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.
Punch-Out Catalog Searches

- On the Main Dashboard, 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:
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 the person icon in the upper right corner and select **View My Profile**
Set Default Cart Assignee(s)

- On the left, click on **Default User Settings**, and select **Cart Assignees**
Set Default Delivery Address(es)

• On the left, click on Default User Settings, and select Default Addresses. Then, click on the Select Addresses for Profile button.
Set Default Account(s)

- On the left, click on **Default User Settings**. Then, select **Custom Field and Accounting Code Defaults**. Click on **Add** button to locate/add accounts.
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:
Viewing Purchase Orders

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

<table>
<thead>
<tr>
<th>Purchase Order ID</th>
<th>Supplier Name</th>
<th>Date</th>
<th>Time</th>
<th>Requisition Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>UCDAB229089</td>
<td>Integrated DNA Technologies Inc.</td>
<td>7/16/2019</td>
<td>10:24 AM</td>
<td>120688757</td>
</tr>
<tr>
<td>UCDAB229088</td>
<td>VWR International</td>
<td>7/16/2019</td>
<td>10:20 AM</td>
<td>120589163</td>
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<tr>
<td>UCDAB229087</td>
<td>UCD Scientific Store</td>
<td>7/16/2019</td>
<td>10:20 AM</td>
<td>120589163</td>
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<tr>
<td>UCDAB229086</td>
<td>Office Depot</td>
<td>7/16/2019</td>
<td>10:20 AM</td>
<td>120589163</td>
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<tr>
<td>UCDAB229085</td>
<td>Grainger</td>
<td>7/16/2019</td>
<td>10:20 AM</td>
<td>120589163</td>
</tr>
<tr>
<td>UCDAB229084</td>
<td>Fastenal Company</td>
<td>7/16/2019</td>
<td>10:20 AM</td>
<td>120589163</td>
</tr>
</tbody>
</table>
Don’t See Your Purchase Order?

- On Document Search screen, select **Requisitions**, from the drop-down menu, and in **Participant(s)** field, select **Me**
Don’t See Your 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
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 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

  • This concludes this resource. Thanks for your time.