AggieBuy – Status & Overview
CSBA Business and Admin Workshop

Presented By
Paul Barzak and Catherine Gibson
AggieBuy Project Team

May 18, 2010
Today’s Presentation

- Key Process Changes
- Content & Placing Orders
- Timeline & Implementation Schedule
- User Roles & Approval Workflows
- User Training & Department set-up
- Site Demo
- Q & A
Key Process Changes

- Web-based application – SSO Login
- Catalog Marketplace – direct ordering
- Departments issuing Purchase Orders
- Use of attachments for Requisitions
- UNSPSC vs. Expense Object Codes
  - Assigned by FMO personnel
- Centralized Invoicing / Vouchering
  - Electronic
  - Paper – entered by FMO personnel
Content / Placing Orders

- **Catalogs**
  - “Punch-out” or “Hosted”

- **Contracts (“Master Orders”)**
  - Campus-wide or Department-specific
  - “How-to-Order” instructions

- **Internal Services**
  - CIS, Physical Plant, Dining Services, etc.

- **Non-Catalog / non-Contract orders**
  - “Limited” FAMIS orders
  - Requisitions for Procurement Services
Participating TAMUS Members

- Texas A&M University
- Texas A&M University - Galveston
- Texas A&M University - Qatar
- TTI - Texas Transportation Institute
- TEEX - Texas Engineering Extension Service
Timeline

- **Pilot Test began** – *February 26, 2010*
  - College of Architecture
  - Mays Business School
  - Chemistry Department
  - Procurement Services and FMO
  - *2,643 Purchase Orders valued at $1,152,213.13*

- **User Training begins** – *May, 2010*

- **Campus-wide Roll-out begins** – *June, 2010*

- **Campus-wide Roll-out complete** – *October, 2010*
Implementation Schedule

- **Group 1** *(Early June)*
  - College of Science
  - College of Geosciences
  - Library
  - Division of Finance

- **Group 2** *(Mid-June)*
  - Athletics
  - Student Affairs
  - Residence Life
  - University Police
Group 3  (*Early July*)
  - College of Engineering
  - College of Education

Group 4  (*Mid-July*)
  - College of Vet. Medicine
  - Bush School
  - Student Financial Aid
  - Office of Admissions and Records
Implementation Schedule – page 3

➢ **Group 5** *(Late July)*
  - College of Agriculture
  - College of Liberal Arts
  - Airport
  - VP Facilities

➢ **Group 6** *(Mid-September)*
  - VP & Assoc. Provost – Info. Technology
  - VP Research
  - University Press
  - Physical Plant
Group 7  *(Late September)*

- Dining Services
- Transportation Services
- Reed Arena
- Presidential Conference Center
- President’s Office
- All other APS Customers
Group 8 *(Early October)*

- TAMU – Qatar
- TAMU – Galveston
- Asst. Provost - International Programs
- Asst. Provost - Undergraduate Programs
- TEEX
- TTI
AggieBuy Roles

1. **Shopper** – essentially equivalent to the “Creator” role in FAMIS, and is the default Role; able to view, access, and browse Catalogs; able to create non-Catalog PR’s and Shopping Carts; may assign accounts; able to view PR’s and PO’s other than their own.

2. **Department Allocator** – may assign or change accounting information on a PR’s; may **not** add line items to a PR but may change quantities of existing line items; may approve or reject an entire PR; approves Invoices, adds accounting information as needed.

3. **Approver** – approves or rejects PR’s. Workflow Rules may be used to tailor the approval process to a department’s needs.

4. **Final Approver** – equivalent to the “Signer” role in FAMIS; final approval releases a PR to either the Supplier directly or to Procurement Services for processing.

5. **Receiver** - enters quantities of goods or services received against PO’s they’ve initiated or that others have initiated.
Approval Path

Shopper → Dept Allocator → Department Approver #1 #2 #3 → Final Departmental Approver

Account Validation and Budget Check

Pre-Approver (Fume Hoods, radioactive, etc.)

Encumbrance

PO released to Supplier (delegated)

Procurement Services (non-delegated)

Receiver
Chemistry Workflow

Shopper Ordering Dept 1 (default Research Accounts)

Shopper Ordering Dept 1 (default Research Accounts)

Shopper Ordering Dept 2 (default Research Accounts)

Shopper Ordering Dept 2 (default Research Accounts)

Shopper Ordering Dept 3 (default Research Accounts)

Shopper Ordering Dept 3 (default Research Accounts)

Department Allocator (non-Research Accounts)

Department Allocator (Research Accounts)

PI (Primary)
SANDRA (Secondary)

Department Allocator (Research Accounts)

PI (Primary)
SANDRA (Secondary)

Department Allocator (Research Accounts)

PI (Primary)
SANDRA (Secondary)

Department Allocator 3 (Research Accounts)

PI (Primary)
SANDRA (Secondary)

Approver
ANGIE

Final Approver
MARY (Primary)
RON (Secondary)

Route to Procurement Services

Release PO

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User/department set-up and Training

➢ On-site meeting 2-weeks in advance
  • Use of Authorization template/Memo
  • Discuss User Roles
  • Set-up Approval Workflow
  • Checklist

➢ Training begins 1-week in advance

➢ Online training – Shopper Role
  • Workshops in Lab by request
  • Quick-Reference Guides

➢ Hands-on training – all other Roles
Questions or Comments?

Paul Barzak
Department of Procurement Services
pbarzak@tamu.edu
845.3816

Catherine Gibson
Financial Management Operations
cdgibson@tamu.edu
847.8833