



Buy A&M Catalog/Punch- Out Training

TEXAS A&M UNIVERSITY SYSTEM

Creation & Setup

- ▶ Login to Buy A&M through Single Sign On

The screenshot displays two side-by-side panels from a web application. The left panel, titled 'SSO Menu', contains a list of application links, each preceded by a right-pointing arrow: 'Buy A&M', 'eTravel / Concur', 'HRConnect', 'iBenefits', 'LeaveTraq', 'Maestro', 'Time & Effort', and 'TrainTraq'. At the bottom of this panel is a blue button labeled 'Manage Menu'. The right panel, titled 'Recent Logon Activity' with a 'Help' link in the top right corner, features a table with two columns: 'Date/Time' and 'Activity'. The table lists five successful logon events from 'Tarleton' on 01/15/2016 and 01/14/2016. Below the table are three buttons: a blue 'View Security Log' button, a text link 'What should I report?' in blue, and a yellow 'Report Problem' button.

Date/Time	Activity
01/15/2016	Successful Logon from Tarleton
01/15/2016	Successful Logon from Tarleton
01/14/2016	Successful Logon from Tarleton
01/14/2016	Successful Logon from Tarleton
01/14/2016	Successful Logon from Tarleton

Home Screen

Upon Logging in you will be directed to the Buy A&M Home Screen

The screenshot displays the Buy A&M Home Screen. At the top, there is a navigation bar with the Texas A&M University System logo, a search bar, a 'Catalog' dropdown, and an 'Advanced' link. Below the navigation bar, a row of six colored boxes provides a summary of document counts and their status: 10 Documents Ready for Approval (orange), 1 Requisition Ready for Purchasing (green), 0 Bid Solicitation Ready to Send (red), 1 Bid Solicitation Ready to Open (pink), 1 PO Ready to Send (purple), and 1 Change Order Ready To Send (brown). On the left side, there is a vertical sidebar with icons for various document types. The main content area is divided into two sections. The left section, titled 'News', contains a table with columns for Date, Category, and Title, and a message stating 'No news items.' The right section, titled 'Recent Documents', contains a table with columns for Document #, Type, Description, Status, and Last Viewed. The table lists four documents: 0006029 (Receipt, New User Training, Approved for Invoice, 01/12/2017), AM04-16-P001367:0 (Purchase Order, New User Training, Partial Receipt, 01/12/2017), 0004159 (Receipt, New User Training, In Progress, 01/12/2017), and AM04-17-R011885 (Requisition, Tarleton Test, Ready for Approval, 01/10/2017).

THE TEXAS A&M UNIVERSITY SYSTEM

Search... Catalog Advanced

10 Document(s) Ready for Approval

1 Requisition(s) Ready for Purchasing

0 Bid Solicitation(s) Ready to Send

1 Bid Solicitation(s) Ready to Open

1 PO(s) Ready to Send

1 Change Order(s) Ready To Send

News

Date	Category	Title
No news items.		

Recent Documents

Document #	Type	Description	Status	Last Viewed
0006029	Receipt	New User Training	Approved for Invoice	01/12/2017
AM04-16-P001367:0	Purchase Order	New User Training	Partial Receipt	01/12/2017
0004159	Receipt	New User Training	In Progress	01/12/2017
AM04-17-R011885	Requisition	Tarleton Test	Ready for Approval	01/10/2017

Creating A Punchout Requisition


The screenshot displays the procurement dashboard for The Texas A&M University System. At the top, there is a search bar and a 'Catalog' dropdown. Below this, a row of colored boxes shows the status of various document types: 10 Document(s) Ready for Approval (orange), 1 Requisition(s) Ready for Purchasing (green), 0 Bid Solicitation(s) Ready to Send (red), 1 Bid Solicitation(s) Ready to Open (pink), 1 PO(s) Ready to Send (purple), and 1 (brown). A 'News' section on the left indicates 'No news items.' The 'Recent Documents' table on the right lists the following items:

Document #	Type	Description	Status	Date
0006029	Receipt	New User Training	Approved	01/12/2017
AM04-16-P001367-0	Purchase Order	New User Training	Receipt	01/12/2017
0004159	Receipt	New User Training	In Progress	01/12/2017
AM04-17-R011885	Requisition	Tarleton Test	Ready for Approval	01/10/2017



A red arrow points from the 'G2B Punchout' option in the top right menu to the 'Status' column of the 'Recent Documents' table.

- ▶ Punchout's may be accessed using the gear icon on the menu bar
- ▶ Click on G2B Punchout

Upon selecting the G2B Punchout option you will be re-directed to the following screen



G2B Punchout Shopping

Vendor	<input type="text"/>
Department	04PURCH - PURCHASING & CENTRAL SERVICES <input type="text"/>
Location	PURCH - PURCH <input type="text"/>
Ship-to Address	<input type="text"/>  Tarleton State University Business Services Box T-0120 Stephenville, TX 76401 US Email: test@periscopeholdings.com Phone: (123)456-7890
Bill-to Address	<input type="text"/>  Tarleton State University Business Services Box T-0120 Stephenville, TX 76401 US Email: test@periscopeholdings.com Phone: (123)456-7890

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Select the Vendor you would like to utilize from the drop down menu

The screenshot shows a web browser window with the URL <https://buy-train.tamus.edu/bso/g2b/punchout.sdo?mode=initial>. The page is titled "G2B Punchout Shopping" and features a sidebar with icons for various applications. The main content area includes a "Vendor" dropdown menu with options: BURGOON COMPANY, CDWG, and Summus-Staples. Below this, there are fields for "Department" (CENTRAL SERVICES), "Location", "Ship-to Address", and "Bill-to Address". The "Ship-to Address" and "Bill-to Address" fields are populated with the following information: Tarleton State University, Business Services, Box T-0120, Stephenville, TX 76401, US, Email: test@periscopemholdings.com, Phone: (123)456-7890. At the bottom of the form, there are three buttons: "Punchout", "Reset", and "Cancel & Exit". The "Punchout" button is circled in red, and an arrow points to it with the text "Click 'Punchout'". The footer of the page displays "Current Org: AM04 - Tarleton State University" and the date "January 12, 2017 3:03:54 PM CST".

Vendor

Department

Location

Ship-to Address

Bill-to Address

Tarleton State University
Business Services
Box T-0120
Stephenville, TX 76401
US
Email: test@periscopemholdings.com
Phone: (123)456-7890

Tarleton State University
Business Services
Box T-0120
Stephenville, TX 76401
US
Email: test@periscopemholdings.com
Phone: (123)456-7890

Click "Punchout"

Punchout Reset Cancel & Exit

Current Org: AM04 - Tarleton State University | January 12, 2017 3:03:54 PM CST

You will be re-directed to the vendor's website

My Account ▾ |  Cart (0)



▼ Search CDW...



HARDWARE

SOFTWARE

SOLUTIONS

CLOUD

BRANDS

BLOG

DEALS

Buy A&M Online Catalog



THE TEXAS A&M
UNIVERSITY SYSTEM

Welcome to the Texas A&M University System Online Catalog (Buy A&M). This site will provide account information, product offerings, and contract pricing on over 150,000 of the top technology products and services in the industry. CDW's just-in-time inventory model and multiple distribution centers will ensure you have the products and solutions you need when you need them.

IMPORTANT NOTICES

APPLE: Purchasing Apple products through this site is prohibited. Please contact your Purchasing Department or Apple directly for a quote.

To Find the CDWG Account Manager for your school, please click the link below:

[CDW-G Account Managers for the Texas A&M System](#)

To place an order via an account manager generated quote:

- Enter your quote number in 'Find my Quote' and click 'Find' to retrieve your quote
- Click the 'Add to Cart' button next to your quote
- Continue shopping or Click on 'Transfer Cart' to return to the e-procurement system

To find order status, tracking information, and other order related information:

- Enter your order number or PO number in 'Find my Order' and click 'Find' to retrieve your order

[CDW-G's Deal of the Week](#)

When navigating, click on the CDW-G logo in the upper left hand corner to return home.

[Return to CDW-G Catalog](#)

If you need help or have product related questions please contact your CDWG Account Manager.

Add the items you would like to purchase to your shopping cart

Home

YOU HAVE SELECTED

Keywords
thumb drive [x Clear All](#)

NARROW YOUR RESULTS

Filter Mode
☒ Guided ☐ Advanced

Subcategory
[Cables \(17\)](#)
[Computer Accessories \(2\)](#)
[Computers \(3\)](#)
[Data Storage Products \(890\)](#)
[Memory \(3\)](#)
[\[+\] View More Options](#)

Contract
[Dell Held Texas DIR Agreement DIR-SDD-1951](#)
[E&I Cloud Storage and Productivity Solutions](#)
[Epson BrighterFUTURES - Projectors](#)
[Epson BrighterFUTURES Printers & Scanners](#)
[MARKET](#)
[\[+\] View More Options](#)

Brand
[Kingston Technology \(158\)](#)
[Transcend \(126\)](#)
[Verbatim \(98\)](#)
[SanDisk \(79\)](#)
[Autodesk \(71\)](#)

1 - 25 of 1020 View: 25 | 50 | 75 1 2 3 4 5 ... 41 NEXT >>

Search Within: Add Keyword Sort By: Best Match ☐ Show Ready to Ship

☐ Add to Compare

Aleratec 1:10 USB 3.0 Copy Cruiser Mini Computer Connect Thumb Drive Duplic
Mfg. #: 330113 | CDW #: 3041850
★☆☆☆☆ [Read 1 review](#)
Interface Support: SuperSpeed USB 3.0
Qty Supported: 10
Warranty: 1 year warranty
Availability: **In Stock**
CDW's Lowest Online Price
~~\$317.20~~
Extranet Price
 1
[Ships same day if ordered before 2 PM CT](#)
[Save as Favorite](#)

☐ Add to Compare

Kingston DataTraveler G4 – USB flash drive – 8 GB
Mfg. #: DTIG4/8GB | CDW #: 3177897
Storage Capacity: 8 GB
USB Interface: USB 3.0
Features: Key ring loop
Warranty: 5 years warranty
Availability: **In Stock**
\$7.97
Extranet Price
 1
[Ships today if ordered within 0 hrs 46 mins](#)
[Save as Favorite](#)

☐ Add to Compare

Kingston DataTraveler G4 – USB flash drive – 16 GB
Mfg. #: DTIG4/16GB | CDW #: 3177893
Storage Capacity: 16 GB
USB Interface: USB 3.0
Availability: **In Stock**
\$7.97
Extranet Price



Once you have added all of your items to the cart click "checkout"

Shopping Cart

[Continue Shopping](#)[E-mail This Cart](#)

Add Item to Cart:

[Add](#)

Item	Quantity	Availability	Unit Price	Item Total	
 <u>Kingston DataTraveler G4 - USB flash drive - 8 GB</u> MFG Part#: DTIG4/8GB CDW Part#: 3177897 UNSPSC: 43202010 <div>Extranet Price: \$7.97</div>	<input type="text" value="1"/> Update	In Stock	\$7.97	\$7.97	Remove
 Ships today if ordered within 0 hrs 45 mins					

Subtotal: \$7.97

[Checkout](#)

Tax and shipping will be calculated in checkout.



Transfer Shopping Cart



Transfer Shopping Cart

Thank You for shopping at CDW!

Please click the "Transfer Shopping Cart" button to transfer your CDW shopping cart.



Please **do not** click on the back button on your browser at this time. Doing so will erase your shopping cart.

Final invoice might include an environmental [recycling fee](#) for certain products shipped to certain states.

- When you select check out from the Vendor website you will see this screen
- Click "transfer shopping Cart"

After checking out from the companies website you will be directed to either choosing your Fiscal Year or to the General tab of your requisition.

Please select the fiscal year for the new document from the dropdown below.

Fiscal Year:

2017 ▼



Click **“Save & Continue”**

Save & Continue

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Release Punchout Requisition AM04-17-R011898

GeneralItemsVendorsAddressAccountingRoutingAttachmentsNotesRemindersSummary

Requisition Number:

Status:

Department:

Location:

Required By Date:

Requisition Type:

Requestor:

Contact:

Alternate ID:

Estimated Cost:

Print Format: *

RPA Goods Received Date : (MM/DD/YYYY HH:MM:SS AM or PM)

Special Payment Handling :

User Ref / Ref 4 :

Rush Payment :

TIBH :

Blanket Requisition? :

NAICS - <http://www.census.gov/cgi-bin/sssd/naics/naicsrch?chart=2007> :

REF A :

REF B :

Date Last Updated:

AM04-17-R011898

1RI - In Progress

04PURCH - PURCHASING & CENTRAL SERVICES

PURCH - PURCH

Release

Training User 09

\$7.97

Req Print Form ▾

▾

▾

▾

▾

▾

01/12/2017 03:17:42 PM

Short Description*:

52B From CDWG

Fiscal Year:

2017

Organization:

AM04 - Tarleton State University

Solicitation Enabled:

☐

Entered Date:

01/12/2017

Type Code:

▾

Purchaser:

▾

Contact Phone:

Tax Rate:

▾

User Last Updated:

Training User 09

Save & Continue

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After you have transferred your shopping cart your requisition will be created and open in the general tab. Change the Short Description to the product(s) you are ordering. Click "**Save & Continue**" then click on the Items tab.

Look over your items to ensure they are correct. Since you have already selected the vendor and shipping address these tabs can be skipped. Click the Accounting tab

Release Punchout Requisition AM04-17-R011898

Status: 1RI - In Progress

General **Items** Vendors Address **Accounting** Pricing Attachments Notes Reminders Summary

General Vendors Address Accounting Notes

Sort by Column: Print Sequence

☐ Sort Descending

Go

Item #	Links	Print Sequence	Quantity	Minimum Order Quantity	Catalog Price/ Unit Cost	Net Unit Cost	UOM	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost
1	Master Blanket # / Line #: AM01-16-P003406 / 1	1.0	Kingston DataTraveler G4 USB flash drive 8 GB	1.0	0.0	\$7.97	\$7.97	EA - Each	\$0.00	\$0.00	\$7.97
Total										\$0.00	\$7.97

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Accounting Tab


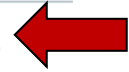
Release Punchout Requisition AM04-17-R011898 Status: 1RI - In Progress

General Items Vendors **Accounting** Routing Attachments Notes Reminders Summary

Total Extended Amount: 7.97 Unapplied Distribution Amount: 7.97

Delete All	Fiscal Year	CAMPUS*	DEPT	SUB-DEPT	ACCOUNT*	SUPPORT ACCT*	SUBCODE (OBJ)	CR1	CR2	CR3	CLASS CODE	RES	EXEC	DIV	COLL	FUND	UIN1	UIN2	Percent	Dollars
<input type="checkbox"/>																			100.0	0.00

REF C: REF D:

Account Code:  

Total: 0.0 0.00

! If using Save Based on Dollars, entered dollar amounts may be adjusted during Rebuild for All Items to ensure proper item account transactions.

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Accounting must be added for all requisitions
Search for your account using the looking glass

Clicking on the magnifying glass will bring up the following search box:

Buy A&M | Test - Lookup Account Code - Google Chrome

Secure | <https://buy-test.tamus.edu/bsa/document/acct/lookupAccount.sdo?external=true&fiscalYear=168>

Lookup Account

Search Using: ALL of the criteria

Search Fields:

Account Code Description

Browse by:

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
0 1 2 3 4 5 6 7 8 9

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-Type in the account number
you will be charging the
purchase to

-click "Find it"

This will pull up a list of account numbers in the system that match the search criteria

Buy A&M | Test - Lookup Account Code - Google Chrome

Secure | <https://buy-test.tamus.edu/bsa/document/acct/lookupAccount.sdo>

Lookup Account

Search Using: ALL of the criteria

Search Fields: Account Code Description

Browse by: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
0 1 2 3 4 5 6 7 8 9

Select	Fiscal Year	Account Code	Description	Available Dollars	Maximum Dollars	Pre-Encumbered Dollars	Encumbered Dollars	Expended Dollars	Budget Dollars
<input type="radio"/>	2016	T4-PURCH-00001-231260-00000-.....N-FA-FA--L--	PURCHASING AND CENTRAL SERVICES	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

- Select the account number that will be used for the purchase

- Click "Select"

The account number you selected will be entered into the requisition

Open Market Requisition AM04-16-R003462 Status: TRI - In Progress

General Items Vendors Address Accounting Routing Attachments Notes Reminders Summary

Validation Errors
Accounting distribution is missing and required.

Total Extended Amount = 5200.00 Unapplied Distribution Amount = 5200.00

Delete All	Fiscal Year	CAMPUS*	DEPT	SUB-DEPT	ACCOUNT*	SUPPORT ACCT*	SUBCODE (OBJ)	CR1	CR2	CR3	CLASS CODE	RES	EXEC	DIV	COLL	FUND	UNIT	UNIT	Percent	Dollars
<input type="checkbox"/>		T4	PURCH	00001	231260	00000						N	FA	FA		L			100.0	0.00

REF C: REF D:

Account Code: T4-PURCH-00001-231260-00000—N-FA-FA-L-

Total 0.0 0.00

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- Click "Save based on Percentages"

- Click "Rebuild for all items"



General Items Vendors Address Accounting Routing Attachments Notes Reminders Summary

Look over the summary tab and make sure everything looks correct.

Routing, Attachments, Notes, and Reminders tabs can be skipped for Punch-outs.

Header Information

Requisition Number:	AM04-17-R011898	Short Description:	Training	Status:	1RI - In Progress
Organization:	AM04 - Tarleton State University	Location:	PURCH - PURCH	Required By Date:	
Department:	04PURCH - PURCHASING & CENTRAL SERVICES	Requisition Type:	Release	Type Code:	
Entered Date:	01/12/2017	Purchaser:		Fiscal Year:	2017
Requestor:	Training User 09	Contact Phone:		Alternate ID:	
Contact:		Estimated Cost:	\$7.97	Print Format:	Req Print Form
Pcard Enabled:	No	Bill-to Address:	Tarleton State University Business Services Box T-0120 Stephenville, TX 76401 US Email: test@periscopeholdings.com Phone: (123)456-7890		
Solicitation Enabled:	No				
Invoice Method:	Three Way Match				
Ship-to Address:	Tarleton State University Business Services Box T-0120 Stephenville, TX 76401 US Email: test@periscopeholdings.com Phone: (123)456-7890				
RPA Goods Received Date :					
Special Payment Handling :					
User Ref / Ref 4 :					
Rush Payment :					
TIBH :					
Blanket Requisition? :					
NAICS - http://www.census.gov/cgi-bin/sssd/naics/naicsrch?chart=2007 :					
REF A :					
REF B :					

Attachments

Agency Files:
Agency Forms:
Vendor Files:
Vendor Forms:

At the bottom of the page click "Submit for Approval".

Item Information ⓘ

Submit for Approval

Cancel Requisition

Print

Only one approval path "02GOLD" matches the document's criteria.

Approval Path	Description	Dollar Range	Approvers		
			User	Level	Type
02GOLD	AM02 - GOLD Dept. - Departmental Approval	\$0.00-\$9,999,999,999,999.99	Training Approver01	10	Primary
			Training Approver02	10	Alternate
			Training Approver03	10	Alternate
			Training Approver04	10	Alternate
			Training Approver05	10	Alternate
			Clint Merritt	10	Alternate
			DONNA YOUNG	10	Alternate

Please click Continue to continue submitting the document, or click Cancel & Exit to cancel the document submission and go back to the document.

Continue

Cancel & Exit

- The approval path will show up.
- Make sure it is going to the correct approvers.
- Click "Continue"
- Once the requisition has been approved your order will be automatically submitted.

REQUISITION COMPLETE

- ▶ Upon status changing to “Ready for Approval” the submission of your requisition is complete.
- ▶ The document will electronically route for Approval
- ▶ The requestor will receive an e-mail when the document is approved and converted to a PO.