AggieBuy Classroom Exercises – Routing/Approvals

Where to Go in AggieBuy to Approve

In this exercise, you will learn how to locate orders in AggieBuy awaiting your approval.

1. In the banner at the top right corner of your screen, click on the Action Items (flag) icon.

2. Here you may have two headings: My Assigned Approvals and Unassigned Approvals. A Requisition that you have assigned to yourself can’t be approved by anyone else unless you return it to the “shared folder” (where it can be accessed by anyone with authority to approve Requisitions for the related Account). Click Requisitions to Approve if you’d like to view a list of the Requisitions you’ve assigned to yourself. Click Requisitions if you’d rather see a list of orders that have not yet been assigned to any single approver and are available for you to approve.

3. Look for another place where you can find Requisitions awaiting your approval. Hint: You’ll need one of the icons on the left side of your screen. Aside from Requisitions awaiting your approval, what else can you find here?

4. In the list of Requisitions awaiting approval, can you find a way to show less detail? (This option is ‘sticky’ and will be in effect for all approval lists until you change it back.) What options are available for filtering the list? How about sorting the list? How can you show more (or fewer) results on each page of Requisitions?

5. Put a check mark in the box to the right of a Requisition (or Requisitions) and click on the down arrow next to Assign above the list. What are your other options for the checked Requisition(s)? Once you’ve made your choice, where would you click to complete the action?

6. At the top left corner of the screen, click the drop-down arrow next to Group Results By and choose Folders. The first folder is titled “My PR Approvals.” Can you guess how the Requisitions in this folder differ from the other Requisitions? If you’re not sure, open the My PR Approvals folder and note the action buttons on the right. Now open another folder and note the action buttons in this folder.
7. In some cases, one Account will have more than one folder. Why is that? What’s the difference between the folders?

8. Note that the number of Requisitions appearing in each folder is limited by the amount in the **Results per folder** field above the list on the right. To change the maximum number of Requisitions appearing in each folder, choose another number from the drop-down menu.

9. Select a Requisition in a folder by putting a check in the box to the right. Now close the folder. (You can do this by clicking the arrow to the left of the folder name, or by clicking **collapse all** at the top of the list.) Note that the text “Contains selected rows” appears to the right of the folder name. *If an action is chosen from the drop-down menu above the list of folders, that action will apply to selected Requisitions in all folders, even if they’re closed.*

10. If you want to see a Quick View of a Requisition instead of opening it, where would you click? (If you click the Requisition number to open the full Requisition window, use the **Back to Approvals** link to return to your list of approvals instead of the back button.) If you want to see the oldest Requisitions at the top of the list, how would you do that?

**Assigning an Order to Yourself vs. Approving on the Spot**

In a list of Requisitions awaiting approval, most of the Requisitions can be approved by any one of a list of approvers. If you want to work on approving a Requisition but aren’t ready to approve it immediately, assign the Requisition to yourself. This makes the Requisition unavailable to other approvers. You’ll also need to assign a Requisition to yourself if you want to return or reject it. In this exercise, you will learn how to assign a Requisition to yourself. You’ll also learn how to approve a Requisition without assigning it to yourself.

1. In a list of Requisitions available for your approval, those that haven’t yet been assigned will have a blue **Assign** button on the right. To assign the Requisition to yourself, click the **Assign** button. Requisitions with a gray Assign button are ones you’ve already assigned to yourself. How could you assign several Requisitions to yourself at once? If you wanted to assign or approve Requisitions for a specific Account, how could you easily find them?

2. If you have assigned a Requisition to yourself and decide to unassign it, you can return it to the shared folder. Can you figure out how to do this in the list of approvals? How about in a Requisition window?
3. To approve a Requisition without assigning it to yourself, put a check mark in the box to the right of the Requisition in the Approvals list. Click on the down arrow next to Assign above the list and choose Approve/Complete. If you wanted to approve several Requisitions at once, how would you do that? Can you approve assigned and unassigned Requisitions at the same time?

4. If you wanted to locate a specific Requisition to assign or approve without opening a list of all Requisitions awaiting your approval, how could you do that? Once you have the Requisition open, how would you assign or approve it?

5. How could you find all Requisitions prepared by a certain user that are awaiting your approval? Extra credit: How could you find all Requisitions prepared by a certain user (or other criteria) that are awaiting department approval?

**Returning a Requisition vs. Rejecting a Requisition**

In this exercise, you will learn the difference between returning a Requisition and rejecting it, and how to do each. To return or reject a Requisition, you must have assigned the Requisition to yourself, and you must have the Requisition window open.

**Returning a Requisition**

1. Choose a Requisition from your Approvals list to return. If you haven’t assigned the Requisition to yourself, you can do that in the Approvals list, or after you open the Requisition.

2. Open the Requisition window by clicking on the Requisition number. Click on Document Actions at the top of the window. If you haven’t yet assigned the Requisition to yourself, you can do that here. What are your other options?

3. If you’d like, you can add a Comment before returning the Requisition. What are two ways in which you can add a Comment to the Requisition? In the Add Comment window, you can choose to send an email to the Requester. What might you include in your email?

4. Choose Return to Requester to return the Requisition for corrections. The Requester will receive a notification that the Requisition has been returned. Once the Requisition is corrected, the Requester can resubmit it.
Rejecting a Requisition

1. Choose a Requisition from your Approvals list to reject. If you haven’t assigned the Requisition to yourself, you can do that in the Approvals list, or after you open the Requisition.

2. Open the Requisition window by clicking on the Requisition number. Click on Document Actions at the top of the window. If you haven’t yet assigned the Requisition to yourself, you can do that here.

3. If you’d like, you can add a Comment before rejecting the Requisition. In the Add Comment window, you can choose to send an email to the Requester. What might you include in your email?

4. In the Document Actions menu, choose Reject Requisition. The Requester will receive a notification that the Requisition has been rejected.

5. Once rejected, a Requisition cannot be resubmitted. How is this different from returning a Requisition?

Rejecting an Individual Line Item

In this exercise, you will learn how to reject a single line item on a Requisition while approving the rest of the Requisition. To reject a line item, you must have assigned the Requisition to yourself, and you must have the Requisition window open.

1. Choose a Requisition from your Approvals list to reject. If you haven’t assigned the Requisition to yourself, you can do that in the Approvals list, or after you open the Requisition.

2. Open the Requisition window by clicking on the Requisition number. If you haven’t yet assigned the Requisition to yourself, how would you do that?

3. If you’d like, you can add a Comment and have the Comment emailed to the Requester. What might you put in your Comment?

4. Scroll down to the line item you’d like to reject. Put a check mark in the box on the right of the line item, then click Selected Line Item Actions above the list of items. How would you reject multiple line items at once?

5. Choose Reject Selected Items. The Requestor will receive a notification that the line item has been rejected.
Using History Section to See All Activity for Transaction

In this exercise, you will learn how to view all actions taken on a specific document.

1. Locate the document by typing the document number into the search window in the top right corner of the screen, or by using the Document Search section of the home page. Can you find another method of locating a document?

2. In the document window, look for the History link in the top right corner of the screen. Click the link to see a list of every action taken on this document.

3. The default sort is by date and time. Experiment with sorting the list of actions by other columns. Also, click on Click to filter history to open a window where you can filter the list by date and action. What other filter is available here?

4. If you wanted to save the history in an Excel document, how might you do this? Hint: Once open, a CSV file can be saved as an Excel file.