S&H PO Preview Comments At

General  ... **Shipping**

Business Unit	02-Texas A&M University (02)	Ship To
Ordering Department	02-PURS (02-PURS)	<i>no address</i>
Cart Name	Training TAMUSA - Furniture	Delivery Optio
Share cart	No user groups available	Ship Via
Prepared by	Patricia Winkler	Requested De Date

AggieBuy Requisition

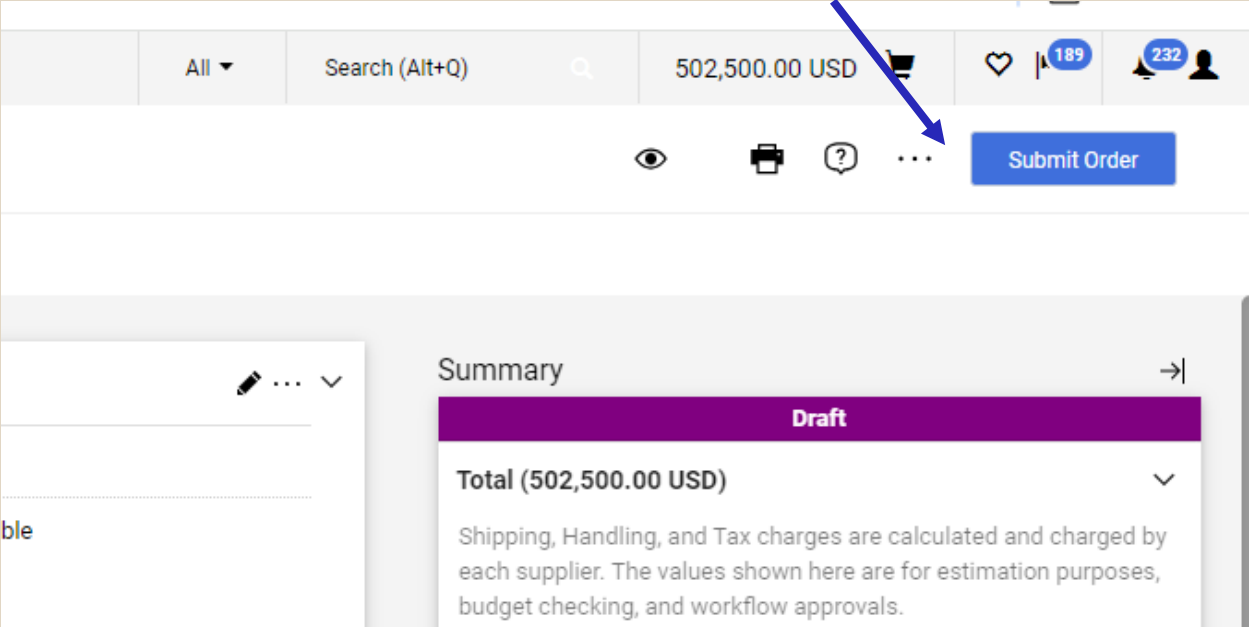
- Review all sections of the requisition
 - General Area
 - Shipping Area
 - Billing Area
 - Accounting Codes
- Internal Notes & Attachments
 - Add all backup documentation for this request.
Example – sole source justification, vendor quote, formal contract, etc.
 - Only visible by TAMUSA

AggieBuy Requisition

- External Notes and Attachments
 - Add attachments that you want the vendor to see. Example – Vendor Quote, Scope of Work, Formal Contract, etc.
- Procurement Services will review all attachments and may make modifications as needed

AggieBuy Requisition

- Once you have your requisition complete, you are ready to “**Submit Order**”



The screenshot displays the AggieBuy requisition submission interface. At the top, there is a navigation bar with a search bar (containing 'Search (Alt+Q)'), a total amount of '502,500.00 USD', and icons for a shopping cart, a heart, and a notification bell (showing 232 notifications). Below the navigation bar, there is a row of icons: an eye, a printer, a question mark, and a three-dot menu. A blue arrow points from the three-dot menu icon to a blue 'Submit Order' button. Below the navigation bar, there is a 'Summary' section with a purple header labeled 'Draft'. The summary shows a 'Total (502,500.00 USD)' and a note: '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.'

AggieBuy Requisition

- Once you submit your requisition, it will enter the workflow.
- The path of the workflow depends on how your department is setup. Typical steps are Department Allocator, Approver Step and Final Signer.
- All requisitions will stop at the commodity Code Assigner step, where the commodity code assigned at the line item will be double checked for accuracy.

What's next for my order?

Next Step: Department Allocator

Approvers: Barzak, Paul Admin
Benford, Lewis
Harris, Leann
Marquart, Caileigh
Price, Mcavan
Salcido, Madalyn
Vazquez, Erica

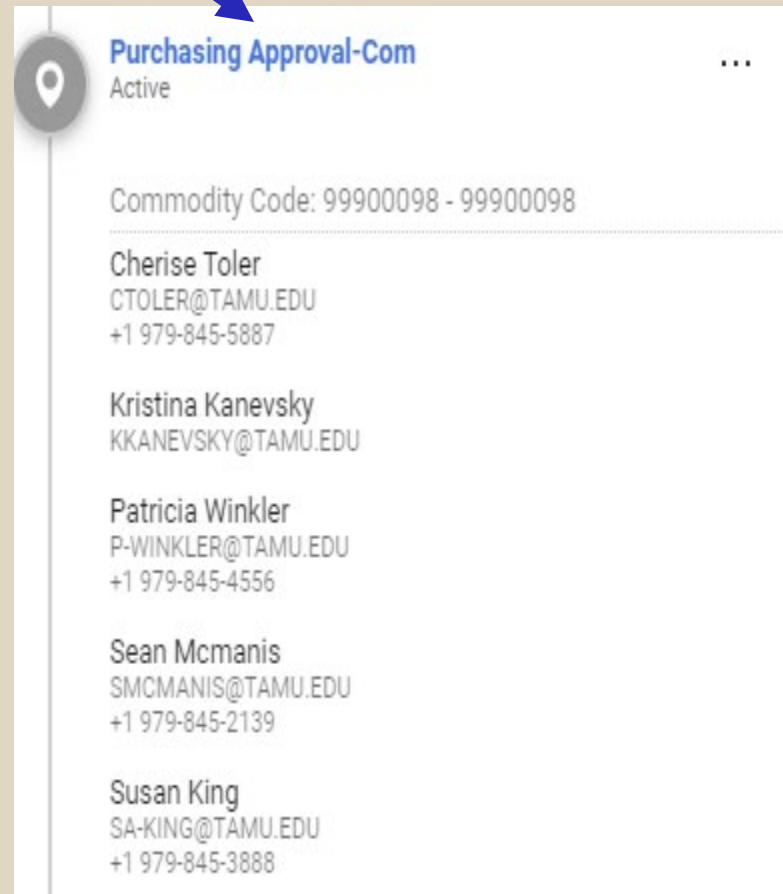
Workflow

- Draft**
Active
Patricia Winkler
- Department Allocator**
Future
- Commodity Code Assigner**
Future
- Budget Check**
Future
- Final Dept Approver Catch**
Future

AggieBuy Requisition

- Additional Steps to the workflow. Not all steps will be there for every requisition. It will depend on the commodity code assigned.
 - Specialized Approvals
 - Visual Compliance
 - Export Controls

Who's working this step?



A screenshot of a requisition card for 'Purchasing Approval-Com'. The card is white with a grey location pin icon on the left. The title 'Purchasing Approval-Com' is in blue, and 'Active' is in grey below it. A blue arrow points from the text 'Who's working this step?' to the title. Below the title, the commodity code '99900098 - 99900098' is displayed. A list of staff members follows, each with their name, email address, and phone number.

Commodity Code: 99900098 - 99900098

Cherise Toler
CTOLER@TAMU.EDU
+1 979-845-5887

Kristina Kanevsky
KKANEVSKY@TAMU.EDU

Patricia Winkler
P-WINKLER@TAMU.EDU
+1 979-845-4556

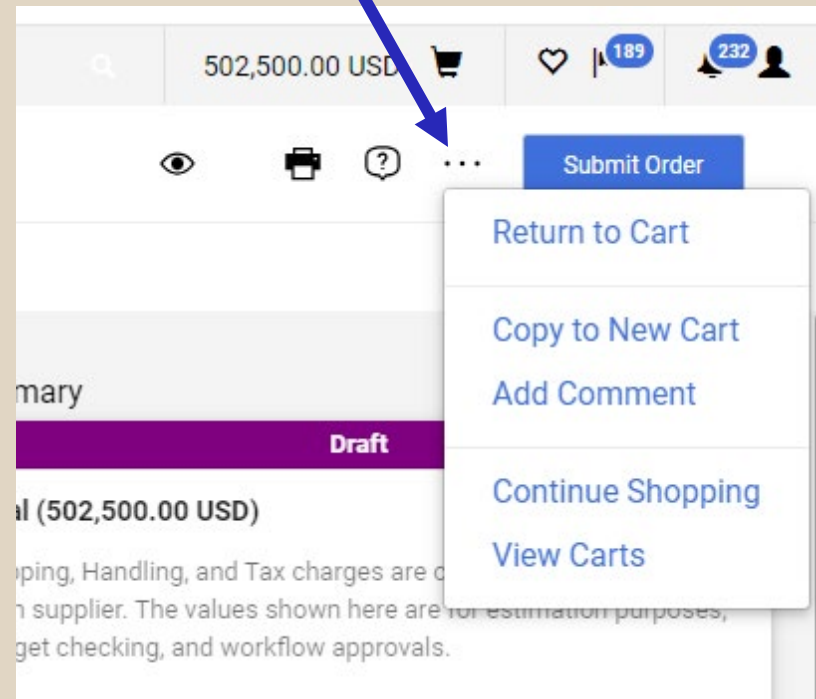
Sean Mcmanis
SMCMANIS@TAMU.EDU
+1 979-845-2139

Susan King
SA-KING@TAMU.EDU
+1 979-845-3888

AggieBuy Requisition

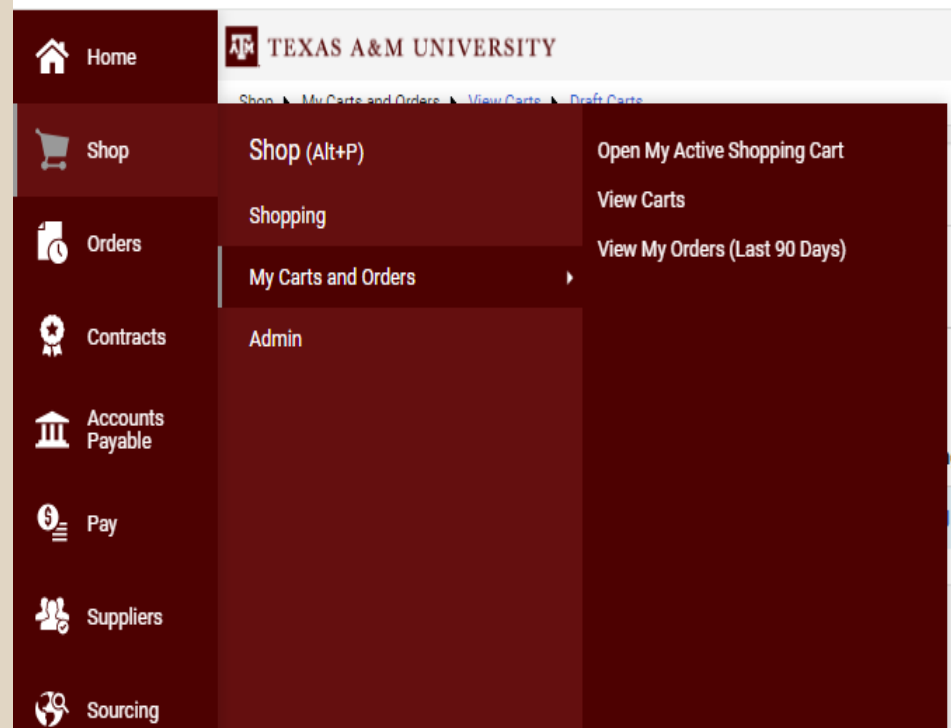
Additional Actions you can take on a “Draft” requisition.

- Return to Cart
- Copy to New Cart
- Add Comment
- Continue Shopping
- View Carts



AggieBuy Requisitions

- How to view your “draft” carts and requisitions
 - Shop
 - My Carts and Orders
 - View Carts



Cart Management [Create Cart](#) ?

[Draft Carts](#) [Assigned Carts](#)

[Filter Draft Carts](#)

Type ^	Cart Number ^	Shopping Cart Name ^	Cart Description	Date Created ^	Total ^	Action
Normal	136622813 Active	Training TAMUSA - Furniture		10/5/2020	502,500.00 USD	View ▼

AggieBuy Supplier On Boarding

- Supplier Search – if your vendor is not in the system. You can now send a request directly to the vendor from AggieBuy.
- Search under the “Suppliers” tab
- Search for Supplier

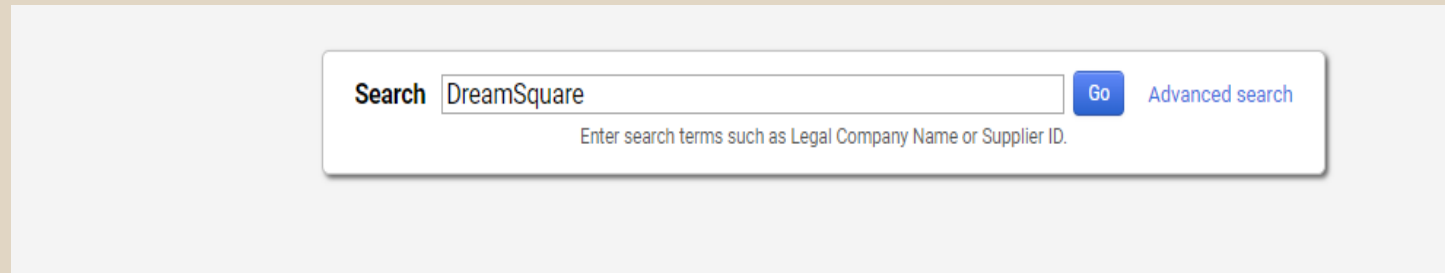
The screenshot displays the AggieBuy system interface. On the left is a dark red navigation sidebar with icons and labels for: Accounts Payable, Pay, Suppliers, Sourcing, Reporting, and Administer. The main content area shows a table with the following data:

Business Unit	02-Texas A&M University (02)	Ship To
Ordering Department	02-PURS (02-PURS)	no address

Below the table, the 'Suppliers' menu is expanded, showing a search bar with the placeholder text 'Type to Search Suppliers...' and a magnifying glass icon. The menu items listed are: Manage Suppliers (with a sub-menu arrow pointing to 'Supplier Management Home'), Approvals, Requests, Import/Export, Search for a Supplier, View Saved Searches, Add Suppliers, and Manage Supplier Groups.

AggieBuy Requisitions

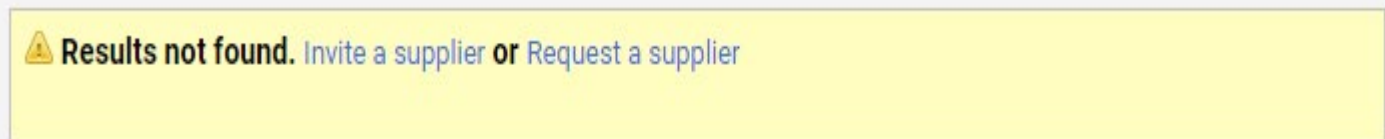
- In the “Search” box, type your Vendor name, hit “Go”




Search [Go](#) [Advanced search](#)

Enter search terms such as Legal Company Name or Supplier ID.

- AggieBuy will return a profile listing for the vendor or a message of “Results Not Found”



 Results not found. [Invite a supplier](#) or [Request a supplier](#)

AggieBuy Supplier On Boarding

- Select “Invite Supplier”
- Registration Type will be “Award Profile”
- Provide Supplier Name and Email
- Click “Invite Supplier to Register

Add Supplier ×

Registration Type [★]

Supplier Name [★]

Supplier Number

DUNS

First Name

Last Name

Email Address [★]

Confirm Email Address [★]

Comment

800 characters remaining
Please make sure Invitation Comment place holder is set up in email setting

[★] Required



AggieBuy Supplier On Boarding

- If there is a duplicate found, you will receive this message

Duplicate Supplier Found

⚠ Is the supplier you'd like to invite displayed below? We may already have them in our network. If so, check the supplier for available actions.

Supplier Information

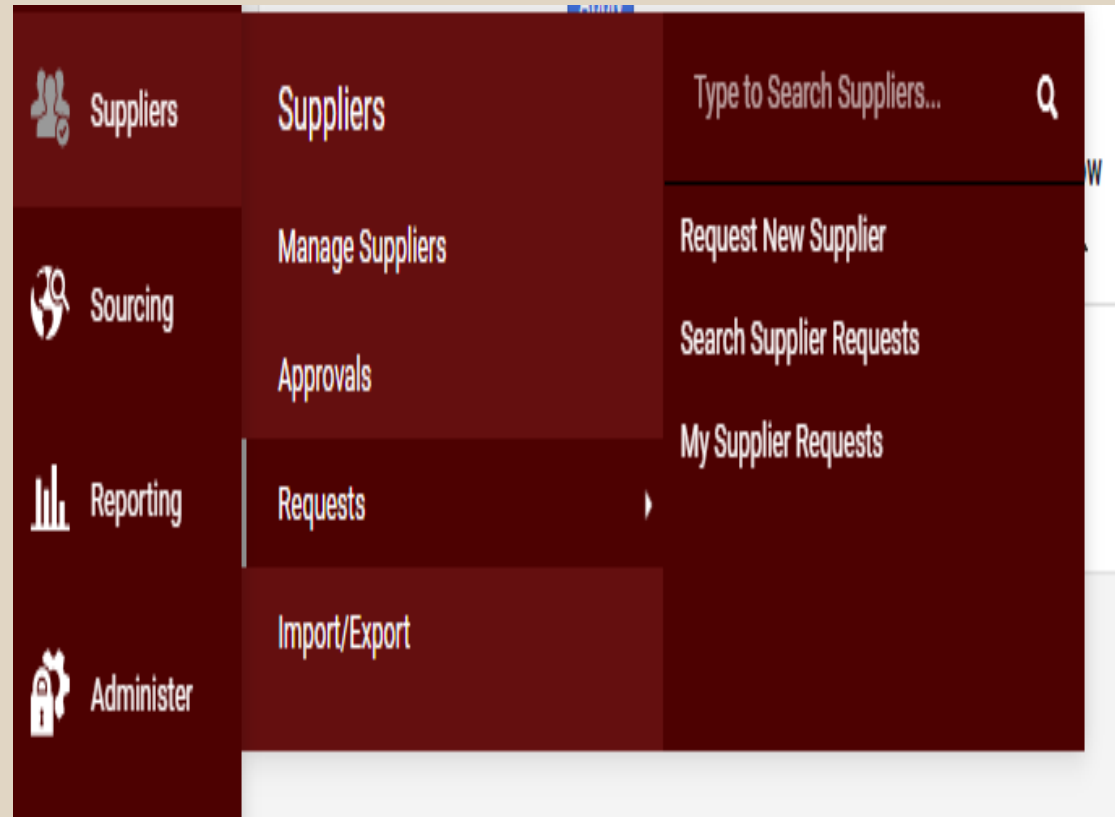
Supplier Name **Winkler**
First Name -
Last Name -
Email Address **winklerjp89@gmail.com**
Registration Type **Award Profile**

Potential Matches

Legal Company Name	Registration Status	Primary Contact Email	Matched On	Actions
Winkler, Edward	None	hans500sl@yahoo.com	Legal Company Name: Winkler, Edward Doing Business As (DBA): Edward Winkler	Invite Existing Supplier
WINKLER KURTIS	None		Legal Company Name: WINKLER KURTIS	Invite Existing Supplier
Winkler Structures	None	abe.neufeld@winklerstructures.com	Legal Company Name: Winkler Structures	Invite Existing Supplier
WINKLER IVAN	None		Legal Company Name: WINKLER IVAN	Invite Existing Supplier
WINKLER SAMANTHA	None		Legal Company Name: WINKLER SAMANTHA	Invite Existing Supplier
WINKLER MELISSA	None		Legal Company Name: WINKLER MELISSA	Invite Existing Supplier
WINKLER KATHLEEN	None		Legal Company Name: WINKLER KATHLEEN	Invite Existing Supplier
WINKLER WADE	None		Legal Company Name: WINKLER WADE	Invite Existing Supplier

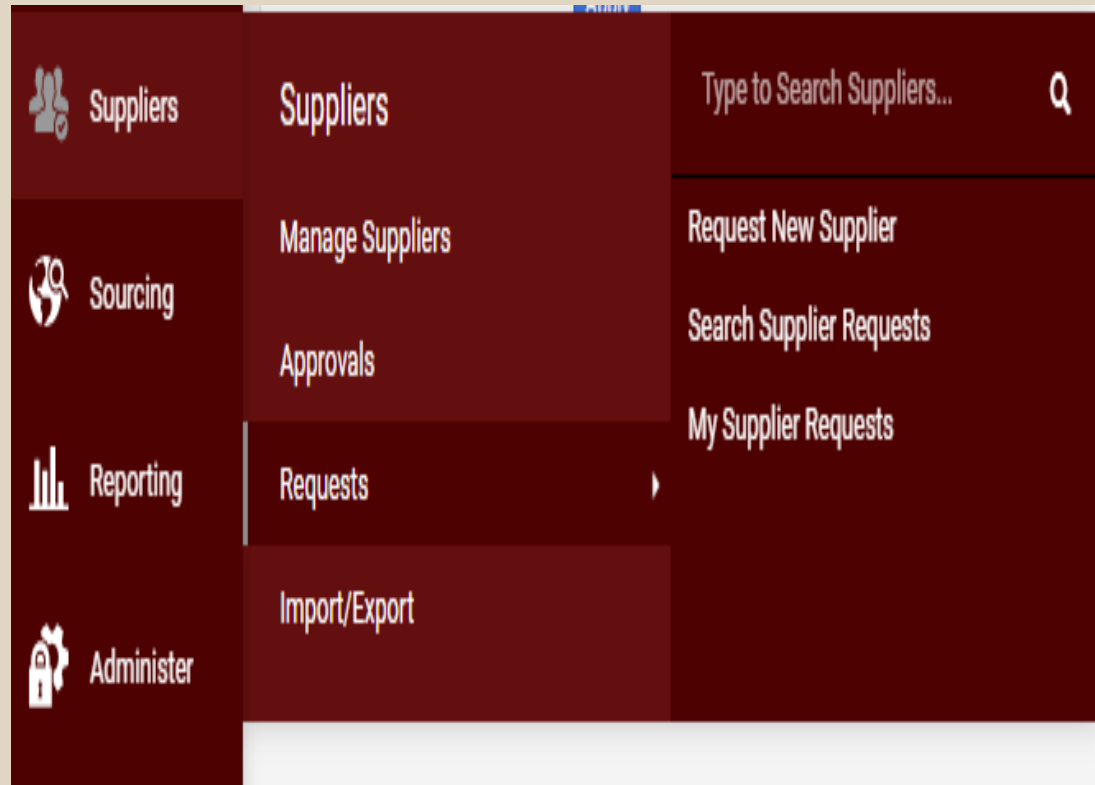
AggieBuy Supplier On Boarding

- Additional way to request a new supplier
- Suppliers
 - Request
 - Request New Supplier



AggieBuy Supplier On Boarding

- Check status of your Supplier Request
 - Suppliers
 - Requests
 - My Supplier Request





AggieBuy Supplier On Boarding

My Supplier Requests



Filter Supplier Requests

Requested Supplier, Template Name



Request Status *

Approved

Incomplete

Rejected

Returned

Under Review

Completed

Include public Supplier
request form?

Apply

Requested Supplier [△]	Template [△]	Request Status [△]	Workflow Step [△]	Workflow Assignee	Status Last Updated [▼]	Created [△]	Supplier Profile	Registration Status	
Big Data Energy Services	Supplier Onboarding Request	Incomplete	-	-	5/16/2024 8:24 AM	5/16/2024 8:24 AM		-	Actions [▼]



AggieBuy Supplier On Boarding

Search Supplier Requests

Save As Pin Filters Export All

Quick Filters My Searches

Created Date: Last 90 days Quick search Add Filter Clear All Filters

Page 1 of 67 1-20 of 1338 Results

20 Per Page

Approved By

Watson, Brandie 605

Marek, Candace 589

Johnson, Lisa 130

Johnson, Agnes 2

Bella, Carlos 1

See More Show More

Current Workflow Step

New Supplier Set-Up 11

Form Status

Approved 1119

Rejected 207

Under Review 11

Incomplete 1

<input type="checkbox"/>	Form Name	Request Number	Form Status	Created Date/Time	Template Name	Current Workflow Step	Pending Approver	Requestor	Submitted Date	Completed Date
<input type="checkbox"/>	Big Data Energy Services	12563587	Incomplete	5/16/2024 8:24:33 AM	Supplier Onboarding Request			Patricia Winkler		
<input type="checkbox"/>	Days Inn & Suites by Wyndham Galveston West/Seawall	12561027	Under Review	5/15/2024 7:22:03 PM	Supplier Onboarding Request	New Supplier Set-Up		Charlotte Tassin	5/15/2024 10:01:18 PM	
<input type="checkbox"/>	Damian Lall	12560246	Under Review	5/15/2024 5:34:13 PM	Supplier Onboarding Request	New Supplier Set-Up		Juana Esqueda Acero	5/15/2024 5:35:45 PM	
<input type="checkbox"/>	Laura Rea	12559490	Under Review	5/15/2024 4:43:31 PM	Supplier Onboarding Request	New Supplier Set-Up		Toni Merchant	5/15/2024 4:44:32 PM	
<input type="checkbox"/>	Istitut Catala de Nanociencia	12557212	Approved	5/15/2024 3:10:05 PM	Supplier Onboarding Request			Renee Campos	5/15/2024 3:11:50 PM	5/15/2024 3:43:34 PM
<input type="checkbox"/>	Cindy Ross	12556803	Approved	5/15/2024 2:50:39 PM	Supplier Onboarding Request			Rosa Warren	5/15/2024 2:51:35 PM	5/15/2024 3:42:24 PM

Questions!

Submit all topics for next months training to –
P-winkler@tamu.edu

Subject Line – TAMUSA Training Topics
