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Approval Routing Process Instructions for Aggie Enterprise (AE)

Aggie Enterprise (AE) catalog Punchouts replaced AggieBuy for access to Suppliers such as Amazon Business, Dell, and ODP (Office Depot). Using AE Punchout does not have the same approval routing as AggieBuy. To enable a systems approval flow to Directors and Designated Purchase Approvers*, the following provides an option for a "Re-assign" and "Submit" process.

Similar to AggieBuy, you can use the AE Punchouts to select a Supplier and items to purchase and build a cart. A Requester** builds this cart and provides all the relevant information (e.g. items to be ordered, chartstring, delivery address etc).

Basic process flow:



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INSTRUCTIONS FOR REQUESTER 1. Requestor uses AE catalog Punchout to build a cart. The cart is sent back to Aggie Enterprise and a Requisition is created. I E 191 uisitions () Shop by Category ОК TOPS 5 x 8 Legal Pads, 12 Pack amazon SOC - Supplier for office use O Ap Amazon Basics LCD 8-Digit Desktop Calculator B \$26.06 Each Welcome, Aggie Enterprise Users! Visit our SCM website! Visit our Aggie Enterprise SCM website

*Designated Purchase Approver: usually Unit/County Director. In some cases, PI/budget manager **Requester: typically office staff member assigned to make office purchases

2. Requester reassigns the Requisition to Director or Designated Purchase Approver by following these steps:



b. Requester returns to "Recent Requisitions" and goes back into the Requisition

equisitions @		
	·	
Shop by Categor	y ▼ Search	
Recent Requisit	ions	View Mon
REQ00021790	TOPS 5 x 8 Legal Pads, 12 Paok, The Legal Pad Brand, Narrow Ruled, White Paper, 50 Sheets Per Writing Pad, Made in th	Incomplete
REQ00021790 REQ00020206	TOPS 5 x 8 Legal Pads, 12 Pack, The Legal Pad Brand, Narrow Ruled, White Paper, 50 Sheets Per Writing Pad, Made in th BOC - Supplies for office use	Incomplete Incomplete
REQ00021790 REQ00020208 REQ00016297	TOPS 5 x 8 Legal Pads, 12 Paok, The Legal Pad Brand, Narrow Ruled, White Paper, 50 Sheets Per Writing Pad, Made in th BOC - Supplies for office use Business Operations Center - Office Supplies for team use	Incomplete Incomplete Incomplete

c. Requester clicks "Actions," then "Reassign"



d. Requester searches by last name in "Reassign To" prompt

	Reasingin Req			
	* Reassign To	Shum	Category Name	Quantity
ļ		Shum, Alyssa 100000B - UC Davis Campus STI	DT 3 1-530-752-1011 aeshum@ucdavis.edu	3
_		Shum, Carol 100000B - UC Davis Campus GSR	R-FULL FEE REM 1-530-752-1011 cshum@ucdavis.edu	
l		Shum, Jessica 100000B - UC Davis Campus TE	EACHG ASST-GSHIP 1-530-752-1011 jgshum@ucdavis.e	edu
		Shum, Nicole 100000B - UC Davis Campus ST	DT 2 1-530-752-1011 ncshum@ucdavis.edu	
		Shum, Su-Lin 991000B - ANR FINANCIAL SVC	MGR 2 1-530-752-1011 sshum@ucanr.edu	eral
		Shuman, Amy 100000B - UC Davis Campus HR	CENERALIST 4 1-530-752-1011 amyshuman@ucdavis	.edu DM
		More		

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BUSINESS OPERATIONS CENTER

e. Requester checks off "Send notification to this person"



When Requester hits "OK", the Requisition gets reassigned to Director/Designated Purchase Approver. Then the Requisition will no longer show up in Requester's "Recent Requisitions."

Note: Requester needs to add/edit all relevant information to the Requisition before hitting "OK" in the "Reassign Requisition" window.

Confirmation	×
Requisition REQ00016297 was reassigned to requester Shum, Su-Lin	
ОК	4

"Charge Accounts" need to include the correct chart string from the Common Chart of Accounts."

Important note: Charge Accounts" saved in an Aggie Enterprise user's "Requisition Preferences" will not transfer from user to user. E.g., if Requester selects account saved in "Favorite Charge Accounts" and then reassigns the Requisition to the Designated Purchase Approver, the Designated Purchase Approver may not see the same account information and may need to input the correct chart string manually.

For Projects (i.e. if PPM is needed and not GL):

a. Click the pencil icon next to your name to edit Requisition Preferences

More Tasks 🔻	More Tasks Manage Requisitions		₩ 1
		Requester	

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b. Enter Project chart string

Edit Requisition Preferences			
Select the requisitioning BU where your preferences will be applicable.			
Requisitioning BU UCD REQ Business Unit			
Shipping and Delivery			
* Requester Bezark, Elizabeth Q			
Deliver-to Location Type Internal 💙			
* Deliver-to Location 2801 2nd ST RM 0101, MS48822 Q			
Deliver-to Address 2801 2nd ST, MS48822, RM 0101, DAVIS, CA 95618, UNITED STATES			
Destination Type Expense 🗸			
✓ Billing			
▲ Projects			
Project Number KL0CSNVMCP Q			
* Task Number TASK01			
* Expenditure Type 532302			
* Expenditure Organization 9923266 🔹			
* Contract Number KL83848			
* Funding Source UCCE CENTRAL SIERRA COUNTY			
Favorite Charge Accounts	+		

This is what it looks like after you submit the Requisition:

Project	Task Number	Expenditure	Expenditure	Expenditure	Contract
Number		Item Date	Type	Organization	Number
KL0CSNVMCP	TASK01	2/28/24	532302 - Repairs a	r 9923266 - UCCE C	KL83848

The Director/Designated Purchase Approver takes next steps in these instructions (next page).

INSTRUCTIONS FOR DIRECTOR OR DESIGNATED PURHCASE APPROVER

3. Director or Designated Purchase Approver goes to "Recent Requisitions" in Aggie Enterprise

Aggie Enter	prise	Purch Requise	ase Purchase Agreements Purchase Orders My Receipts Suppliers
equisitions ⑦ Shop by Categor) y▼ Search		
Recent Requisiti	ons	View More	Recent Purchases
REQ00023742 REQ00021790	BOC - test cart TOPS 5 x 8 Legal Pads, 12 Pack, The Legal Pad Brand, Narrow Ruled, White Paper, 50 Sheets Per Writing Pad	Incomplete	amazon business
REQ00020208 REQ00011479	BCC - Supplies for office use Business Operations Center office supplies for team use.	Incomplete	Amazon Basics LCD 8-Digit Desktop Calculator, B
			\$26.06 Each
Top Categories			Purchasing News
M	SCM		Welcome, Aggie Enterprise U: Visit our SCM website! https://ace/ychain.ucdavis.edu/

4. Director or Designated Purchase Approver clicks the "Actions" button and selects "Edit"

		EB
Check Funds	View Actions V	0 <u>o</u> ne
	Duplicate	
	Cancel Requisition	
	Delete	
	Edit	
	Reassign	
	View Document History	
	View PDF	

5. Director or Designated Purchase Approver clicks "Submit"

Once submitted, the Requisition will proceed to the fiscal officer for review and then it will be forwarded in the AE system. Then a "Purchase Order" is created and items will be purchased. Both Requester and Director/Designated Purchase Approver will receive email notifications from UC Davis Purchasing.

Shop	Check Funds	Manage Approvals	View PDF	Save 💌	Sub <u>m</u> it
Requi	Requisition Amount 41.35 USD				
App	oroval Amount	Calculate Amount with Ta	ix.		
Funds Status Not reserved					
	Attachments No	one 🕂			

Requester will receive shipping and delivery notifications from Punchout Vendor.

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HOW TO REVIEW REQUISITION ROUTING AFTER SUBMISSION

Note: If you want to check routing, look at "Document History" after clicking "Submit" following the steps below:

a. Go into an "Approved Requisition"



b. Go to "Actions" -> "View Document History"



Document History: REQ00011552

Entered By Requisitioning BU Requisition	Su-Lin Shum		
View View Format View Format View	電 音 記 📣 Wrap		
Action Performed Performed By	Action Date	Reference Document	Additional Information
Submit purchase order Fitzgerald, Brian	1/31/24 8:33 AM	PO UCDPO00005926	
▲ Submit requisition FShum, Su-Lin	1/30/24 5:12 PM	Requisition REQ00011552	
Approve Musil, Erin	1/31/24 8:33 AM		
Reserve Application	1/31/24 8:33 AM		
Reassign requisition PBezark, Elizabeth	1/30/24 5:09 PM	Requisition REQ00011552	The requisition was reassigned to Shum, Su-Lin.
Reassign requisition FShum, Su-Lin	1/30/24 5:06 PM	Requisition REQ00011552	The requisition was reassigned to Bezark, Elizabeth.