

# 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)
no image available	<b>Pen Paper Mate InkJoy 300 RT Retractable Pens, Med, Blue, Pk/12</b> from Office Depot
	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

Everything

paper

Q

[Advanced Search](#)

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

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

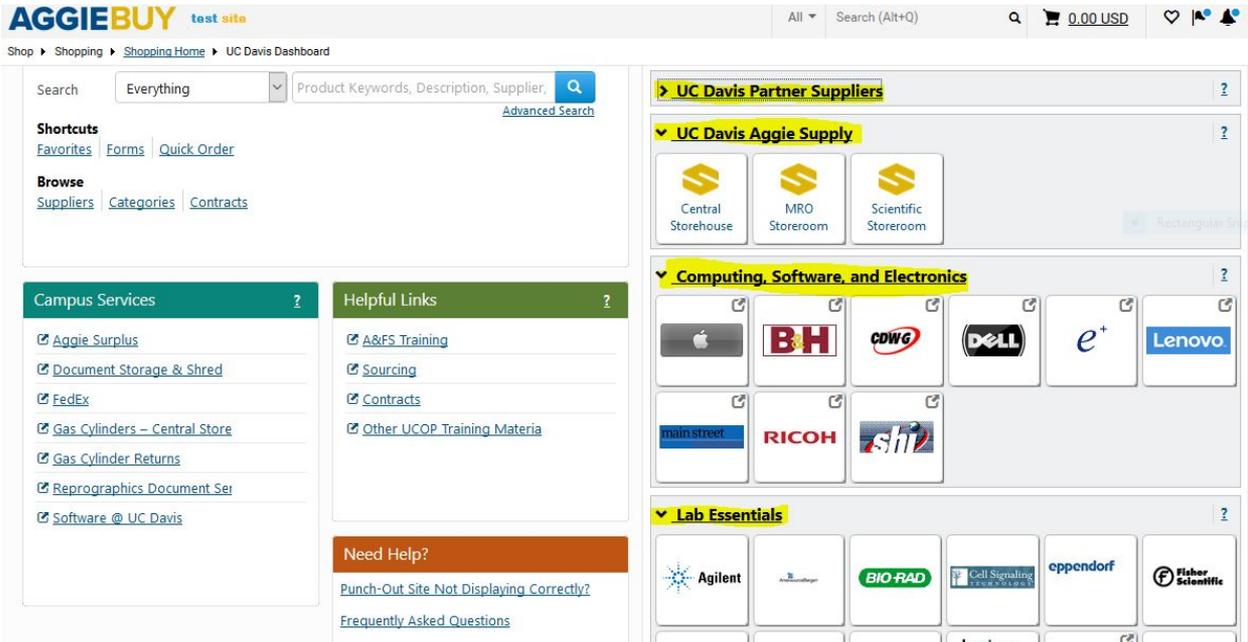
1 Add to Cart  
add favorite | compare

1 Add to Cart  
add favorite | compare

1 Add to Cart  
add favorite | compare

# Punch-Out Catalog Searches

- On the Main Dashboard, click the tile of the supplier for which you wish to shop:



The screenshot shows the AGGIEBUY website dashboard for UC Davis. The top navigation bar includes the AGGIEBUY logo, a search bar with "Search (Alt+Q)", a shopping cart icon showing "0.00 USD", and user account icons. The breadcrumb trail reads "Shop > Shopping > Shopping Home > UC Davis Dashboard".

The main content area is divided into several sections:

- Search:** A search bar with "Everything" selected and a dropdown menu for "Product Keywords, Description, Supplier, Advanced Search".
- Shortcuts:** Links for "Favorites", "Forms", and "Quick Order".
- Browse:** Links for "Suppliers", "Categories", and "Contracts".
- Campus Services:** A list of links including "Aggie Surplus", "Document Storage & Shred", "FedEx", "Gas Cylinders - Central Store", "Gas Cylinder Returns", "Reprographics Document Set", and "Software @ UC Davis".
- Helpful Links:** A list of links including "A&FS Training", "Sourcing", "Contracts", and "Other UCOP Training Material".
- Need Help?:** A section with links for "Punch-Out Site Not Displaying Correctly?" and "Frequently Asked Questions".
- UC Davis Partner Suppliers:** A section with a dropdown arrow and a question mark icon.
- UC Davis Aggie Supply:** A section with a dropdown arrow and a question mark icon, containing three supplier tiles: "Central Storehouse", "MRO Storeroom", and "Scientific Storeroom".
- Computing, Software, and Electronics:** A section with a dropdown arrow and a question mark icon, containing six supplier tiles: "Apple", "B&H", "CDWG", "DELL", "e+", and "Lenovo". Below these are three more tiles: "main stored", "RICOH", and "sh".
- Lab Essentials:** A section with a dropdown arrow and a question mark icon, containing five supplier tiles: "Agilent", "BIO-RAD", "Cell Signaling TECHNOLOGIES", "eppendorf", and "Fisher Scientific".

## What is a Window Shopper?

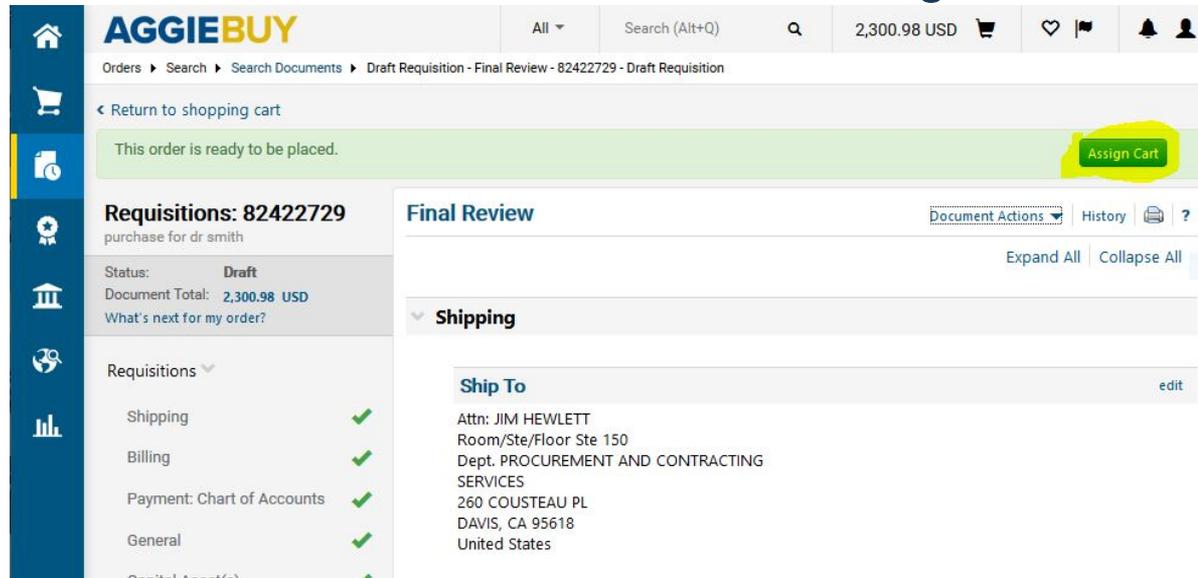
- All active UC Davis employees are assigned **Window Shopper** access
- A **Window Shopper** is an AggieBuy user who can shop hosted and punch-out catalogs, build a shopping cart, but not submit it directly into routing
- A **Window Shopper** assigns their shopping cart to an AggieBuy **Requester**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



The screenshot displays the AGGIEBUY interface for a draft requisition. The top navigation bar includes the AGGIEBUY logo, a search bar, and a cart icon showing a total of 2,300.98 USD. The breadcrumb trail indicates the current location: Orders > Search > Search Documents > Draft Requisition - Final Review - 82422729 - Draft Requisition. A green banner at the top of the main content area states "This order is ready to be placed." and features a yellow "Assign Cart" button. Below this, the "Final Review" section is visible, showing the requisition number 82422729 and a status of "Draft". A table on the left lists various requisition categories with green checkmarks, indicating they are complete. The "Shipping" section is expanded, showing a "Ship To" address for JIM HEWLETT at the University of California, Davis.

**AGGIEBUY** All Search (Alt+Q) 2,300.98 USD

Orders > Search > Search Documents > Draft Requisition - Final Review - 82422729 - Draft Requisition

< Return to shopping cart

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

**Requisitions: 82422729**  
purchase for dr smith

Status: **Draft**  
Document Total: **2,300.98 USD**  
What's next for my order?

Requisitions

Shipping	✓
Billing	✓
Payment: Chart of Accounts	✓
General	✓
Capital Asset(s)	✓

**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?

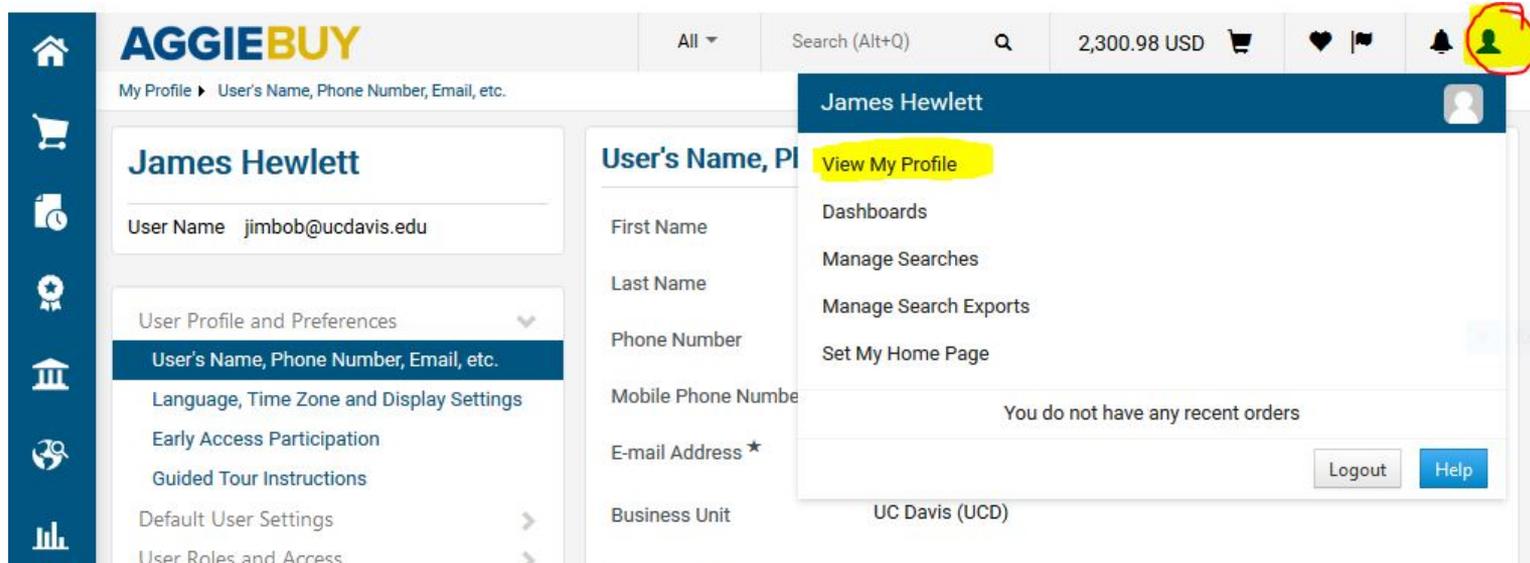
- Contact your supervisor or business office
  - They will let you know if you should enter account information directly or if they prefer that your Cart Assignee do this for you
  - They will also let you know if you should enter any Capital Asset information for items over \$5K, or if the Cart Assignee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

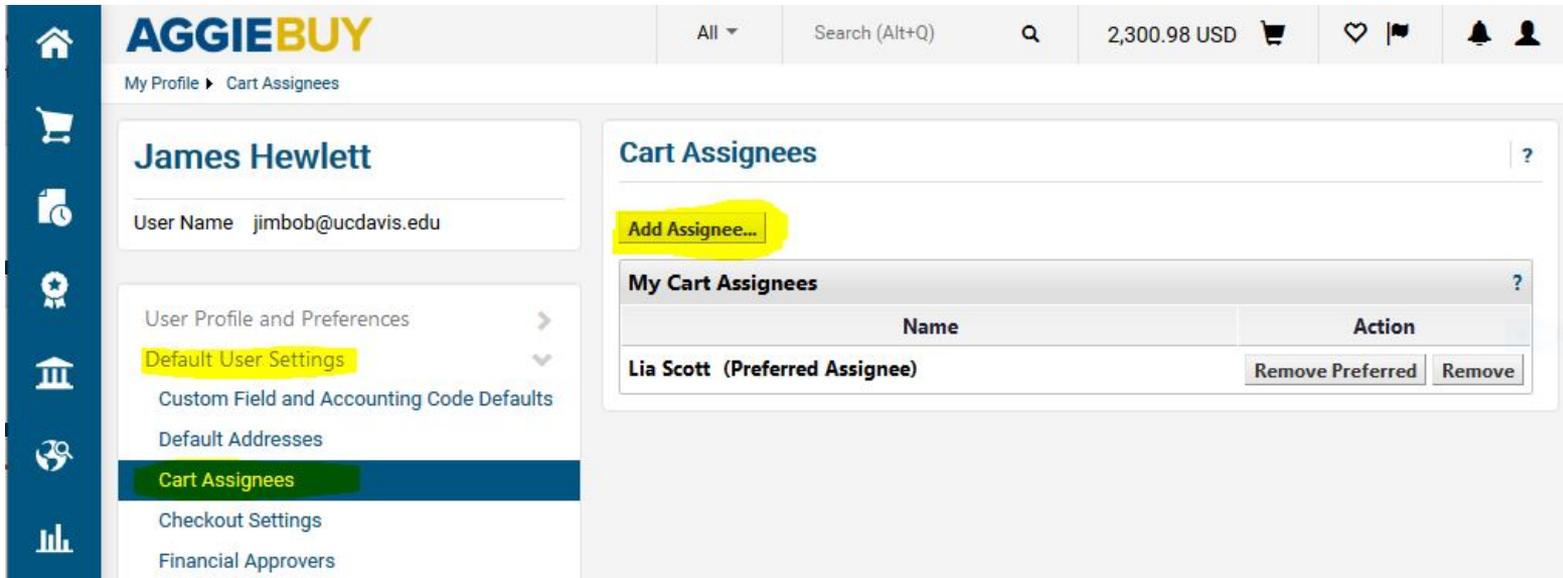
- Click the person icon in the upper right corner and select **View My Profile**



The screenshot shows the AGGIEBUY user interface. At the top right, a person icon is circled in red. A dropdown menu is open, showing the user's name "James Hewlett" and a list of options: "View My Profile" (highlighted in yellow), "Dashboards", "Manage Searches", "Manage Search Exports", and "Set My Home Page". Below the menu, there is a message: "You do not have any recent orders" and buttons for "Logout" and "Help". The user's name "UC Davis (UCD)" is also visible at the bottom of the menu.

## Set Default Cart Assignee(s)

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

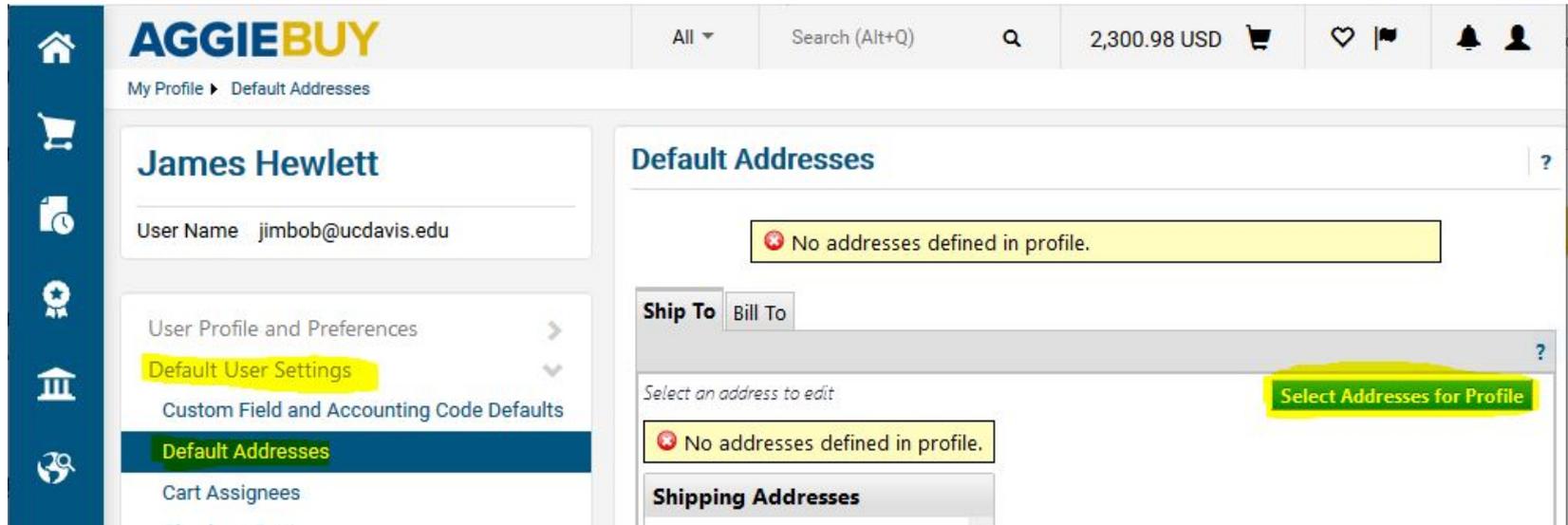


The screenshot shows the AGGIEBUY user interface. At the top, there is a navigation bar with the AGGIEBUY logo, a search bar, and a shopping cart icon showing a total of 2,300.98 USD. Below the navigation bar, the user's profile is displayed for James Hewlett, with the user name jimbob@ucdavis.edu. The left sidebar contains a menu with icons for home, shopping cart, clock, star, building, globe, and bar chart. The 'Default User Settings' menu item is highlighted in yellow, and the 'Cart Assignees' option is selected and highlighted in green. The main content area shows the 'Cart Assignees' section with a yellow 'Add Assignee...' button. Below this is a table titled 'My Cart Assignees' with a header row containing 'Name' and 'Action'. The table lists one assignee, Lia Scott (Preferred Assignee), with 'Remove Preferred' and 'Remove' buttons.

Name	Action
Lia Scott (Preferred Assignee)	<a href="#">Remove Preferred</a> <a href="#">Remove</a>

## Set Default Delivery Address(es)

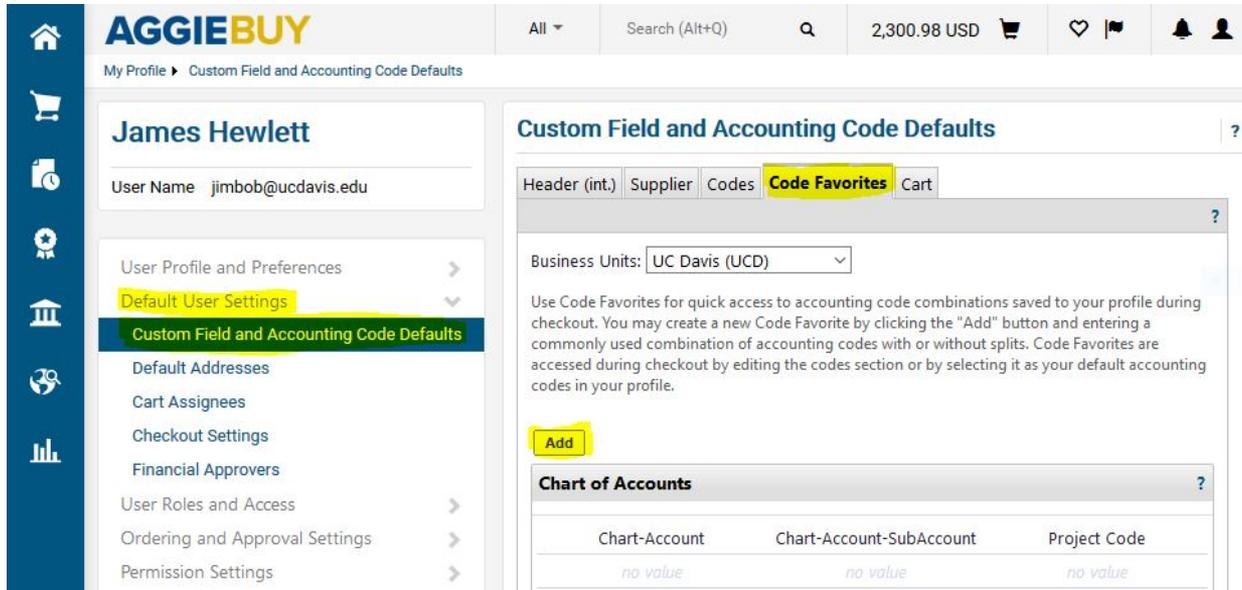
- On the left, click on **Default User Settings**, and select **Default Addresses**. Then, click on the **Select Addresses for Profile** button.



The screenshot shows the AGGIEBUY user interface. On the left is a navigation sidebar with icons for Home, Cart, Profile, and other settings. The main content area is titled "My Profile" and "Default Addresses". The user's name is "James Hewlett" and the email is "jimbob@ucdavis.edu". Under "User Profile and Preferences", "Default User Settings" is highlighted, and "Default Addresses" is selected. The "Default Addresses" section shows a message: "No addresses defined in profile." Below this, there are tabs for "Ship To" and "Bill To". Under the "Ship To" tab, there is another message: "No addresses defined in profile." A button labeled "Select Addresses for Profile" is highlighted in yellow.

# 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

All Search (Alt+Q) 2,300.98 USD

My Profile Custom Field and Accounting Code Defaults

**James Hewlett**

User Name jimbo@ucdavis.edu

User Profile and Preferences

**Default User Settings**

**Custom Field and Accounting Code Defaults**

Default Addresses

Cart Assignees

Checkout Settings

Financial Approvers

User Roles and Access

Ordering and Approval Settings

Permission Settings

**Custom Field and Accounting Code Defaults**

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

Business Units: UC Davis (UCD)

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**

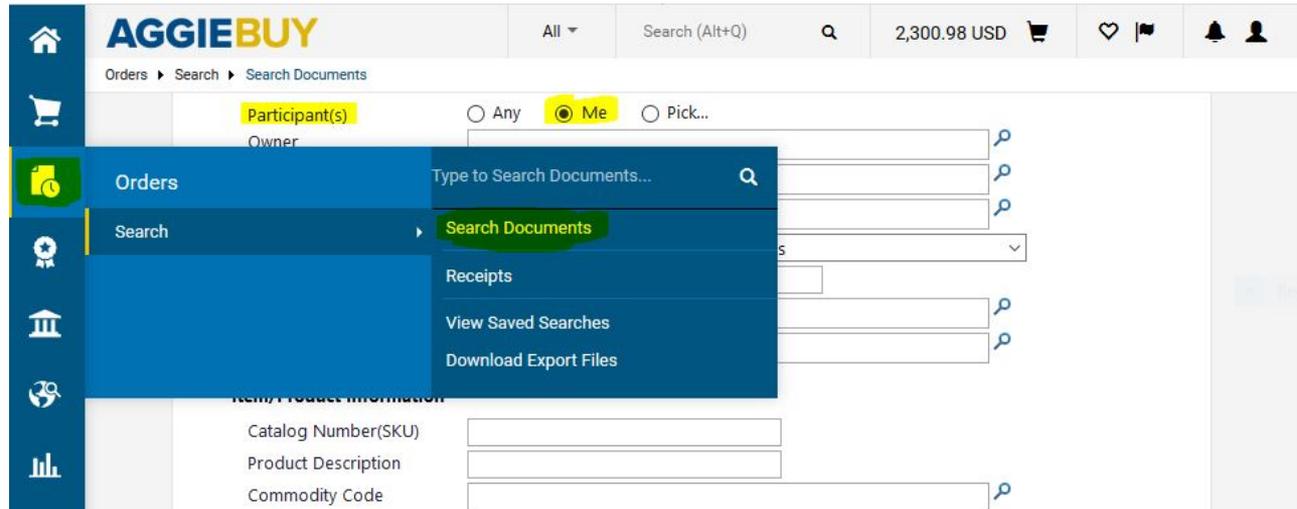
Chart-Account	Chart-Account-SubAccount	Project Code
no value	no value	no value

## 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 displays the AGGIEBUY web application interface. The top navigation bar includes the AGGIEBUY logo, a dropdown menu set to 'All', a search bar with the text 'Search (Alt+Q)', a shopping cart icon showing '2,300.98 USD', and icons for heart, flag, notification, and user profile. The breadcrumb trail reads 'Orders > Search > Search Documents'. The 'Participant(s)' field is highlighted in yellow, with radio buttons for 'Any', 'Me' (selected), and 'Pick...'. The left sidebar menu is open, with 'Orders' highlighted in green. The 'Search' dropdown menu is expanded, showing 'Search Documents' highlighted in green, along with 'Receipts', 'View Saved Searches', and 'Download Export Files'. Below the menu, the 'Item/Product Information' section is visible, with input fields for 'Catalog Number(SKU)', 'Product Description', and 'Commodity Code'.

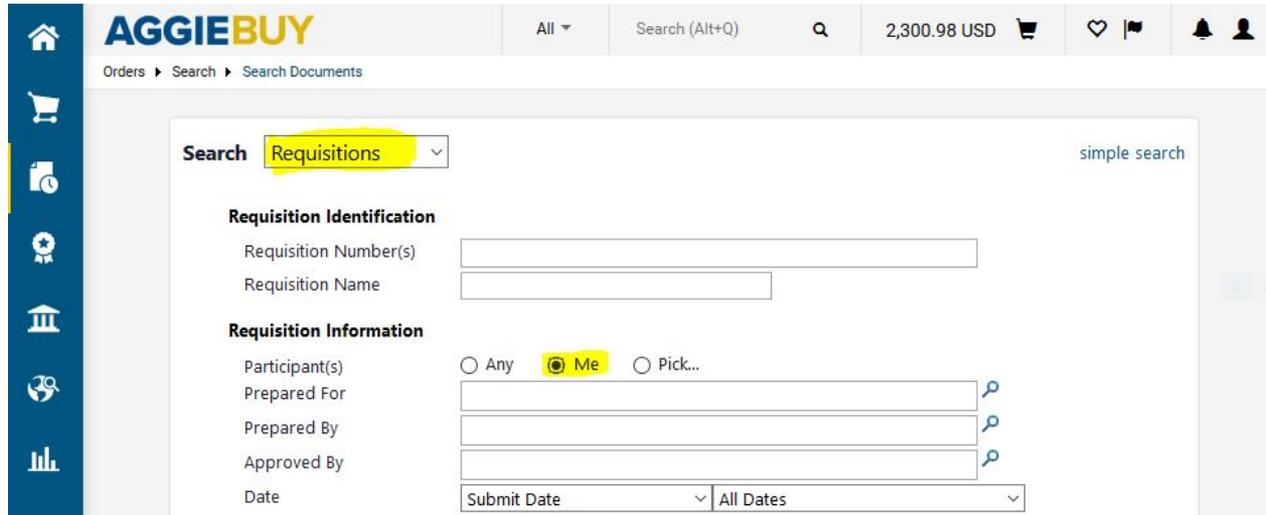
## Viewing Purchase Orders

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

✓ UCDAB229089 	Integrated DNA Technologies Inc.	7/16/2019 10:24 AM	120688757
✓ UCDAB229088 	VWR International	7/16/2019 10:20 AM	120589163
✓ UCDAB229087 	UCD Scientific Store	7/16/2019 10:20 AM	120589163
✓ UCDAB229086 	Office Depot	7/16/2019 10:20 AM	120589163
✓ UCDAB229085 	Grainger	7/16/2019 10:20 AM	120589163
✓ UCDAB229084 	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 Document Search interface. The top navigation bar includes the AGGIEBUY logo, a dropdown menu set to 'All', a search bar with the placeholder 'Search (Alt+Q)', a shopping cart icon showing '2,300.98 USD', and icons for heart, flag, notification, and user profile. Below the navigation bar, the breadcrumb trail reads 'Orders > Search > Search Documents'. The main search area features a 'Search' dropdown menu with 'Requisitions' selected and highlighted in yellow. To the right of the dropdown is a 'simple search' link. Below the search area, there are two sections: 'Requisition Identification' and 'Requisition Information'. The 'Requisition Identification' section has two text input fields for 'Requisition Number(s)' and 'Requisition Name'. The 'Requisition Information' section has a 'Participant(s)' field with three radio button options: 'Any', 'Me' (which is selected and highlighted in yellow), and 'Pick...'. Below this are three text input fields for 'Prepared For', 'Prepared By', and 'Approved By', each with a magnifying glass icon to its right. At the bottom, there is a 'Date' field with a dropdown menu set to 'Submit Date' and another dropdown menu set to 'All Dates'.

## 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

 <b>120688543</b> 	Amazon.com
 <b>120628195</b> 	Eurofins Genomics LLC
 <b>120622123</b> 	Eurofins Genomics LLC
 <b>120688234</b> 	Office Depot

**Requisition: 120688543**  
ADJYVPT

Status: **Pending**  
Document Total: **70.76 USD**

Requisition >

**PR Approvals**

Comments

Attachment Overview

PO Preview

**PR Approvals**

Show skipped steps

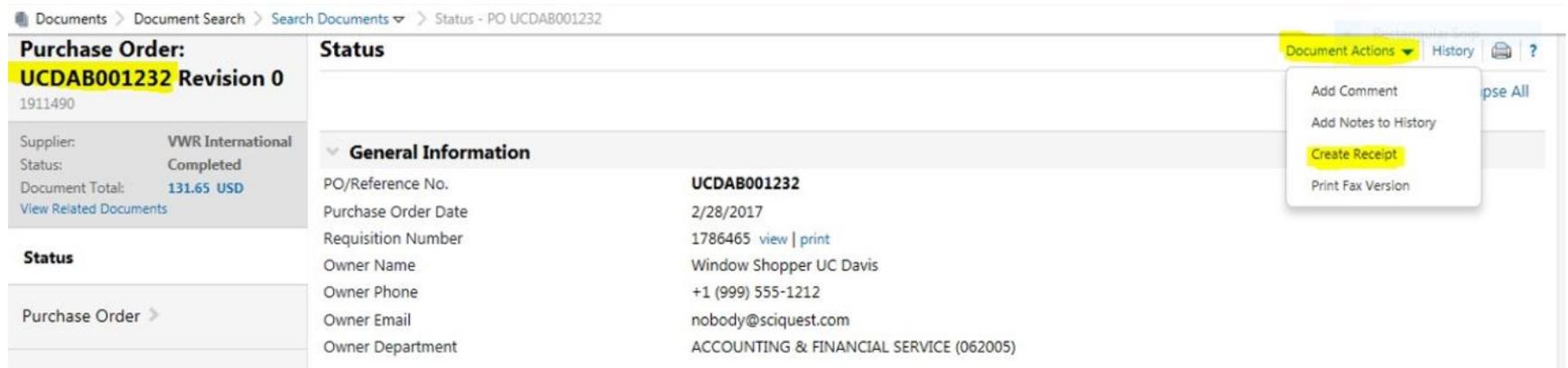
Orientation

 **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**.

A screenshot of a web application interface for a purchase order. The page title is "Documents > Document Search > Search Documents > Status - PO UCDA001232". The main content area is divided into two columns. The left column contains a "Purchase Order" summary for "UCDAB001232 Revision 0" with a value of "1911490". It lists the supplier as "VWR International", status as "Completed", and a total of "131.65 USD". A "Status" section at the bottom of this column has a "Purchase Order" link. The right column is titled "Status" and contains a "General Information" section with details for PO UCDA001232, including the date (2/28/2017), requisition number (1786465), owner name (Window Shopper UC Davis), phone (+1 (999) 555-1212), email (nobody@sciquest.com), and department (ACCOUNTING & FINANCIAL SERVICE (062005)). On the right side of the page, there is a "Document Actions" dropdown menu with options: "Add Comment", "Add Notes to History", "Create Receipt" (highlighted in yellow), and "Print Fax Version".

## 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.