

Changing Business Unit on AggieBuy Requisitions

When College of Engineering departments and other personnel associated with TAMU create requisitions in AggieBuy on 100% TEES (campus code 28) funds, the “Business Unit” (top field within your shopping cart) needs to be changed from 02-TAMU to 28-Texas A&M Engineering Experiment Station. Unfortunately, this field cannot be changed directly so *you will need to update the “Prepared for” field*. We have set up generic department users for each TAMU department with TEES funds for this process to work. It is important that the following steps be followed so that your requisitions on TEES funds route to the proper back office (TEES vs TAMU) for both Purchasing and Accounts Payable staff to process. Changing this field will mean that a CC28 shipping address will need to be completed along with a CC28 billing address (these are defaults you can set in your [AggieBuy profile](#)).

Steps to change the Business Unit from 02-TAMU to 28-TEES

1. Notice in the below example that the “Business Unit” default is 02-TAMU and the “Prepared by” and “Prepared for” fields are the same person.

The screenshot shows the AggieBuy Shopping Cart interface for user Holley Toshlog. The 'Business Unit' is set to '02-Texas A&M University (02)'. The 'Prepared by' and 'Prepared for' fields are both set to 'Holley Toshlog'. A yellow highlight is under the 'Prepared for' field, and a red box is drawn around the 'Select a different user...' link below it. The interface includes a sidebar with navigation options like Home, Shop, Documents, Contracts, Accounts Payable, Suppliers, Reporting, and Administer. The main content area has a 'Save' button and a 'Proceed to Checkout' button. The cart summary shows 1 item for a total of 0.50 USD.

2. Click on “Select a different user...” under “Prepared for”. In the “Last Name” field of the popup window, put your FAMIS department code and press search.

User Search

Last Name	<input type="text" value="elen"/>
First Name	<input type="text"/>
User Name	<input type="text"/>
Email	<input type="text"/>
Business Unit	<input type="text" value="Business Unit Name"/> <input type="button" value="Q"/>
Ordering Department	<input type="text"/> <input type="button" value="v"/>
Position	<input type="text"/> <input type="button" value="v"/>
Results Per Page	<input type="text" value="10"/> <input type="button" value="v"/>

3. Select the 28-XXXX department code that corresponds to your department. In this example, 28-ELEN and click “select” as the action.

Name ▲	User Name ▲	Email ▲	Phone	Action
28-ELEN, TEES ORDERING DEPT	28-ELEN	DUMMY@TEES.TAMUS.EDU		<input type="button" value="[select]"/>

4. Notice that the Business Unit on your shopping cart has been changed to 28-Texas A&M Engineering Experiment Station (28) as well as the “Prepared for” field updated to the “TEES Ordering Dept 28-XXXX”.

Home | Shop | Documents | Contracts | Accounts Payable | Suppliers | Reporting | Administer

Shop > My Carts and Orders > Open My Active Shopping Cart > Cart - 89992488 - Draft Requisition

Shopping Cart

for Holley Toshlog

Add Non-Catalog Item

Business Unit	28-Texas A&M Engineering Experiment Station (28)	Pre-Pay & Add	<input type="checkbox"/>
Cart Name	2017-06-28 801005071 01	Route to Procurement Services	<input type="checkbox"/>
Share cart	No user groups available. Click here to create shared cart user groups.	Emergency (attach justification)	<input type="checkbox"/>
Prepared by	Holley Toshlog	Sole Source (attach justification)	<input type="checkbox"/>
Prepared for	TEES ORDERING DEPT 28-ELEN	Contract Number	<input type="text"/>
	Select a different user...	Do Not Encumber	<input type="checkbox"/>
Cart Description/Purpose	<input type="text"/>		
Order Category	1 - Regular		
	Select from profile values...		
	Select from all values...		
Fund Type	<input type="text"/>		
	Select from all values...		
Report Reference A	<input type="text"/>		
Report Reference B	<input type="text"/>		

- When you are on the “Summary” tab of the requisition, make sure you have a 28 “Ship To” address and a 28 “Bill To” address selected. Remember that you can set up defaults in your profile (discussed above).

The screenshot shows a web interface for a requisition summary. At the top, there are tabs for 'Requisition', 'PR Approvals', 'PO Preview', 'Comments', 'Attachments', and 'History'. Below these are sub-tabs for 'Summary', 'General', 'Shipping', 'Billing', 'Accounting Codes', 'External Notes and Attachments', 'Supplier Info', and 'Taxes/S&H'. The 'Summary' tab is active. The main content area is divided into three sections: 'General', 'Shipping', and 'Billing'. The 'Shipping' and 'Billing' sections are highlighted with a red box. The 'General' section contains fields for Business Unit (28-Texas A&M Engineering), Cart Name (2017-06-28 101009606 01), Prepared by (Karen Gregory), and Order Category (1 - Regular). The 'Shipping' section has a 'Ship To' field with 'no address' and 'Delivery Options' set to 'Best Carrier-Best Way'. The 'Billing' section has a 'Bill To' field with 'no address'.

- We would love to add a department email address to each of these generic department “users” so your department can be aware if documents have issues (AggieBuy has some built-in email notifications). We would appreciate it if you would please let us (teesaggiebuyhelp@tamu.edu) know an email address to associate with your generic department user if the one you that the email in AggieBuy is not accurate.