

# Welcome!

## AggieBuy Overview for Window Shoppers





## Welcome to AggieBuy!

- AggieBuy is the UC Davis e-procurement system for ordering supplies and equipment from many university-contracted suppliers:
  - Catalogs include office, laboratory, medical, research, maintenance, and custodial supplies and equipment
  - Current list of AggieBuy suppliers is on our [website](#)



## Welcome to AggieBuy!

- Available for all UC Davis employees and affiliates, with the exception of Hospital employees
- Hosted and punch-out catalogs are available



## Logging in to AggieBuy






- Log in with your campus user ID and Kerberos passphrase at <https://aggiebuy.ucdavis.edu>


## Different Catalog Types

- **Hosted** catalogs allow searches within AggieBuy itself; great for price and feature comparisons; easy to identify the lowest priced item(s); great if you don't know what supplier sells a particular product
- **Punch-out** catalogs “punch out” to supplier's website; customer shops within website and returns cart to AggieBuy: great for seeing stock availability, configuring items, creating and using e-quotes, and when you want to use a specific supplier

# Hosted Catalog Searches

- On the Main Dashboard, in the **Product Search** section, enter your desired search criteria

	<b>Tape, Paper, Micropore, Porous, Secures ostomy appliances and frequently changed dressings, 10 yd. (9.1m) in., 12/Pk., Cs. 10/Pk., 1530-1 120/CS</b> from Fisher Scientific Company LLC
<a href="#">larger image</a>	Part Number: 19027761 (CS) Manufacturer Info: 1530-1 - (Three M Company) Easy Buy: Yes
	<b>Pen Paper Mate InkJoy 300 RT Retractable, Med, Blk, Pk/12</b> from Office Depot
<a href="#">larger image</a>	Part Number: 779964 Manufacturer Info: 1951260 - (Paper Mate)
	<b>Pen Paper Mate InkJoy 300 RT Retractable Pens, Med, Blue, Pk/12</b> from Office Depot
<a href="#">no image available</a>	Part Number: 779982 Manufacturer Info: 1951259 - (Paper Mate)
	<b>Pen, RED, MED, Paper Mate InkJoy 100, Pk/12</b> from Office Depot
<a href="#">larger image</a>	Part Number: 706297 Manufacturer Info: PAP1951255 - (Paper Mate)
	<b>Kitchen Paper Towels</b> from Waxie Sanitary Supply
<a href="#">larger image</a>	Part Number: 850630 Manufacturer Info: 566316 - (WAXIE BRAND SB)



**Product Search**
↺ ?

Search



[Advanced Search](#)

**Shortcuts**  
[Favorites](#) | [Quick Order](#)


**Browse**  
[Suppliers](#) | [Categories](#) | [Contracts](#)



1.94 USD  
DZ



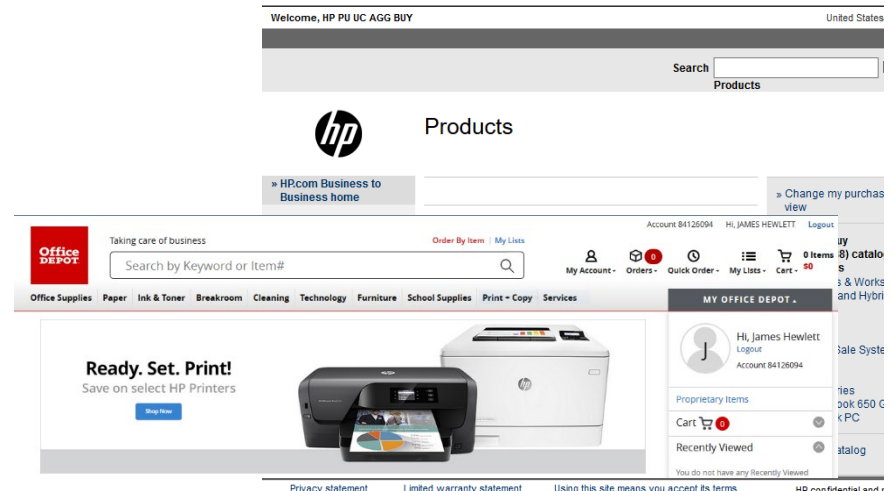
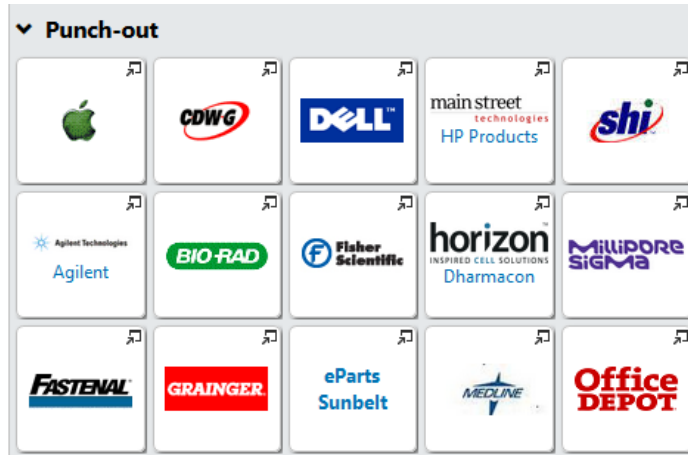
20.25 USD  
Free Shipping  
CS



add favorite | compare

# Punch-Out Catalog Searches

- On the Main Dashboard, in the **Showcases, Punch-Out** section, click the tile of the supplier for which you wish to shop:



## What is a Window Shopper?

- All active UC Davis employees are assigned **Window Shopper** access
- A **Window Shopper** is an AggieBuy user who can shop hosted and punch-out catalogs, build a shopping cart, but not submit it directly into routing
- A **Window Shopper** assigns their shopping cart to an AggieBuy **Requester** who then completes the order and submits it into routing

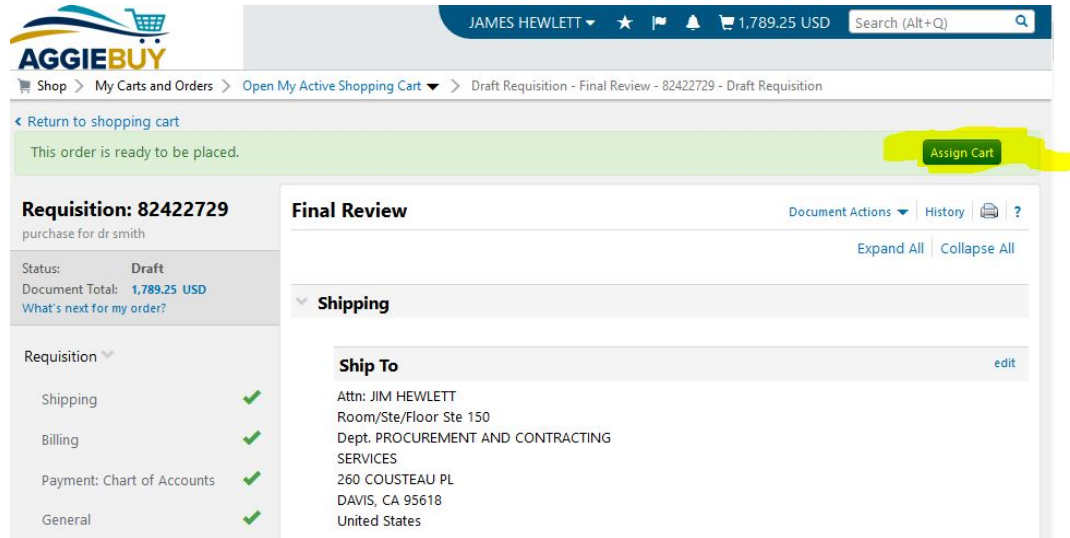


## What Does a Window Shopper Need?

- **System Required:**
  - Item(s) you want
  - Name of your Cart Assignee
- **System Optional:**
  - Account Information
  - Capital Asset Information (if purchasing items above \$5K)
  - Shipping Information

## Identify Cart Assignee at Cart Checkout

- After you have finished building your shopping cart, click on **Assign Cart** button to search and locate Cart Assignee:



AGGIEBUY

JAMES HEWLETT ★ 🚚 1,789.25 USD Search (Alt+Q)

Shop > My Carts and Orders > Open My Active Shopping Cart > Draft Requisition - Final Review - 82422729 - Draft Requisition

< Return to shopping cart

This order is ready to be placed. **Assign Cart**

**Requisition: 82422729**  
purchase for dr smith

Status: Draft  
Document Total: 1,789.25 USD  
What's next for my order?

Requisition ▾

- Shipping ✓
- Billing ✓
- Payment: Chart of Accounts ✓
- General ✓

**Final Review** Document Actions ▾ History 🖨 ?

Expand All Collapse All

Shipping ▾

**Ship To** edit

Attn: JIM HEWLETT  
Room/Ste/Floor Ste 150  
Dept. PROCUREMENT AND CONTRACTING SERVICES  
260 COUSTEAU PL  
DAVIS, CA 95618  
United States

## Who is My Cart Assignee?

- Contact your supervisor or business office
  - They will let you know the name of the person to whom you should assign your cart
  - Your Cart Assignee should have an AggieBuy **Requester** role
  - The Cart Assignee is the person that submits the cart on your behalf

## What account(s) should I use?

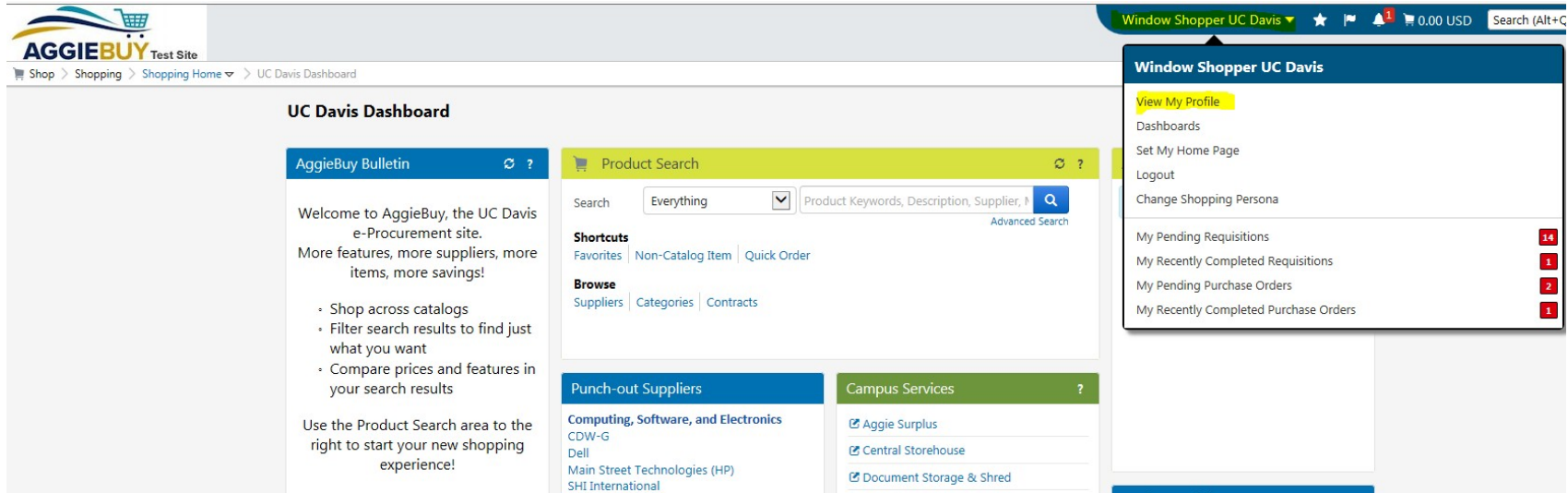
- Contact your supervisor or business office
  - They will let you know if you should enter account information directly or if they prefer that your Cart Assignee do this for you
  - They will also let you know if you should enter any Capital Asset information for items over \$5K, or if the Cart Assignee will do this as well

## Set Defaults in Your User Profile

- You can save your cart assignee names, accounts, and delivery addresses as part of your profile
- You can then select them or enter different one(s) as necessary each time you build a shopping cart

# Set Defaults in Your User Profile

- Click on your name in upper right corner and select **View My Profile**



The screenshot shows the AggieBuy UC Davis Dashboard. The top navigation bar includes the AggieBuy logo, a search bar, and a user profile icon. The user profile icon is highlighted, and a dropdown menu is open, showing the following options:

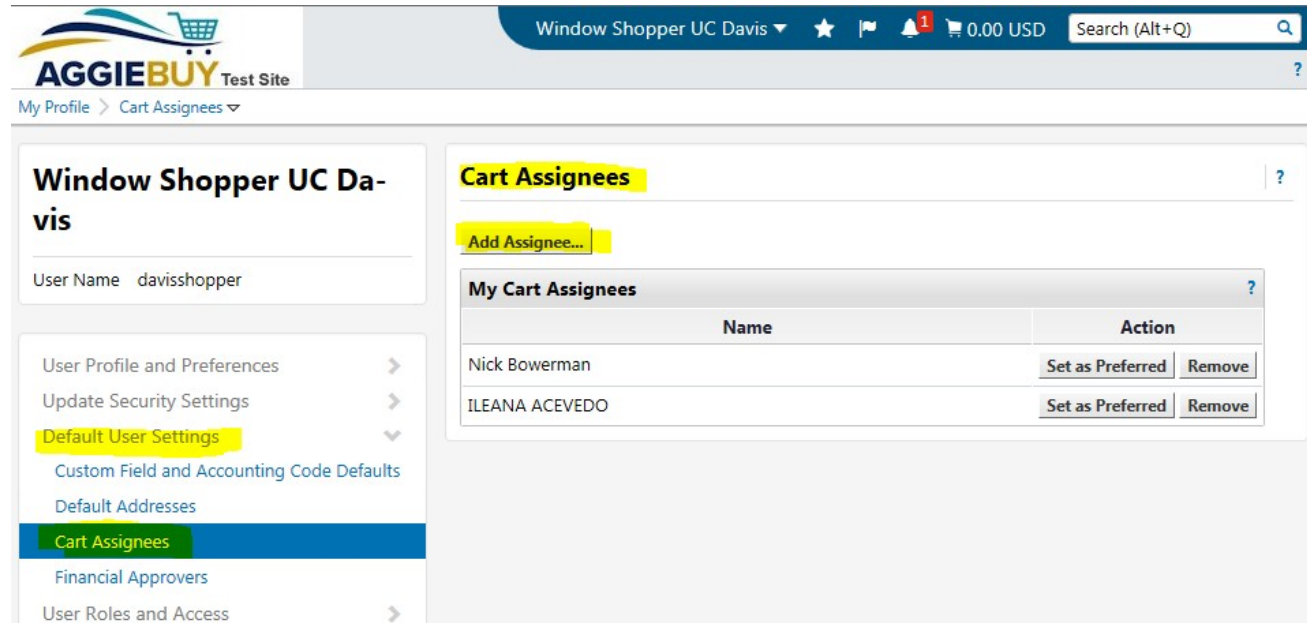
- View My Profile** (highlighted)
- Dashboards
- Set My Home Page
- Logout
- Change Shopping Persona
- My Pending Requisitions (14)
- My Recently Completed Requisitions (1)
- My Pending Purchase Orders (2)
- My Recently Completed Purchase Orders (1)

The dashboard itself is titled "UC Davis Dashboard" and contains several sections:

- AggieBuy Bulletin**: A blue box with a refresh icon and a question mark. It contains a welcome message and a list of features: "Shop across catalogs", "Filter search results to find just what you want", and "Compare prices and features in your search results". It also includes a note about the Product Search area.
- Product Search**: A yellow box with a search bar and a dropdown menu. It includes a "Product Keywords, Description, Supplier, N" search bar and an "Advanced Search" button. Below the search bar are links for "Shortcuts" (Favorites, Non-Catalog Item, Quick Order) and "Browse" (Suppliers, Categories, Contracts).
- Punch-out Suppliers**: A blue box with a list of suppliers: "Computing, Software, and Electronics", "CDW-G", "Dell", "Main Street Technologies (HP)", and "SHI International".
- Campus Services**: A green box with a list of services: "Aggie Surplus", "Central Storehouse", and "Document Storage & Shred".

## Set Default Cart Assignee(s)

- On the left, click on **Default User Settings**, and select **Cart Assignees**

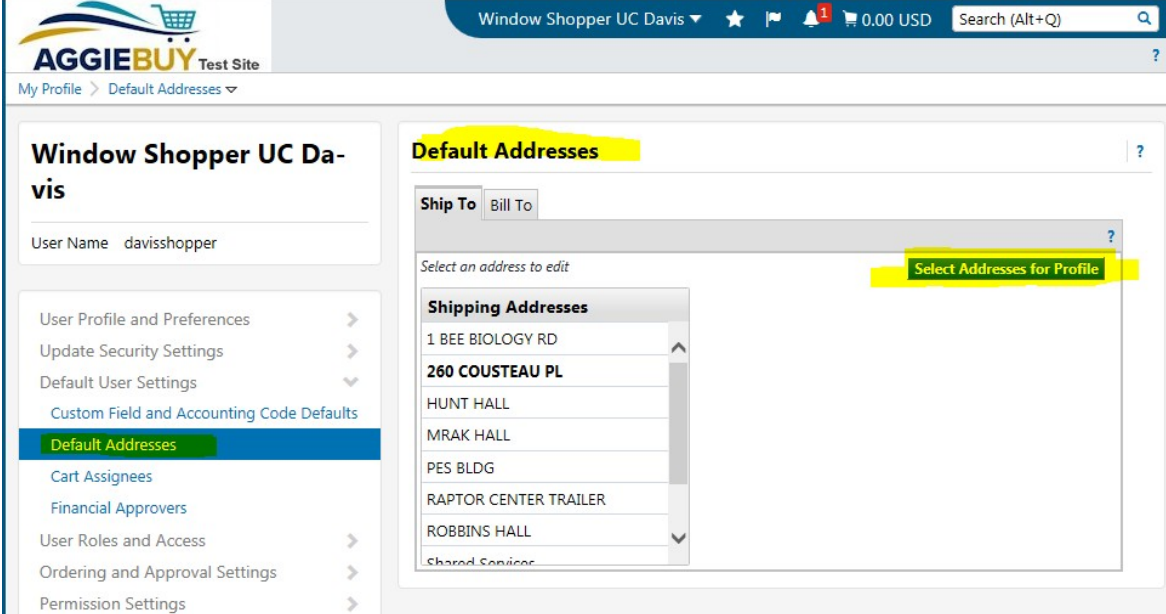


The screenshot shows the AGGIEBUY Test Site interface. The top navigation bar includes the AGGIEBUY logo, the user name 'Window Shopper UC Davis', a star icon, a flag icon, a notification bell with a red '1', a shopping cart icon with '0.00 USD', and a search bar with the text 'Search (Alt+Q)'. Below the navigation bar, the breadcrumb trail reads 'My Profile > Cart Assignees'. The left sidebar contains a list of settings: 'User Profile and Preferences', 'Update Security Settings', 'Default User Settings' (highlighted in yellow), 'Custom Field and Accounting Code Defaults', 'Default Addresses', 'Cart Assignees' (highlighted in blue), 'Financial Approvers', and 'User Roles and Access'. The main content area is titled 'Cart Assignees' and includes an 'Add Assignee...' button. Below this is a table titled 'My Cart Assignees' with two columns: 'Name' and 'Action'. The table lists two assignees: 'Nick Bowerman' and 'ILEANA ACEVEDO'. Each row has two buttons: 'Set as Preferred' and 'Remove'.

Name	Action
Nick Bowerman	<a href="#">Set as Preferred</a> <a href="#">Remove</a>
ILEANA ACEVEDO	<a href="#">Set as Preferred</a> <a href="#">Remove</a>

## Set Default Delivery Address(es)

- On the left, click on **Default User Settings**, and select **Default Addresses**



The screenshot shows the AGGIEBUY Test Site user profile page for 'Window Shopper UC Davis'. The left sidebar contains a menu with 'Default Addresses' highlighted. The main content area shows the 'Default Addresses' section with a 'Ship To' tab selected. A list of shipping addresses is displayed, with '260 COUSTEAU PL' highlighted. A yellow box highlights the 'Select Addresses for Profile' button.

**AGGIEBUY Test Site**

Window Shopper UC Davis ▾ ☆ 🚚 1 0.00 USD Search (Alt+Q) 🔍

My Profile > Default Addresses ▾

**Window Shopper UC Davis**

User Name davishopper

User Profile and Preferences >  
Update Security Settings >  
Default User Settings ▾  
Custom Field and Accounting Code Defaults  
**Default Addresses**  
Cart Assignees  
Financial Approvers  
User Roles and Access >  
Ordering and Approval Settings >  
Permission Settings >

**Default Addresses** ?

Ship To Bill To ?

Select an address to edit

**Shipping Addresses**

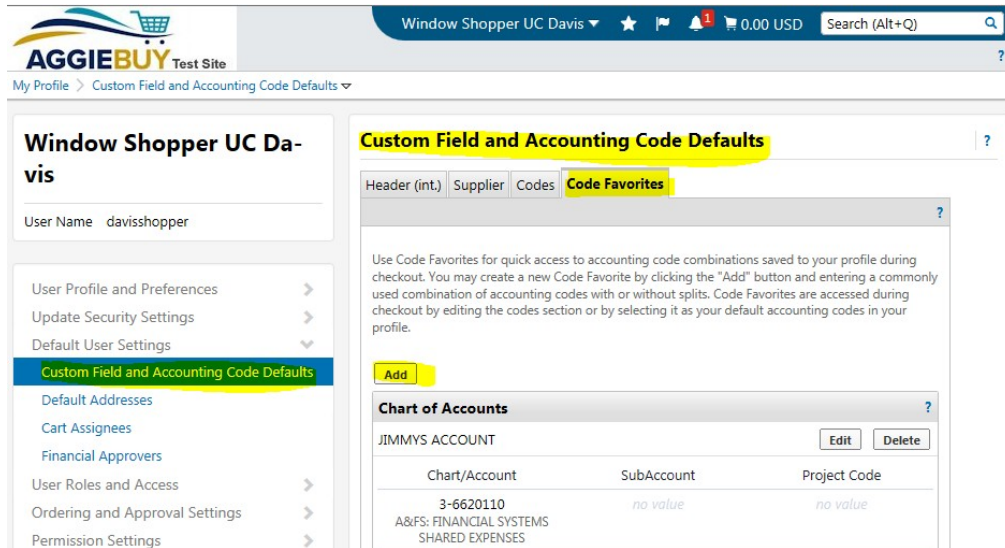
1 BEE BIOLOGY RD  
**260 COUSTEAU PL**  
HUNT HALL  
MRAK HALL  
PES BLDG  
RAPTOR CENTER TRAILER  
ROBBINS HALL  
Shared Services

Select Addresses for Profile



## Set Default Account(s)

- On the left, click on **Default User Settings**, and select **Custom Field and Accounting Code Defaults**



Window Shopper UC Davis

My Profile > Custom Field and Accounting Code Defaults

### Window Shopper UC Davis

User Name davishopper

- User Profile and Preferences
- Update Security Settings
- Default User Settings
- Custom Field and Accounting Code Defaults**
- Default Addresses
- Cart Assignees
- Financial Approvers
- User Roles and Access
- Ordering and Approval Settings
- Permission Settings

#### Custom Field and Accounting Code Defaults

Header (int.) | Supplier | Codes | **Code Favorites**

Use Code Favorites for quick access to accounting code combinations saved to your profile during checkout. You may create a new Code Favorite by clicking the "Add" button and entering a commonly used combination of accounting codes with or without splits. Code Favorites are accessed during checkout by editing the codes section or by selecting it as your default accounting codes in your profile.

**Add**

#### Chart of Accounts

JIMMYS ACCOUNT

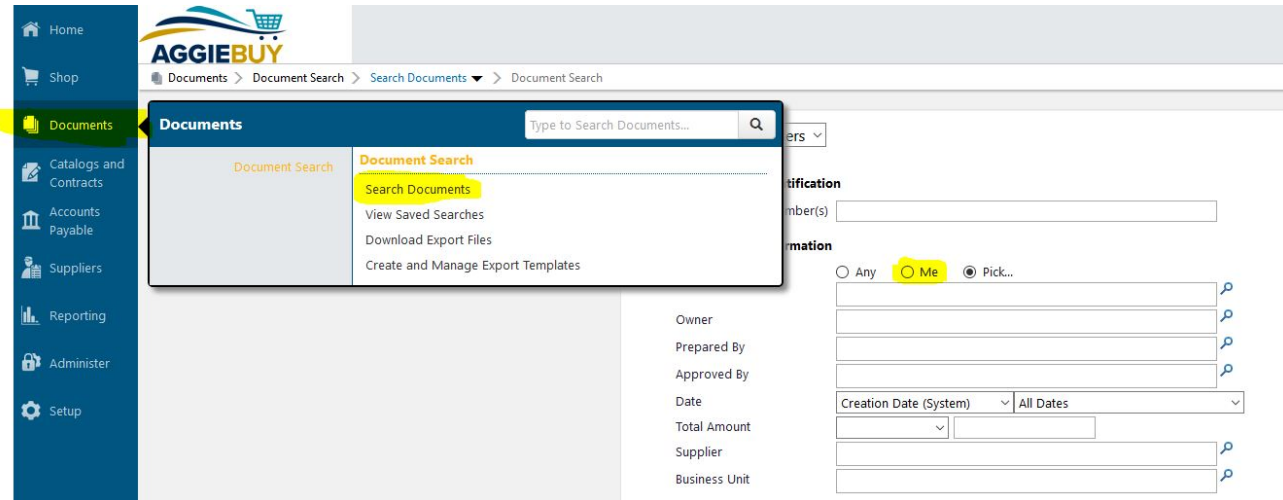
Chart/Account	SubAccount	Project Code
3-6620110 A&FS: FINANCIAL SYSTEMS SHARED EXPENSES	no value	no value

## AggieBuy General Workflow

- **Window Shopper** shops AggieBuy catalogs and builds their cart
- **Window Shopper** assigns Requisition to Cart Assignee (**Requester**)
- **Requester** submits Requisition; **Fiscal Officer/Account Delegate** approves it
- **Purchase Order** is created in AggieBuy and exported to supplier(s)
- Item(s) are shipped and supplier invoices for order; payment is automatically issued to pay the supplier

## Viewing Purchase Orders

- On left menu, click **Documents**, select **Search Documents**, and in **Participant(s)** field, select **Me** to see Purchase Orders created from your Requisitions:



The screenshot shows the AGGIEBUY web application interface. On the left is a blue sidebar menu with icons and labels: Home, Shop, Documents (highlighted with a yellow arrow), Catalogs and Contracts, Accounts Payable, Suppliers, Reporting, Administer, and Setup. The main content area has a header with the AGGIEBUY logo and a breadcrumb trail: Documents > Document Search > Search Documents > Document Search. A dropdown menu is open under 'Search Documents', showing options: Document Search, Search Documents (highlighted in yellow), View Saved Searches, Download Export Files, and Create and Manage Export Templates. To the right of the dropdown is a search bar with the placeholder text 'Type to Search Documents...'. Below the dropdown, there are several input fields and dropdowns for filtering search results, including 'Participant(s)', 'Creation Date (System)', and 'All Dates'. The 'Participant(s)' field has a dropdown menu with 'Any', 'Me' (highlighted in yellow), and 'Pick...'. The 'Creation Date (System)' field has a dropdown menu with 'All Dates'. The 'All Dates' field has a dropdown menu with 'All Dates'. The 'Participant(s)' field has a dropdown menu with 'Any', 'Me' (highlighted in yellow), and 'Pick...'. The 'Creation Date (System)' field has a dropdown menu with 'All Dates'. The 'All Dates' field has a dropdown menu with 'All Dates'.

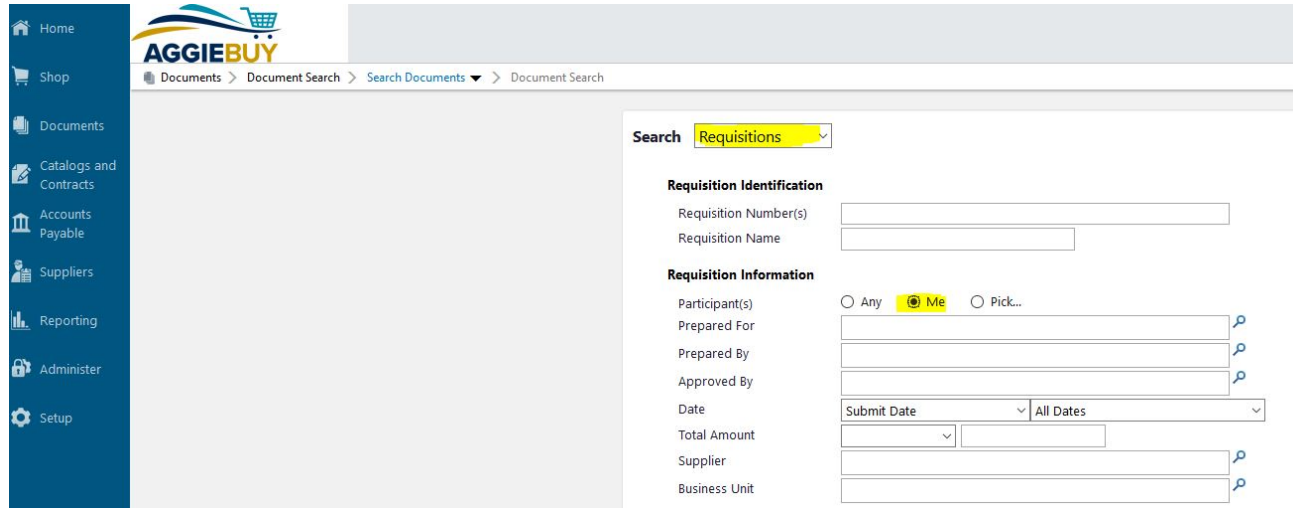
## Viewing Purchase Orders

- AggieBuy Purchase Orders begin with the **UCDAB** prefix; the AggieBuy Requisition number is also included in the results:

✓ <b>UCDAB229089</b> 	Integrated DNA Technologies Inc.	7/16/2019 10:24 AM	120688757
✓ <b>UCDAB229088</b> 	VWR International	7/16/2019 10:20 AM	120589163
✓ <b>UCDAB229087</b> 	UCD Scientific Store	7/16/2019 10:20 AM	120589163
✓ <b>UCDAB229086</b> 	Office Depot	7/16/2019 10:20 AM	120589163
✓ <b>UCDAB229085</b> 	Grainger	7/16/2019 10:20 AM	120589163
✓ <b>UCDAB229084</b> 	Fastenal Company	7/16/2019 10:20 AM	120589163

## Don't See Your Purchase Order?

- On Document Search screen, select **Requisitions**, from the drop-down menu, and in **Participant(s)** field, select **Me**



The screenshot shows the AGGIEBUY web application interface. On the left is a dark blue sidebar with navigation links: Home, Shop, Documents, Catalogs and Contracts, Accounts Payable, Suppliers, Reporting, Administer, and Setup. The main content area has a breadcrumb trail: Documents > Document Search > Search Documents > Document Search. A search bar at the top right of the main area contains the word "Requisitions" in a yellow dropdown menu. Below this, the "Requisition Identification" section includes fields for "Requisition Number(s)" and "Requisition Name". The "Requisition Information" section includes a "Participant(s)" field with radio buttons for "Any", "Me" (which is selected and highlighted in yellow), and "Pick...". Other fields include "Prepared For", "Prepared By", "Approved By", "Date" (with a "Submit Date" dropdown), "Total Amount", "Supplier", and "Business Unit". Each of these fields has a magnifying glass icon to its right, indicating a search function.

## Don't See Purchase Order?

- In search results, any Requisitions with a “chasing arrow” symbol are pending approval; click on the Requisition number, then **PR Approvals** on left menu to see who needs to approve

 <b>120688543</b> 	<a href="#">Amazon.com</a>
 <b>120628195</b> 	<a href="#">Eurofins Genomics LLC</a>
 <b>120622123</b> 	<a href="#">Eurofins Genomics LLC</a>
 <b>120688234</b> 	<a href="#">Office Depot</a>

**Requisition: 120688543**  
ADJYVPT

Status: Pending  
Document Total: 70.76 USD

Requisition >

**PR Approvals**  
Comments  
Attachment Overview  
PO Preview

**PR Approvals**

Show skipped steps ☐

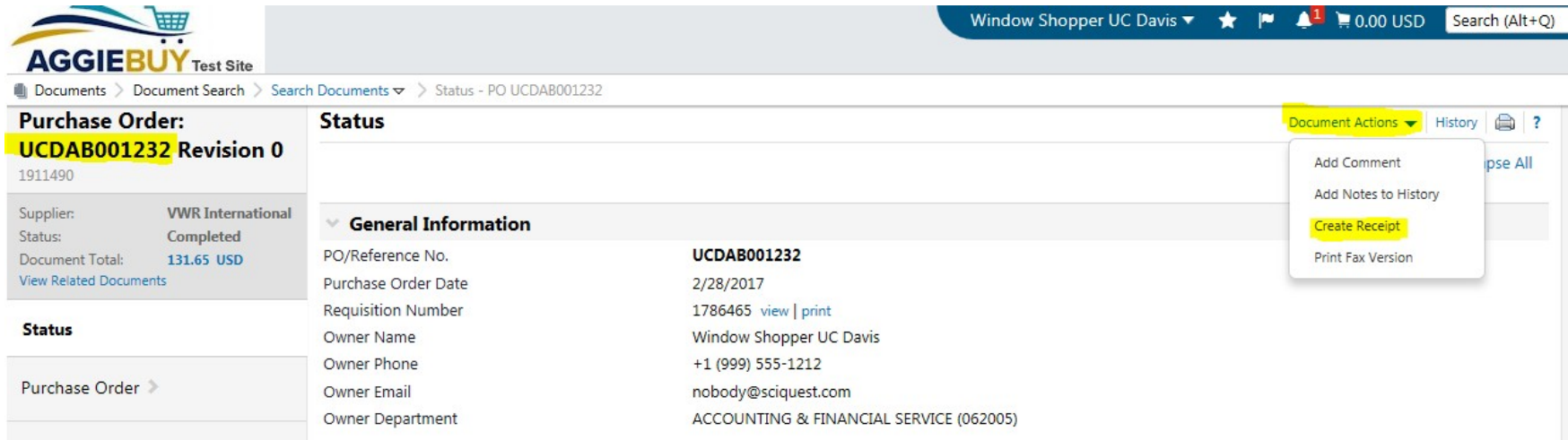
Orientation Horizontal

  
Submitted  
DEANN RONNING  
7/16/2019 10:19 AM

**Fiscal Approval**  
Active   
**View approvers**

## Indicating Receipt of Items (Optional)

- Locate the Purchase Order for which you want to document receipt, open it, click on the **Receipts** link, and under **Document Actions**, select **Create Receipt**.



**AGGIEBUY** Test Site

Window Shopper UC Davis 0.00 USD Search (Alt+Q)

Documents > Document Search > Search Documents > Status - PO UCDAB001232

**Purchase Order:**  
**UCDAB001232** Revision 0  
1911490

Supplier: VWR International  
Status: Completed  
Document Total: 131.65 USD  
[View Related Documents](#)

**Status**

**General Information**

PO/Reference No.	UCDAB001232
Purchase Order Date	2/28/2017
Requisition Number	1786465 <a href="#">view</a>   <a href="#">print</a>
Owner Name	Window Shopper UC Davis
Owner Phone	+1 (999) 555-1212
Owner Email	nobody@sciquest.com
Owner Department	ACCOUNTING & FINANCIAL SERVICE (062005)

**Document Actions**

- Add Comment
- Add Notes to History
- Create Receipt**
- Print Fax Version

[Purchase Order](#)

## AggieBuy Troubleshooting

- **Item(s) Haven't Arrived?**
  - Check **Document Search** section to ensure Purchase Order has been created
  - If Purchase Order has been issued to supplier, check **Supplier Shipping** schedules
  - Contact Supplier



## AggieBuy Troubleshooting

- **Need to Return an Item?**
  - Check the information on the email confirmation for return instructions
  - Contact [Supplier](#)

# AggieBuy Troubleshooting

- **Other Issues?**
  - Check with your supervisor or business office; they may be able to provide additional guidance or instructions
  - The **AggieBuy Help Desk** at [ab-help@ucdavis.edu](mailto:ab-help@ucdavis.edu) can also be a helpful resource