

# North Carolina A&T State University



## AGGIE-MART

### Quick Reference Guide

08/20/2012  
VERSION 5

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## REQUISITIONER QUICK GUIDE

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### I. Navigation Information

A. Navigation Tabs: These tabs are across the top of the application. The number of tabs available to each user is dependent on their permissions.

1. **Home/Shop** – is used for shopping, and provides quick access to other key parts of **AGGIE-MART** such as Favorites and Forms.
2. **Favorites** – is used to create and define shared and personal favorites folders and items. Items can be moved and copied between folders; current folders and items can be edited and removed. Favorite items can be added through search results and the checkout screens.
3. **Forms** – is used to create non-catalog or specific form orders for an item or service.
4. **Carts** – is used to view and modify the current shopping cart, create new carts and delete existing carts, and prepare the cart for processing (adding shipping, account information, etc.)
5. **History** – contains a repository of various documents within **AGGIE-MART**. Purchase requisitions, purchase orders, receipts, and invoices and all available for viewing, depending on the permissions granted to a requester.
6. **Settlement**- provides access to system receipts and invoices along with the ability to create new receipts and invoices, given the proper permissions.
7. **Profile**– is used to review and update personal user information ranging from time zone, assigned roles, approver information, email preferences, and more.

B. Purchasing Showcase – The Purchasing Showcase is used to highlight suppliers and forms recommended for use by requisitioners and shoppers. This is an optional feature of the system, and if not used, this area will be empty.

C. Navigation Sub-tabs. Beneath the top-level navigation are sub-tabs. As with navigation tabs, the sub tabs displayed depend on the permissions granted to the individual user. By clicking on these sub-tabs, the information in the screen below refreshes to display the specific topic or function covered in that particular part of **AGGIE-MART**.

D. Online Help. Online Help is accessed by clicking on the question mark anywhere in the application ( ) or by clicking on hyperlink text. Text with associated Help is indicated by text that changes colors when mousing-over the text. Much of the text in the application can be selected and a secondary Help window displays. For those organizations who have the feature enabled, hover help is enabled, which allows users to view help for a field when pausing at a field.

## II. Users and Roles

A user is any person that has access to **AGGIE-MART**. Each user is assigned a username and password to identify who they are, what their permissions are, and other specific information. Users are assigned specific roles, and roles are created to manage users with similar permissions.

- A. **Shopper:** is a person that can create a cart in **AGGIE-MART** but **does not** have access to the Banner Finance fund, but will assign the cart to a requisitioner to complete and validate the financial information. For example, the original shopper may select the items, but the cart assignee (requisitioner) is needed to enter the appropriate accounting codes.
- B. **Requisitioner:** is a person that can create a cart in **AGGIE-MART** and has access to the Banner Finance fund, and enter the appropriate accounting codes for submission to an approver.
- C. **Approver:** is a person that has been granted access to approve requisitions from a department level, area level, or functional level. This person is granting permission to allow the cart to be delivered to the vendor to fulfill the order.
- D. **Buyer:** is a person in the Purchasing Department that has authority to process a requisition based on university and state procurement policy and procedures.

## III. How To Log-Into AGGIE-MART:

1. **Go** to the North Carolina A&T State University Website.
2. **Go** to the Fac/Staff/Admin link
3. **Click** on the Business and Finance Link, *scroll* down and **Click** on **AGGIE-MART**
4. **Enter** the username and password provided by the **AGGIE-MART** System Administrator and **Click** on the sign in button.

## IV. How To Set-Up My Profile:

- A. **Setting up Banner Index (Fund) and Account Code Combinations:** This will allow you to set-up frequently used combination Banner Index and account codes. This is for **Requisitioners Only**.
  1. At the **AGGIE-MART** home page, **click** on the work “**Profile**” beside your name.
  2. **Click** on the “**Purchasing**” sub-tab, and **click** on “**Code Favorites.**”
  3. **Click** on the “**Add**” button.
  4. **Type** a “**nick name**” for the specific combination Example: Office Supplies.

5. **Tab** to “**Index**” and type in your Banner Index. Example: 170XXX.
6. **Tab** to “**Account**” and type in the finance account code that corresponds to the nick name. Example: 72601.
7. **Click** on the Save button. (*Note: To create additional combinations, repeat steps c through g.*)

**B. Setting up My Ship To:** This will allow you to set-up the ship to’s that you will need when ordering products/services. (*Note: Office Depot Orders are desk top delivery. Deliveries that require the building to have a lift or dock must go to Central receiving.*)

1. At the **AGGIE-MART** home page, **click** on the word “**Profile**” beside your name.
2. **Click** on the “**Purchasing**” sub-tab, and **click** on “**Addresses.**”
3. **Click** on “**Select Addresses for Profile.**”
4. **Click** on the down arrow and click on “**CENT**” (This is short for Central Receiving). (*Note: Most buildings have a nick name; use your AGGIE-MART training manual to identify the correct building nickname.*)
5. **Tab** to the “**Attn.**” box and type in your first and last name, / building name/office or suite number. Example: Jane Doe/Merrick Hall/#203.
6. **Click** on the Save button. (*Note: To create a Ship To for desk top deliveries “Office Depot”, repeat steps 3 through 4, select your building.*)

**C. Setting up My Cart Assignee:** If you are a Shopper/Requisitioner, this will allow you to set-up an individual(s) that you frequently send a cart to in order to create a requisition.

1. At the **AGGIE-MART** home page, **click** on the work “**Profile**” beside your name.
2. **Click** on the “**Purchasing**” sub-tab, and **click** on “**Cart Assignees.**”
3. **Click** on the “**Add Assignee**” button.
4. **Tab** to the last name box and type in the individual’s last name that will create your requisition. **Click** on the “**Search**” button.
5. **Click** on the “**Select**” button beside the name of the individual’s name. (*Note: If this is your preferred requisitioner, click in the “Preferred button.”*)

**V. How To Find A Supplier /Request A Supplier In AGGIE-MART:** This will allow you to search to find a supplier that has been set-up.

**A. If the supplier has a Banner Finance Vendor Number** (Example: 950XXXXXX)

1. At the **AGGIE-MART** home page, *scroll* down to the **Browse** area and *Click* on “supplier.”  
[Browse: suppliers](#) | [categories](#) | [contracts](#) | [chemicals](#)
2. *Click* on [+ Click to expand Search for Supplier Filter](#) and type in the supplier’s name. *Click* the Search button. (Note: *Ensure the Supplier Type is set to all, if not, click on the drop down arrow and select the word all.*) Be sure to check the supplier type: **Hosted Catalog:** , **Non-Catalog:** , **Punch-Out:**  this will tell you how to create the purchase request in **AGGIE-MART**.

**B. If the supplier is not in AGGIE-MART:** (Note: Always check Banner Finance first to see if the supplier has a Banner vendor number.)

1. At the **AGGIE-MART** home page, click on the “**Forms**” tab. *Find* the New Supplier/Modification Form under the Shared Folder.
2. *Click* on the **View Form** button.
3. *Type* the requested information on the form. (Note: *If the supplier has a Banner Finance number be sure to put the number on the form. Ensure that you provide a fax number or email address where the vendor can receive the purchase order.*)
4. After typing the requested information, *scroll* to the top of the page and at “**Available Actions**” *click* on the down arrow box, *select* “**Add and go to Cart**” and *click* the Go button.



(Note: *If it is a new supplier be sure to request a current W9 from the supplier and attach the document to the AGGIE-MART cart/requisition.*)

5. Complete the cart/requisition.

**VI. How to Shop and Create a Cart/Requisition for Products/Services:**

**A. Instructions for Simple Shopping:** When using this method, the user is shopping in a catalog that is set-up in the **AGGIE-MART** site.

1. At the **AGGIE-MART** home page, *scroll* down to the search box.



2. Type in a description of the product/service to purchase, (Example: flasks) and *click* the Go button. (Note: **AGGIE-MART** will retrieve all items with the word “flasks” in the description.)

3. After finding the product, go the quantity box and type in the quantity that you are purchasing, and click on **Add to Cart**.  
(*Note: You should immediately see in the upper right hand corner of the page that the selection has been added to your cart.*)
5. You may continue the search for other products/services by repeating steps 1 -2.
6. After filling your cart, Click on the Shopping Cart at the top right of **AGGIE-MART** to create a cart or a requisition.  [2011-08-23 mcwilli2 01 | 0 item\(s\), 0.00 USD](#)
7. (*Suggestion: To be able to find your cart later: Go to Cart Name and assign a specific name to the cart that differentiates this cart from others in the future. Click on the Save button.*)
8. *Click* on the **“Proceed to Check Out”** button.
9. *Click* on the **“Summary”** sub-tab.
10. *Click* on the **“Edit”** button across from **Ship To**. (Note: If you have set up your ship to addresses, *Click* on drop down arrow under **“select from your addresses.”** and select the correct shipping address.
11. If you have not set-up your **Ship To** addresses, *Click* on **“To choose a different address, [click here](#) “ and” [select from org addresses”](#)**
12. *Tab* to Address Text box and type in building name (Example: DeHuguley) and *Click* the Select button.
13. *Type* in the name of the person receiving the product/service, Building Name and Office Number. *Click Save* button.
14. *Click* on the **“Edit”** button across from **Required Delivered**. *Click* on the calendar, and select the date product/service needs to be delivered to you. (Note: This date cannot be before the current date).
15. **SHOPPERS ONLY**: *Click* on the **“Assign Cart”** button. *Click* on **“Search for an assignee.”** Type in the name of a requisitioner that has access to the Banner Fund that needs to be assigned to the requisition, and *Click* the Search button. (*Note: A requisitioner must have data access in Banner Finance to be able to use the fund in AGGIE-MART.*)  
  
Locate the name of the requisitioner and *Click* in the circle beside their name and *Click* on **“Choose Selected User.”** This will take you back to the **AGGIE-MART** cart.  
(Note: You may type a note to the requisitioner before you assign the cart.) *Click* the **“Assign”** button.
16. **REQUISITIONERS ONLY**: *Click* on the **“Edit”** button in the Accounting Codes box. Type in the Banner Fund and budget account line where the product/service will be charged.

*Click* the **Save** button. *Scroll* up the page and *Click* on the **Place Order** button. The requisition is complete.

**B. Instructions for Advanced Shopping:** This allows you to enter additional criteria to narrow down your shopping selection quickly. When using this method, the user is shopping in a catalog that is set-up in the **AGGIE-MART** site.

1. At the **AGGIE-MART** home page, Go to the *home/shop* tab or *Shop* sub-tab.

2. To the right of the word *Shop*, click on the down arrow.

[Shop](#)



A screenshot of a web interface showing a dropdown menu. The text 'Lab Supplies' is displayed in the dropdown box, and a small downward-pointing arrow is visible on the right side of the box.

3. Select the *product category* that best describes (Lab Supplies, Office Equipment, etc) from the drop-down box.

4. Enter the *keyword* or keywords you are searching for in the search box and *click* the Go button. (*Note: Keep in mind, the more information you enter, and the more specific your search will be.*)

5. After finding the product, go the quantity box and type in the quantity that you are purchasing, and click on *Add to Cart*.

(*Note: You should immediately see in the upper right hand corner of the page that the selection has been added to your cart.*)

6. You may continue the search for other products/services by repeating steps 4-5.

7. After filling your cart, click on the Shopping Cart at the top of **AGGIE-MART** to start the requisition process.



8. (*Suggestion: To be able to find your cart later: Go to Cart Name and assign a specific name to the cart that differentiates this cart from others in the future. Click on the Save button.*)

9. *Click* on the “*Proceed to Check Out*” button.

10. *Click* on the “*Summary*” sub-tab.

11. *Click* on the “*Edit*” button across from **Ship To**. (Note: If you have set up your ship to addresses, *Click* on drop down arrow under “**select from your addresses.**” and select the correct shipping address.

12. If you have not set-up your **Ship To** addresses, *Click* on “To choose a different address, [click here](#) “ and” [select from org addresses](#)”

13. *Tab* to Address Text box and type in building name (Example: DeHuguley) and *Click* the Select button.

14. **Type** in the name of the person receiving the product/service, Building Name and Office Number. **Click Save** button.
15. **Click** on the “**Edit**” button across from **Required Delivered**. **Click** on the calendar, and select the date product/service needs to be delivered to you. (Note: This date cannot be before the current date).
16. **FOR SHOPPERS ONLY**: **Click** on the “**Assign Cart**” button. **Click** on “**Search for an assignee.**” Type in the name of a requisitioner that has access to the Banner Fund that needs to be assigned to the requisition, and **Click** the Search button. (Note: A requisitioner must have data access in Banner Finance to be able to use the fund in AGGIE-MART.)

Locate the name of the requisitioner and **Click** in the circle beside their name and **Click** on “**Choose Selected User.**” This will take you back to the AGGIE-MART cart. (Note: You may type a note to the requisitioner before you assign the cart.) **Click** the “**Assign**” button.

17. **FOR REQUISITIONERS ONLY**: **Click** on the “**Edit**” button in the Accounting Codes box. Type in the Banner Fund and budget account line where the product/service will be charged. **Click** the **Save** button. **Scroll** up the page and **Click** on the **Place Order** button. The requisition is complete.

C. **Instructions for Punch-out Shopping**: When accessing a **Punch-Out** supplier via AGGIE-MART, the user is automatically authenticated to the supplier’s website, so the supplier’s website knows the user is from North Carolina A&T State University to show the appropriate products and pricing.

1. At the AGGIE-MART home page, click on the supplier’s icon you would like to visit

(Example: )

(Note: Clicking on the supplier’s icon will take you to the supplier’s website. Each supplier’s website is set-up different.)

2. Once within the **Punch-Out** catalog, use the appropriate search tools to find the products/services.
3. After finding the product/services, go the quantity box and type in the quantity that you are purchasing, and click on **Add to Cart**.  
(Note: Users have 40 minutes to shop on a punch-out site. A user can shop longer by clicking the **Reset Session Button**.)

Your SciQuest Session will expire in: 39:00

[Reset Session](#)

4. Once all products are found, check out of the **Punch-Out** site. The products in the **Punch-Out** shopping cart are returned to the AGGIE-MART shopping cart

 2011-08-23 mcwilli2 01 | 0 item(s), 0.00 USD

**(Note: An order is NOT being placed with the supplier when checking out of their Punch-Out site. The purchasing process continues once returned to AGGIE-MART.)**

**(Note: To get out of a Punch-out site without checking out, click on the Cancel Punch out button at the top of each supplier's website.)**

5. **Suggestion:** To be able to find your cart later: Go to **Cart Name** and assign a specific name to the cart that differentiates this cart from others in the future. **Click on the Save button.**
6. **Click** on the **“Proceed to Check Out”** button.
7. **Click** on the **“Summary”** sub-tab.
8. **Click** on the **“Edit”** button across from **Ship To**. (Note: If you have set up your ship to addresses, **Click** on drop down arrow under **“select from your addresses.”** and select the correct shipping address.
9. If you have not set-up your **Ship To** addresses, **Click** on **“To choose a different address, [click here](#) “ and” [select from org addresses”](#)**
10. **Tab** to Address Text box and type in building name (Example: DeHuguley) and **Click** the Select button.
11. **Type** in the name of the person receiving the product/service, Building Name and Office Number. **Click Save** button.
12. **Click** on the **“Edit”** button across from **Required Delivered**. **Click** on the calendar, and select the date product/service needs to be delivered to you. (Note: This date cannot be before the current date).
13. **SHOPPERS ONLY:** **Click** on the **“Assign Cart”** button. **Click** on **“Search for an assignee.”** Type in the name of a requisitioner that has access to the Banner Fund that needs to be assigned to the requisition, and **Click** the Search button. **(Note: A requisitioner must have data access in Banner Finance to be able to use the fund in AGGIE-MART.)**

Locate the name of the requisitioner and **Click** in the circle beside their name and **Click** on **“Choose Selected User.”** This will take you back to the AGGIE-MART cart.

**(Note: You may type a note to the requisitioner before you assign the cart.)** **Click** the **“Assign”** button.

14. **REQUISITIONERS ONLY:** **Click** on the **“Edit”** button in the Accounting Codes box. Type in the Banner Fund and budget account line where the product/service will be charged. **Click** the **Save** button. **Scroll** up the page and **Click** on the **Place Order** button. The requisition is complete.

**D. Instructions for Non-Catalog Item Shopping:** A user can request products/services that are not available in a hosted or punch-out catalog using this method. Non-catalog items should be entered when a requisitioner cannot find the item needed from hosted or punch-out catalogs.

1. At the **AGGIE-MART** home page, Scroll down to the Go to area and **Click** on non-catalog item:

Go to: [favorites](#) | [forms](#) | [non-catalog item](#) | [quick order](#)

2. At the “**Enter Supplier**” field, type in the supplier’s name and **click** on the name. (*Note: If the supplier is not in AGGIE-MART, type “New Supplier” and click on it.*)

**Enter Supplier**

3. In the “**Product Description**” field, **type** a description of the products/services being requested from the supplier.
4. Tab to the “**Catalog No.**” field, and type a product/service catalog number (if on the supplier’s quote) or a generic description (Example: Transportation).
5. Tab to the “**Quantity**” field and put in the amount being requested from the supplier. (*Note: Breakdown quantities by month, job, gallon, etc.*)
6. Tab to the “**Price Estimate**” field and type in the amount being requested from the supplier.
7. Tab to the “**Packaging**” field and select from the drop down arrow the correct, unit of measure.
8. Tab to the “**Commodity Code**” field, and click on the **magnifying glass** .
9. Tab to the “**Description contains...**” box and type in broad description of the product/service that you are requesting and **click** the search button. Once the product/service is found, **click** the **select** button.

Code starts with...						<input type="text"/>
Description contains...						tshirt
<input type="button" value="Search"/>						
fdc6f3e0-482e-4	NonCattItemComm				setCommodityCoc	
	tshirt	20	1	Code	asc	
Results per page		20	<b>Results 7</b>		Page	1 of 1
<a href="#">Code</a> ^			<a href="#">Description</a> ^			

<a href="#">53102601</a>	Boys pajamas or nightshirts or robes	<a href="#">select</a>
<a href="#">53102602</a>	Mens pajamas or nightshirts or robes	<a href="#">select</a>
<a href="#">53102603</a>	Girls pajamas or nightshirts or robes	<a href="#">select</a>
<a href="#">53102604</a>	Womens pajamas or nightshirts or robes	<a href="#">select</a>
<a href="#">53102605</a>	Infants pajamas or nightshirts or robes	<a href="#">select</a>
<a href="#">53103000</a>	Tshirts	<a href="#">select</a>
<a href="#">53103001</a>	Mens tshirts	<a href="#">select</a>

Results per page  Page  of 1

10. (Note: In the case of products, users need to specify whether the item(s) are radio active, hazardous material, etc.)
11. If adding no additional line items, **Click** the **Save** and **Close** button. If adding multiple line items, **Click** the **Save** and “**Add Another**” button.
12. (Suggestion: To be able to find your cart later: Go to Cart Name and assign a specific name to the cart that differentiates this cart from others in the future. **Click** on the **Save** button.
13. **Click** on the “**Proceed to Check Out**” button.
14. **Click** on the “**Summary**” sub-tab.
15. **Click** on the “**Edit**” button across from **Ship To**. (Note: If you have set up your ship to addresses, **Click** on drop down arrow under “**select from your addresses.**” and select the correct shipping address.
16. If you have not set-up your **Ship To** addresses, **Click** on “To choose a different address, [click here](#) “ and” [select from org addresses](#)”
17. **Tab** to Address Text box and type in building name (Example: DeHuguley) and **Click** the **Select** button.
18. **Type** in the name of the person receiving the product/service, Building Name and Office Number. **Click Save** button.
19. **Click** on the “**Edit**” button across from **Required Delivered**. **Click** on the calendar, and select the date product/service needs to be delivered to you. (Note: This date cannot be before the current date).

20. **FOR SHOPPERS ONLY:** *Click* on the “Assign Cart” button. *Click* on “**Search for an assignee.**” *Type* in the name of a requisitioner that has access to the Banner Fund that needs to be assigned to the requisition, and *Click* the Search button. (*Note: A requisitioner must have data access in Banner Finance to be able to use the fund in AGGIE-MART.*)

Locate the name of the requisitioner and *Click* in the circle beside their name and *Click* on “Choose Selected User.” This will take you back to the AGGIE-MART cart. (Note: You may type a note to the requisitioner before you assign the cart.) *Click* the “Assign” button.

21. **FOR REQUISITIONERS ONLY:** *Click* on the “Edit” button in the Accounting Codes box. *Type* in the Banner Fund and budget account line where the product/service will be charged. *Click* the Save button. *Scroll* up the page and *Click* on the Place Order button. The requisition is complete.

## VII. How To Attach Files To A Requisition:

Attachments allow users to attach files in various formats or links to websites to carts/requisitions. These attachments can be *internal* (only for university use) or *external* (documents/information sent on to supplier). Attachments can be added

### Header Level Attachment

Internal Notes and Attachments	External Notes and Attachments
<a href="#">Internal Note</a> <span style="float: right;"><i>no note</i></span> <a href="#">Internal Attachments</a> <a href="#">add attachment...</a>	<a href="#">Note to all Suppliers</a> <span style="float: right;"><i>no note</i></span> <a href="#">Attachments for all suppliers</a> <a href="#">add attachment...</a> PO Clauses <span style="float: right;"><a href="#">edit clauses...</a></span> 1 Purchase Order Acceptance 10 Subcontractng 11 Governing Law <span style="float: right;"><a href="#">view all clauses - (14)</a></span>

1. *Go* to the header level of the cart or requisition.
2. For an internal document (i.e. FABAVL snap shot, contract, etc.) *Click* on “add attachment under Internal Notes and Attachments.
3. *Click* on browse and search for the document or link that needs to added to the cart or requisition.
4. *Name* the document.
5. *Save*.

**Note: For an External document (i.e. vendor quote) add the information under External Notes and Attachments.**

**Line Level Attachment**

Internal Note	<i>no note</i>
Internal Attachments	
<a href="#">add attachment...</a>	
External Note	<i>no note</i>
Attachments for supplier	
<a href="#">add attachment...</a>	

1. **Go** to the line of the cart or requisition.
2. For an internal document (i.e. FABAVL snap shot, contract, etc.) **Click** on “add attachment under Internal Notes and Attachments.
3. **Click** on browse and search for the document or link that needs to added to the cart or requisition.
4. **Name** the document.
5. **Save**.

**Note: For an External document (i.e. vendor quote) add the information under External Notes and Attachments.**

**VIII. How To Complete A Cart Assigned To Me – Requisitioners Only:**

1. At the AGGIE-MART home page, **Click** on the “carts” tab.
2. **Click** on the sub-tab, “draft carts.”
3. **Go** to the folder “Draft Carts Assigned to Me,” **Click** on the cart name that you wish to process.
4. **Edit** the **Cart Description** as needed and **Click Save**.
5. **Click** the “Proceed to Checkout” button.

**Note: Be sure that you are looking at the “Summary” sub tab so that you can see the entire requisition.**

6. In the “General” section of the requisition, click the Edit button. Then, Click “Select a different user... under the “Prepared for name. In the **Prepared for** field, click **Search**. The user search screen displays.

7. Enter your name for the search criteria (First Name, or Last Name,) and select the Search button.
8. Select your name from the list of user(s).
9. On the shopping cart page, the **Prepared For** field now displays your name as the selected user.
10. Select **Place Order** to complete the order.
11. The requisition is created in your name and appears in My Requisition list.
12. The requisition will now show that the it is Prepared by and Prepared for you the Requisitioner.

## **IX. How To Search For A Document:**

1. At the **AGGIE-MART** home page, *Click* on the “**Document Search**” tab.

**Note:** You can search information by document type, vendor name, requisitioner/approver, etc.

2. *Click* on the down arrow to select the type of search (i.e. Requisition, Purchase Order). **Tab** and **type** in the information for the search in the text box. (**Example:** Holiday Tours, *Click* on the drop down to narrow the search within a specific date range). *Click* the **GO** button.
3. **Scroll** down the page to find the requisition or purchase order number to retrieve.

**Note:** You may narrow the search under “**Refine Search Results on the left side of the page.**”

## **X. How To Request A Purchase Order Change:** A purchase order must have been completed before a purchase order request can be made.

1. At the **AGGIE-MART** home page, click on the “**Forms**” tab. *Find* the Purchase Order Change Request Form under the Shared Folder.
2. *Click* on the **View Form** button.
3. *Type* the requested information on the form. (*Note: Ensure that you include all the information required in order for the Purchasing Department to complete the request.*)
4. After typing the requested information, *scroll* to the top of the page and at “**Available Actions**” *click* on the down arrow box, *select* “**Add and go to Cart**” and *click* the Go button.

[Available Actions \(Click here for details\):](#)

A screenshot of a web interface showing a dropdown menu. The menu is open, and the option "Add and go to Cart" is selected and highlighted. To the left of the dropdown is a blue hyperlink that reads "Available Actions (Click here for details):".

5. *Click* on the “**Edit**” button in the **Accounting Codes** box. *Type* in the Banner Fund and budget

account line where the product/service will be charged. *Click* the **Save** button. *Scroll* up the page and *Click* on the **Place Order** button. The request is complete.

**XI. How To Withdraw A Requisition:** A requisitioner can withdraw (take back) a requisition anytime before it becomes a purchase order.

1. At the **AGGIE-MART** home page, go to the “**History**” tab.
2. *Click* on “**my requisitions**” sub-tab.
3. Find the requisition that you want to withdraw, and click on the requisition number.
4. *Go* to the “**Available Actions**” area and click on the down arrow and select “**Withdraw Entire Requisition**”. *Click* the **Go** button.

Available Actions:  ▼

5. *Type* the reason that you are withdrawing the requisition, and *click* on the “**Withdraw Entire Requisition**” button.

**XII. How To Delete A Cart:** A requisitioner can delete a cart after it has been returned and will not be used.

1. At the **AGGIE-MART** home page, click on the “**Carts**” tab.
2. *Click* on “**draft carts**” sub-tab.
3. Find the cart number that will be deleted and *Click* on the delete button at the end of the requisition line.

II. My Drafts						<u>legend ?</u>
Active Cart	Cart Number	Shopping Cart Name	Date Created	Cart Description	Total	Delete
	667628	<a href="#">2011-11-11 mcwilli2 01</a>	11/11/2011		0.00 USD	Delete

**XIII. How To Clear Line Items From A Cart/Requisition:** If a requisition is returned/withdrawn, it becomes a cart. The line items in the cart can be removed and the cart can be reused.

1. At the **AGGIE-MART** home page, go to the “**Carts**” tab.
2. *Click* on the name of the cart that you want to remove the line item(s).
3. *Scroll* down the page to the line item(s) and click in the box at the end of each line item(s):

[60' sofa, brown chenille with white strips](#)  **ARTVDF EA 350.00**  **EA 350.00 USD**   
[more info...](#)

4. *Scroll* up to the “**For selected line items**” and *click* on the down arrow and select “**Remove All Items.**” *Click* the Go button.

[For selected line items](#)  

**XIV. How To Receive A Purchase Order:** Purchase Orders must be received in Banner Finance to complete the end-user’s responsibility for ordering goods/services. End-users should not request or hold on to invoices from suppliers. All supplier invoices must be received by University Accounts Payable in order to complete the process for payment processing. Note: Our Accounting Department requires a three way match in order to pay a supplier, using a purchase order.

1. *Log* on to **Banner Finance**.
2. In the *Go* to box; type in “**FPARCVD**” and *Click* the “**Enter**” button on keyboard.
3. In the “*Receiver Document Code Box,*” type “**NEXT.**”
4. *Click* the “**Next Block**” button on the Banner Finance tool bar. or use the keyboard to hit Control/Page Down.
5. At “**Receiver Method**”, click on the down arrow and select the delivery of the goods/services.
6. *Click* the “**Next Block**” button on the Banner Finance tool bar. or use the keyboard to *Hit* (keyboard) **Control/Page Down**
7. At “**Packing Slip**”, if you have a packing slip number, type it into the box. If you do not have a packing slip number, type N/A.
8. *Click* the “**Next Block**” button on the Banner Finance tool bar, or use the keyboard to hit Control/Page Down
9. At “**Purchase Order**”, type in the purchase order number that you are receiving. **Hit** the **Tab** key (on keyboard) to populate the buyer and supplier information.

10. **Go** to toolbar and **Click** on “**Options**”, **Click** on “**Select Purchase Order Items**”. **Hit Next Block or Control Page Down**.
11. **Click** “**Next Block or Control Page Down**” Use your mouse to click the “**Add item box**” for each line item that you are receiving. **Hit F10 or Click the Save Icon** on the toolbar. A Window opens, click **O.K.** Hit the **BLACK X**, click **YES** to close form.
12. **Click** “**Next Block or Control Page Down**”. Tab to “**Current**” box and enter the quantity that is being received. **Tab**. If you have more than one line item that you are receiving, scroll down and continue to enter the quantity for each line item.
13. **Go** to “**Options**” and **Click** on “**Access Completion**”.

**(NOTE:** A window opens, click on the icon beside “**Completion.**” Look in the left hand corner of the document and you should get a message the “**Receiver Document**” Yxxxxxx, has been completed.). *If you forget to write down the Y Doc number, check the bottom of the screen or check on **FOIDOCH***

## **XV. How To Move A Requisition To “My Approval Folder”**

1. **Click** on the “**Approvals**” Tab.
2. **Scroll** down and look within a folder for a requisition with a **State** of “**Not Assigned.**”  
**Note: Documents that have been assigned will not have the Assign link available.**
3. **Click** in the box at the end the requisition.
4. **Click** on the **Assign** link in the Action column to move the document to the **My Approvals** (PR or PO) folder.
5. The document should be the approver’s “**My Approval Folder.**”  
**Note: To move multiple requisitions, they would select more than one requisition**

## **XVI. How To Review A Requisition**

1. Go to the appropriate sub-tab (i.e. “**My Assigned Approvals**” or “**Unassigned Approvals.**”)
2. From the table, select the “**view**” link to the right of the requisition number to access the details of the document.
3. Once you open the document, it will look similar to a cart that is submitted. You may now review and edit the document as needed.
4. Click the **Save Updates** button to save all changes.

## **XVII. How To Approve A Requisition – Approver Only**

**A. Standard Approval: Note: During this process, the approver opens the requisition and reviews the information and makes changes if needed, and then approves/completes the order.**

1. Click on the “*Approvals*” Tab.
2. All requisitions will be housed in folders separated by fund numbers.
3. Select the expand all folder icon  located above the collapsed folders
4. Move the requisition to My PR Approval by clicking assign tab located on the right
5. After moving the requisition(s) to “*My PR Approvals Folder,*” open the document(s), by clicking on the requisition number, review the information and make updates if needed.
6. Once review is completed in the right hand corner look for the [Available Actions:](#)  
 to select the appropriate action for the requisition.

7. Click the **GO** button to approve the action.

8. Approve/Complete option is selected.

**B. Quick Approval: Note: During this process, the approver does not open the requisition for review.**

1. Click on the “*Approvals*” Tab.
2. Go to the appropriate sub-tab (i.e. “*My Assigned Approvals*” or “*Unassigned Approvals.*”)
3. After moving the requisition(s) to “*My Folder,*” click the *Approve* button. Note: If you want to approve multiple requisitions, click on the *Select* checkboxes for the appropriate requisitions, then select *Approve/Complete* from the *Action* drop down list box.

**C. Mobile Approval: Approvers now have the ability of taking action on requisitions quickly whether they are in the office or on the go. With email approvals, approvers will receive an enhanced approval email containing pertinent order information and a quick action webpage link where action may be taken. The email contains order information to allow the approver to make a decision on what action to take on the entire document. The webpage allow the approver to select their action and enter comments. The approver will be able to perform the following actions on a requisition via email approvals:**

- Approve the entire requisition
- Reject the entire requisition
- Return to Requisitioner

- Assign the entire requisition to his/her self.

**Note: A personal approval code is required in order for the approver to take action from the web page link, therefore ensuring the authorized approver is the person taking action on the requisition.**

<b>Mobile Device</b>	<b>BlackBerry</b>	<b>Android</b>	<b>iPhone/iPad/iPod</b>
Supported Operating Systems	4.5	1.X	iOS 4
Supported Browser	BlackBerry Browser	Android - embedded browser	Safari - embedded browser

The following is a list of supported mobile devices for email approval:

Readability of email client varies based on client and formatting selected.

**The following setup is required in order to begin using email approvals:**

1. **Login** to AGGIE-MART
2. At the top of the page, **Click** on the word **Profile** (*beside your name*)
3. **Click** on the **User Settings** tab
4. **Click** on the sub-tab **User Identification**
5. **Scroll** down the page to **Email Approval Code**
6. **Type** in a code that only you will know or remember.
7. **Click Save**

**XVIII. How To Reject A Workflow Requisition (By line or Entire) – Approver Only**

**NOTE:** In order to reject an entire requisition, an approver must reject all the line items for the document. You must open the requisition to review before anything can be rejected.

1. **Click** on “*Approvals*” Tab.
2. **Go** to the appropriate sub-tab (i.e. “**My Assigned Approvals**” or “**Unassigned Approvals.**”)
3. After moving the requisition(s) to “**My Folder.**”
4. **Open** the document(s), by clicking on the requisition number.

5. *Select* the line item(s) to reject by clicking the checkbox to the right of the price. If there is more than one supplier, you can choose to reject all items from a specific supplier. Click the checkbox in the column header row for EACH supplier to select all lines for that supplier.
6. *Select* “**Reject Selected Items**” action from the drop down box, and *Select* GO button to reject the line items
7. *Enter* a rejection reason in the comment pop-up box, and *Select* GO button.
8. *Select* the “**Reject Line Item**” button to save the comment and reject the line item(s).

## **XIX. How To Forward A Requisition To Another Approver – Approver Only**

**Note:** An approver may determine/decide that a different individual is more appropriate to review a particular request. The forward function allows one approver to send the request to another approver for review.

1. *Click* on the “*Approvals*” Tab.
2. *Go* to the appropriate sub-tab (i.e. “**My Assigned Approvals**” or “**Unassigned Approvals.**”)
3. **Option #A:** If you want to forward a requisition that has not been opened/reviewed:
  - *Enable* the Select checkbox on the far right of the folder where the document resides.
  - *Select* the **Forward** option from the **Apply Action** drop down box and click the **GO** button.
  - *Enter* the specific user criteria to find the recipient to forward the requisition.
  - *Click* the **Search** button.
  - *Select* the appropriate user using the radio button to the left of the user’s name.
  - *Click* the **Choose Selected User** button to continue.
  - *Enter* a note for the user that describes the reason to forward the requisition.
  - *Click* the **Forward** button.

**Option #B:** If you decide to forward the requisition once it has been opened:

- *Select* the Forward option from the **Available Options** drop down box and click the **GO** button.
- *Enter* the specific user criteria to find the recipient to forward the requisition.
- *Click* the **Search** button.
- *Select* the appropriate user using the radio button to the left of the user’s name.
- *Click* the **Choose Selected User** button to continue.
- *Enter* a note for the user that describes the reason to forward the requisition.
- *Click* the **Forward** button.

## **XX. How To Assign A Substitute Approver – Approver Only**

**Note: The substitute function is recommended if an approver will be on vacation or does not want to handle orders for a specified time period or dollar amount.**

1. *Click* on the Manage Substitution **tab** located on the top left side.
2. *Select* the **Assign Substitute** to all requisition folders tab.
3. Then type in the last name of the substitute to conduct a search.
4. *Click* the **Search** button.
5. *Select* the appropriate user using the radio button to the left of the user's name.
6. *Click* the **Choose Selected User** button to continue.

**Note: To stop the assignment, “Click End Substitution” to remove the substitution setting for that folder.**

## **XXI. How To Return A Workflow Requisition To The Requisitioner**

**Note: An approver has the ability to reject a requisition/return at any point in the requisition approval process.**

**When a requisition is returned it becomes a draft cart and is no longer a requisition. ALL CHANGES MADE TO A REQUISITION WILL BE RECORDED IN HISTORY.**

**If a cart is resubmitted, the approver will see a new email notification for that request.**

1. *Click* on the “**Approvals**”*Tab*.
2. *Go* to the appropriate sub-tab (i.e. “**My Assigned Approvals**” or “**Unassigned Approvals.**”)
3. From the **Available Actions** drop down box in the upper right hand corner, select **Return to Requisitioner**, then click the GO button. The request will be returned to the original requisitioner.
4. *Enter* the reason for the return.

