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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).

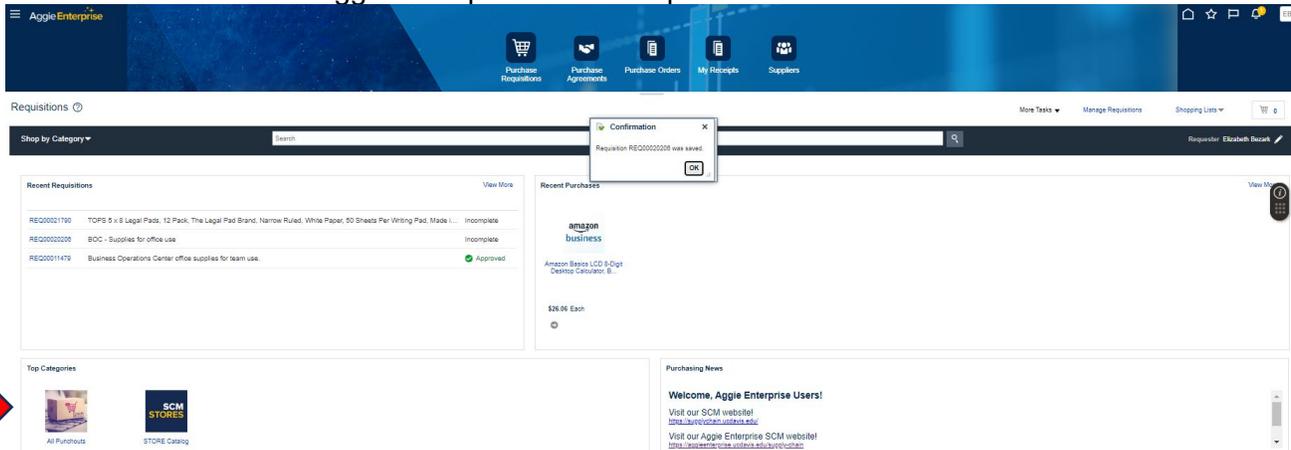**Basic process flow:**

In this document you will find:
(CTRL + Click to follow links in this table of contents)

INSTRUCTIONS FOR REQUESTER

1. **Requestor uses AE catalog Punchout to build a cart**.
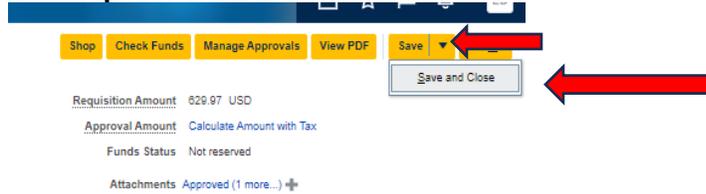   The cart is sent back to Aggie Enterprise and a Requisition is created.

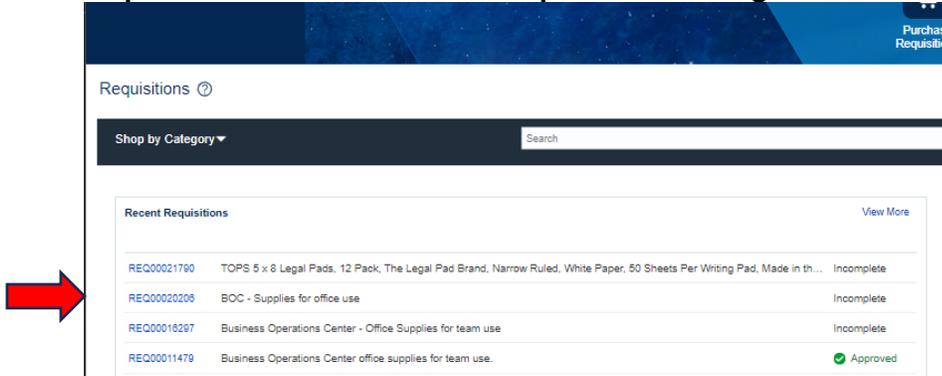*__Designated Purchase Approver__: usually Unit/County Director. In some cases, PI/budget manager
**__Requester__: typically office staff member assigned to make office purchases

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2. **Requester reassigns the Requisition to Director or Designated Purchase Approver by following these steps:**
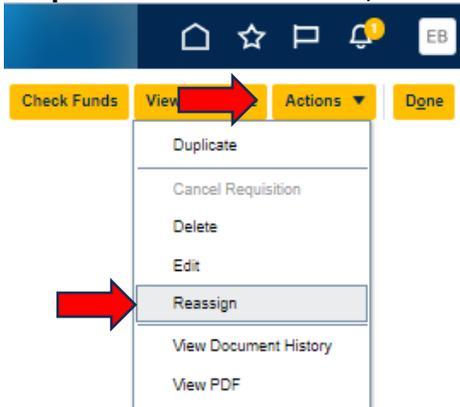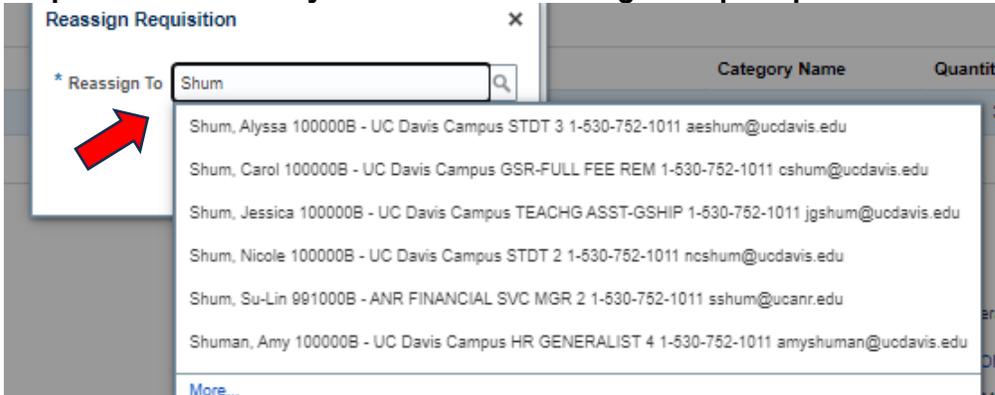   a. **Requester clicks "Save and Close"**

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

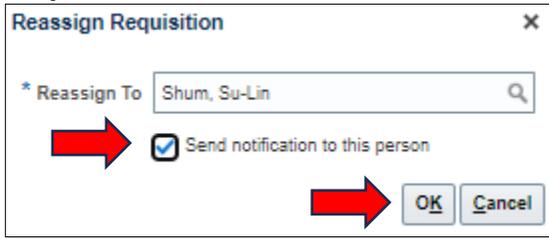   c. **Requester clicks "Actions," then "Reassign"**

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

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

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.**
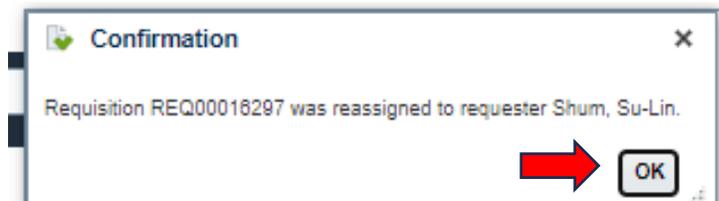

 "Charge Accounts" need to include the correct chart string from the Common Chart of Accounts. "

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**
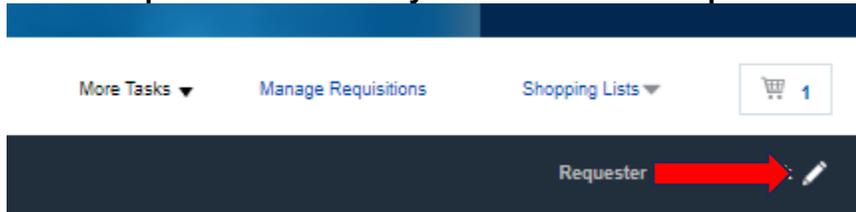
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b. **Enter Project chart string**

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

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

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

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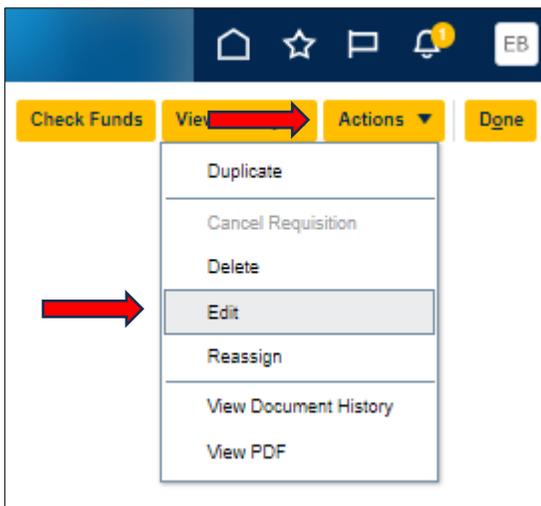****Requester**: typically office staff member assigned to make office purchases

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INSTRUCTIONS FOR DIRECTOR OR DESIGNATED PURHCASE APPROVER

3. **Director or Designated Purchase Approver goes to "Recent Requisitions" in Aggie Enterprise**
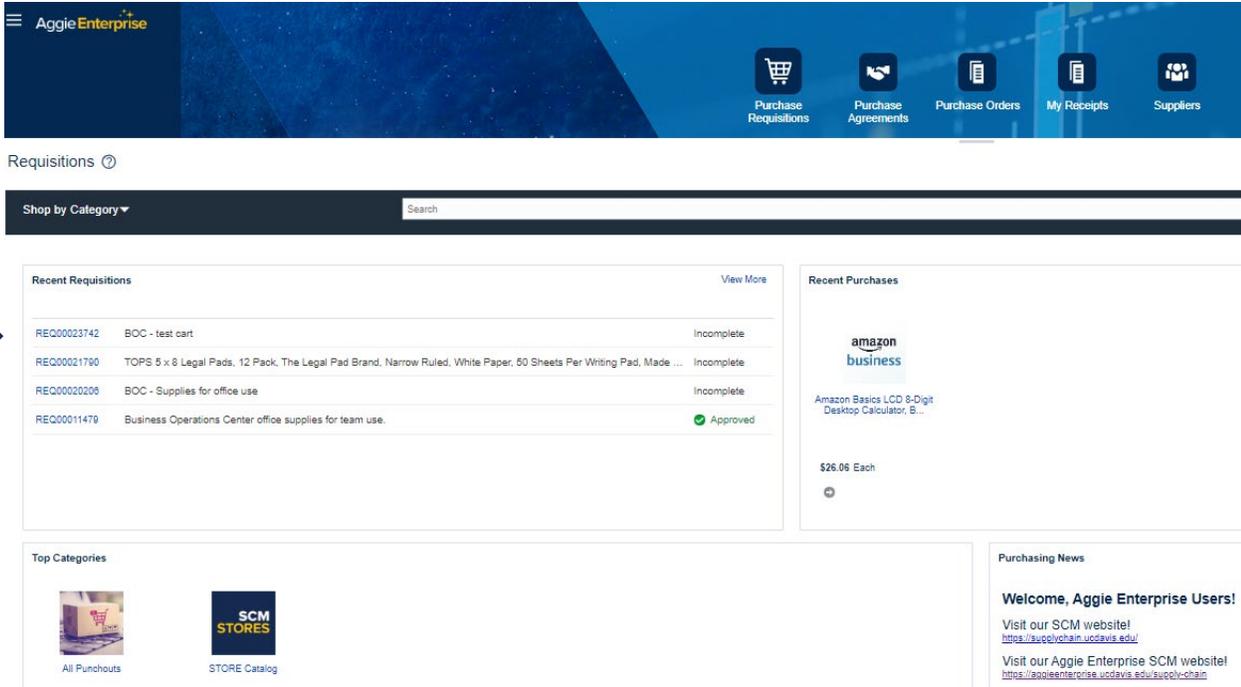
4. **Director or Designated Purchase Approver clicks the "Actions" button and selects "Edit"**

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**__Requester__: typically office staff member assigned to make office purchases

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.

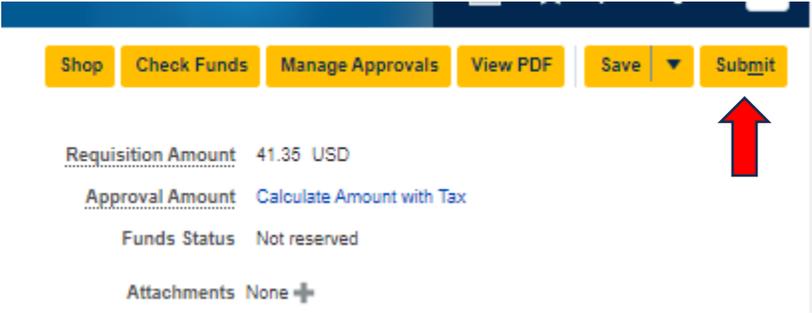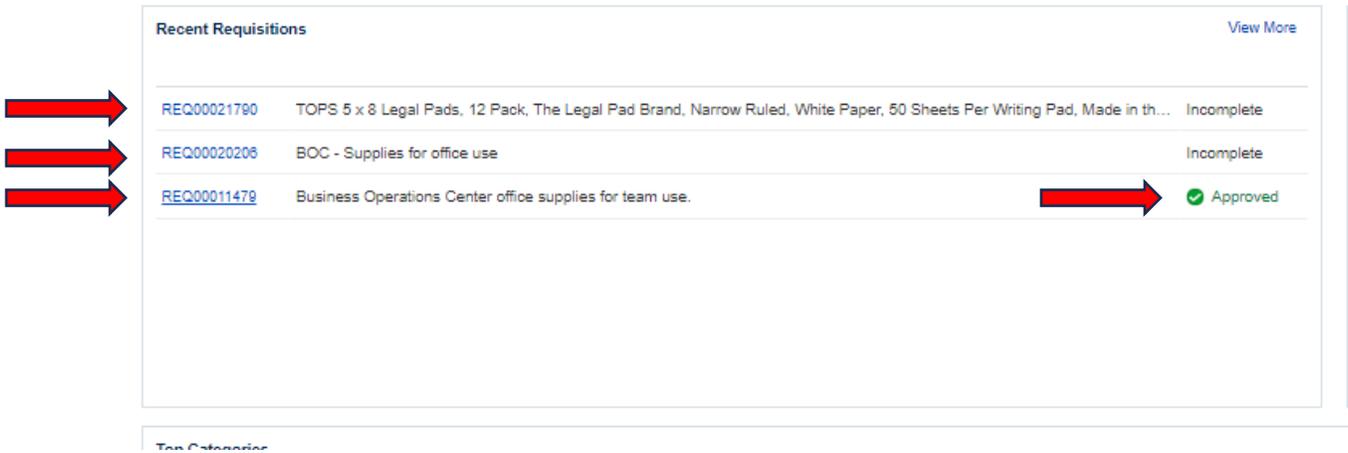Requester will receive shipping and delivery notifications from Punchout Vendor.

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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"

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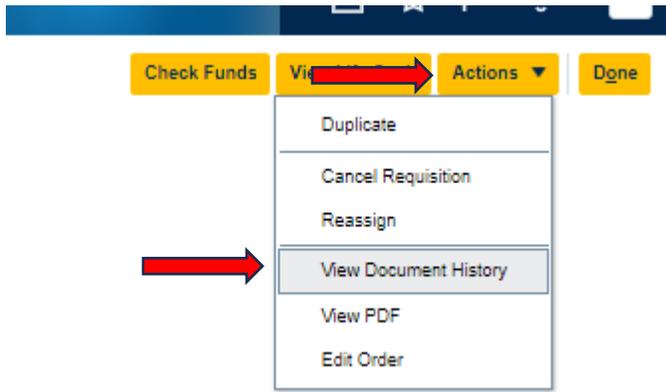**Requester: typically office staff member assigned to make office purchases

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Document History: REQ00011552

Entered By	Su-Lin Shum
Requisitioning BU	UCD REQ Business Unit
Requisition	REQ00011552

View ▼   Format ▼   ▥ Freeze   ▣ Detach   ≡ ≡ ≡   ↵ 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	Shum, 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	Bezark, Elizabeth	1/30/24 5:09 PM	Requisition REQ00011552	The requisition was reassigned to Shum, Su-Lin.
Reassign requisition	Shum, Su-Lin	1/30/24 5:06 PM	Requisition REQ00011552	The requisition was reassigned to Bezark, Elizabeth.

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