

# 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



**Tape, Paper, Micropore, Porous, Secures ostomy appliances and fre**  
in., 12/Pk., Cs. 10/Pk., 1530-1 120/CS from Fisher Scientific Company

Part Number 19027761 (CS)  
 Manufacturer Info 1530-1 - (Three M Compan  
 Easy Buy Yes

[larger image](#)



**Pen Paper Mate InkJoy 300 RT Retractable, Med, Blk, Pk/12** from OI


Part Number 779964  
 Manufacturer Info 1951260 - (Paper Mate)

[larger image](#)

no image available

**Pen Paper Mate InkJoy 300 RT Retractable Pens, Med, Blue, Pk/12 f**


Part Number 779982  
 Manufacturer Info 1951259 - (Paper Mate)



**Pen, RED, MED, Paper Mate InkJoy 100, Pk/12** from Office Depot

Part Number 706297  
 Manufacturer Info PAP1951255 - (Paper Mate)

[larger image](#)



**Kitchen Paper Towels** from Waxie Sanitary Supply

Part Number 850630  
 Manufacturer Info 566316 - (WAXIE BRAND SB)

[larger image](#)

Product Search ⋮

Simple
Advanced
⋮

✕
🔍

**1.94** USD  
DZ

🛒  [Add to Cart](#) ▼  
[add favorite](#) | [compare](#)




**20.25** USD  
**Free Shipping**  
CS

🛒  [Add to Cart](#) ▼  
[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:

UC Davis Aggie Supply

 Central Storehouse	 Chemistry Store	 Scientific Store	Centrally Funded PPE
Masks PPE Items	Attire PPE Items	Cleaning Supplies PPE Items	Gloves PPE Items
Hand Sanitizer PPE Items			


UC Davis Partner Suppliers

			
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Welcome, HP PU UC AGG BUY United States


Search

Products

 Products

» HP.com Business to Business home » Change my purchase view

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 Taking care of business Order By Item | My Lists


Search by Keyword or Item#

Office Supplies Paper Ink & Toner Breakroom Cleaning Technology Furniture School Supplies Print - Copy Services

Account 84126094 Hi, JAMES HEWLETT Logout


My Account Orders Quick Order My Lists Cart 0 Items

Ready. Set. Print!  
Save on select HP Printers



Hi, James Hewlett  
Logout  
Account 84126094

Proprietary Items

Cart  0 Items

Recently Viewed

You do not have any Recently Viewed

Privacy statement | Limited warranty statement | Link in this site means you accept its terms

## 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:

Requisition ▾ : 82422729 👁️ 🖨️ ?

Summary Taxes/S&H PO Preview Comments 2 Attachments 1 History

**Shipping** ✎ ⋮

**Ship To**

Attn: James Hewlett  
Room 149  
141 Physical Sciences  
Mall  
ONE SHIELDS AVE  
CHEMISTRY  
STOCKROOM  
DAVIS, CA 95616-5270  
United States

**Delivery Options**

**Billing** ✎ ⋮

**Billing**

UC Davis Contracting  
Services  
Invoice Desk  
One Shields Ave  
Davis, CA 95616-5270  
United States

**Payment: C...** ✎ ⋮ ▾

Chart- Account	Chart- Account- SubAccount
3-PPECOVD	<i>no value</i>
Track PPE expenses for campus (69825)	

< >

**Draft**

**Total (94.37 USD)** ▾

Subtotal	87.99
Sales Tax	6.38
Use Tax	0.00
Shipping	0.00
Handling	0.00
	<b>94.37</b>

**Assign Cart**

## 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?

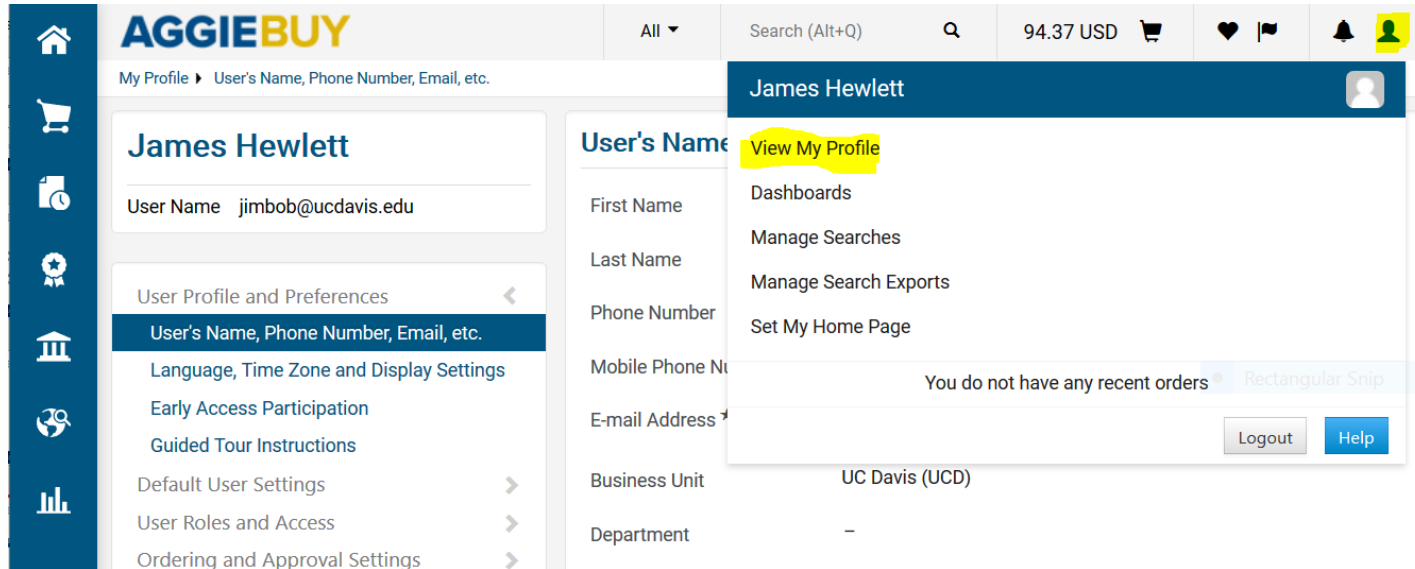
- Contact your supervisor or business office
  - They will let you know if you should enter account information directly or if they prefer that your Cart Assignee do this for you
  - They will also let you know if you should enter any Capital Asset information for items over \$5K, or if the Cart Assignee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

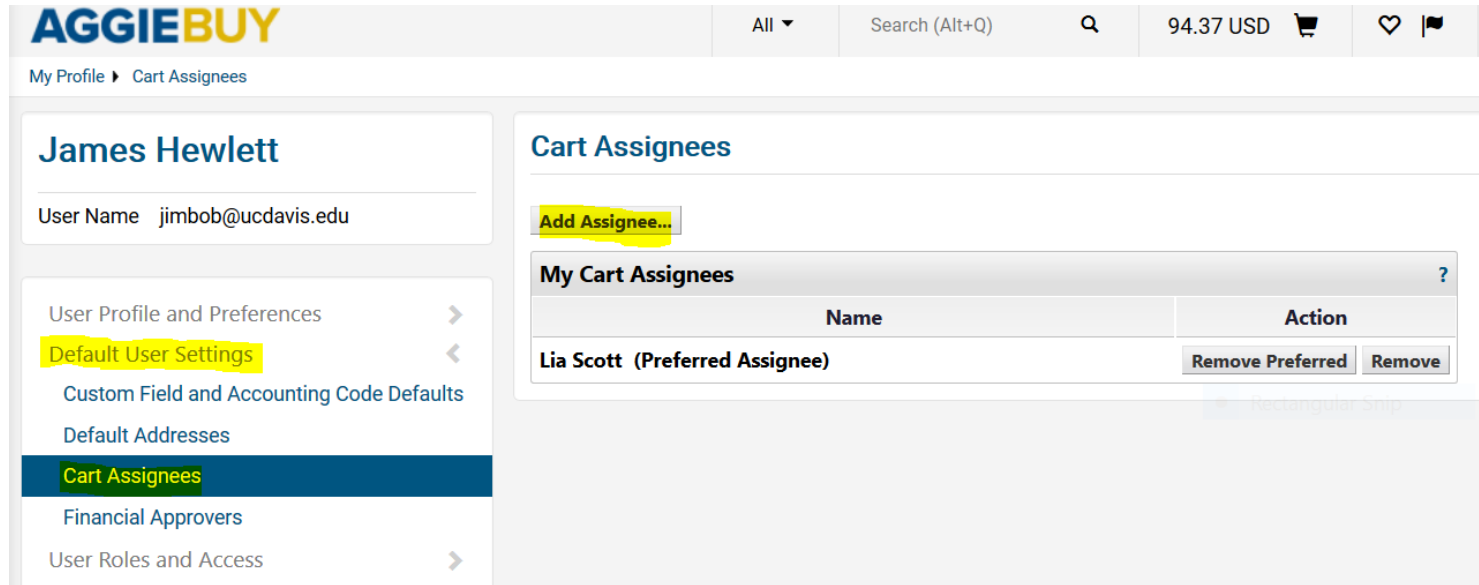
- Click on the person icon in the upper right corner and select **View My Profile**.



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 94.37 USD. Below the navigation bar, the user's profile is displayed. The user's name is James Hewlett, and their email address is jimbo@ucdavis.edu. A dropdown menu is open, showing options for the user's profile, including "View My Profile" (highlighted in yellow), "Dashboards", "Manage Searches", "Manage Search Exports", and "Set My Home Page". The user's business unit is UC Davis (UCD) and their department is listed as "-".

# Set Default Cart Assignee(s)

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

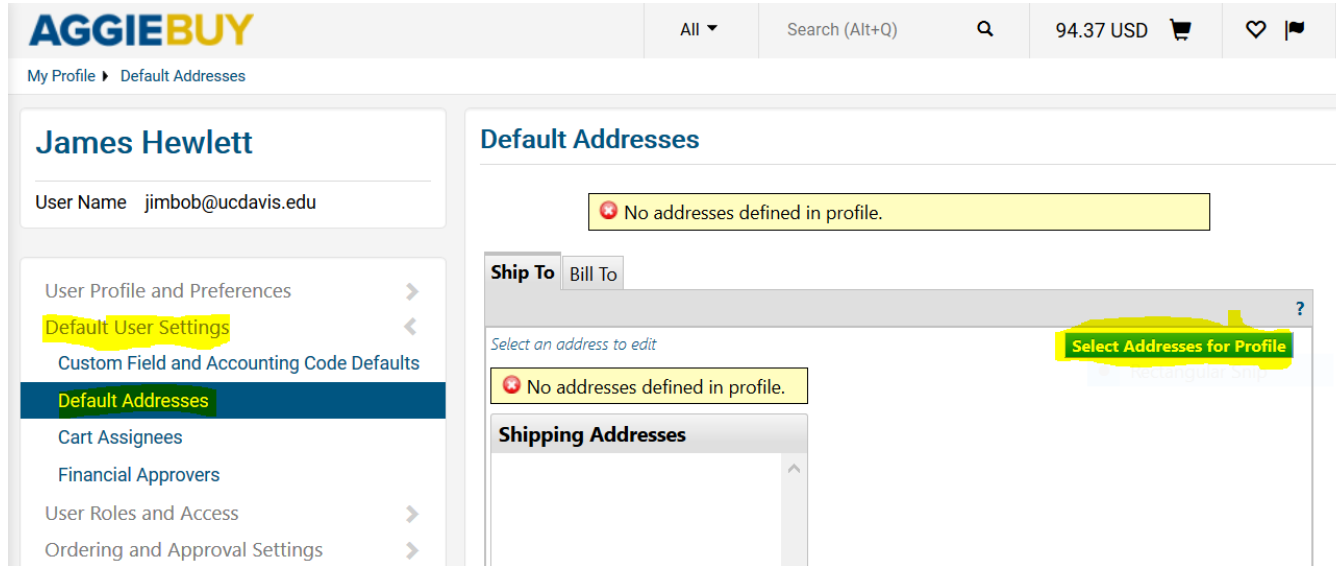


The screenshot shows the AGGIEBUY user interface. At the top, there is a navigation bar with the AGGIEBUY logo, a language dropdown set to 'All', a search bar with the text 'Search (Alt+Q)', a currency indicator '94.37 USD', and icons for a shopping cart, a heart, and a flag. Below the navigation bar, the breadcrumb 'My Profile > Cart Assignees' is visible. On the left side, there is a sidebar menu with the following items: 'James Hewlett' (user name), 'User Name jimbob@ucdavis.edu', 'User Profile and Preferences', '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 contains an 'Add Assignee...' button (highlighted in yellow). Below this is a section titled 'My Cart Assignees' with a help icon. It contains a table with the following data:

Name	Action
Lia Scott (Preferred Assignee)	Remove Preferred Remove

# Set Default Delivery Address(es)

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

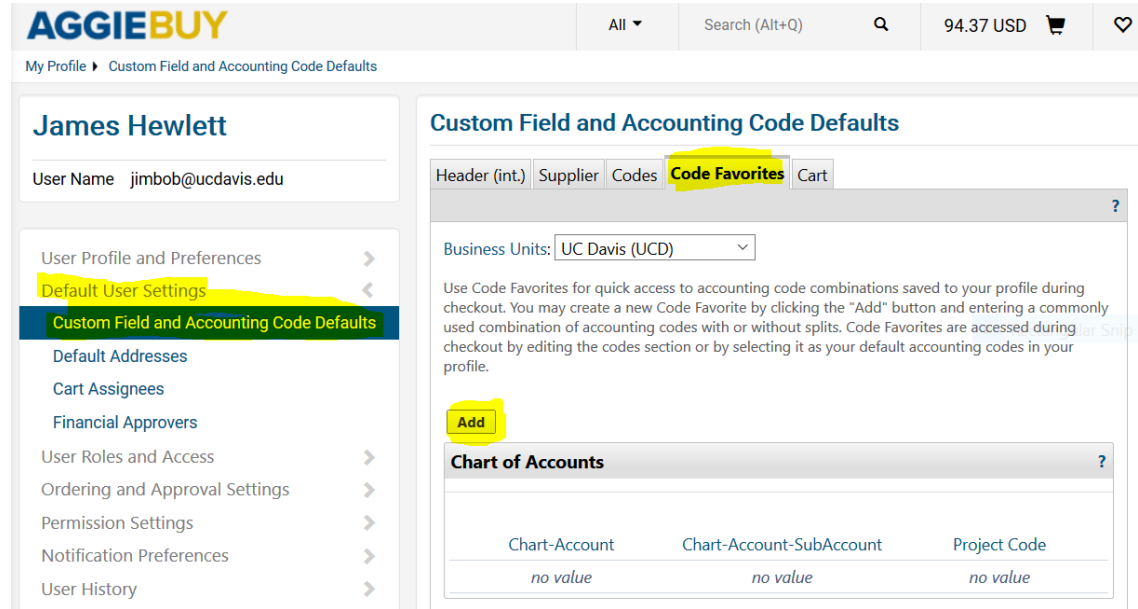


The screenshot shows the AGGIEBUY user profile page for James Hewlett. The left sidebar contains a menu with 'Default User Settings' highlighted in yellow, and 'Default Addresses' selected in blue. The main content area is titled 'Default Addresses' and contains a yellow box with a red error icon and the text 'No addresses defined in profile.' Below this, there are tabs for 'Ship To' and 'Bill To'. The 'Ship To' tab is active, showing a 'Select an address to edit' section with another yellow error box. A yellow callout box with the text 'Select Addresses for Profile' is positioned over the 'Ship To' tab. The bottom of the page features a dark blue footer with the page number '16', the text 'Summer 2021', and the 'UCDAVIS' logo.



# Set Default Account(s)

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



The screenshot shows the user profile page for James Hewlett. The left sidebar contains a list of settings, with 'Custom Field and Accounting Code Defaults' selected. The main content area shows the 'Custom Field and Accounting Code Defaults' configuration for the 'UC Davis (UCD)' business unit. The 'Code Favorites' tab is active, and an 'Add' button is highlighted. Below this is a 'Chart of Accounts' table with three columns: Chart-Account, Chart-Account-SubAccount, and Project Code. All three columns currently show 'no value'.

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

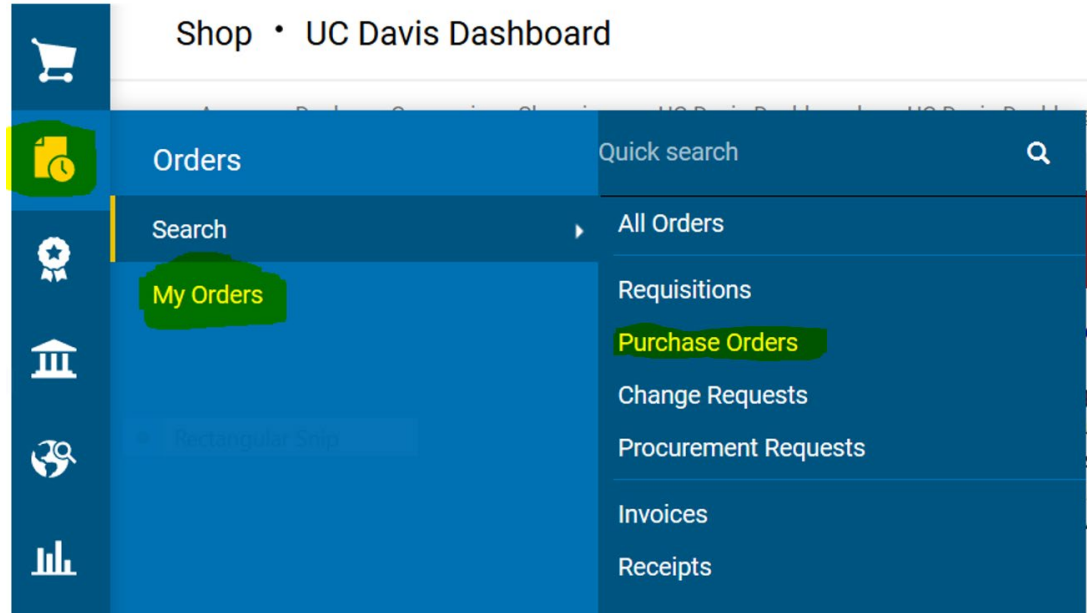
## AggieBuy General Workflow

- **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:

1. Click the **Documents** icon, then
2. Select **My Orders**, and then
3. Select **Purchase Orders** to see the Purchase Orders created from your AggieBuy Requisitions.



## Viewing Purchase Orders

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

PO Number ▼	Supplier	Created Date/Time ▼	PO Status	Requisition Number	PO Owner	Shipment Status	Matching Status	Total Amount ▼
... <a href="#">UCDAB002842T</a>	HD Supply Facilities Maintenance ⓘ	6/4/2021 1:37:12 PM	Completed	<a href="#">3276140</a>	Requester UC Davis	Sent To Supplier	Partially Matched	92.66 USD
... <a href="#">UCDAB002841T</a>	HD Supply Facilities Maintenance ⓘ	6/4/2021 1:26:16 PM	Completed	<a href="#">3276134</a>	Requester UC Davis	Sent To Supplier	Fully Matched	92.66 USD
... <a href="#">UCDAB002840T</a>	HD Supply Facilities Maintenance ⓘ	6/4/2021 12:56:09 PM	Completed	<a href="#">3276041</a>	Requester UC Davis	Sent To Supplier	Partially Matched	92.66 USD

## Indicating Receipt of Items (Optional)

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

Purchase Order • UCDAB002842T Revision 0 ▾

☰ 🖨️ ? 1 of 7 F

[Status](#) [Summary](#) [Revisions](#) **1** [Confirmations](#) [Shipments](#) [Change Requests](#) **Receipts** [Invoices](#) **2** [Comments](#) [Attachments](#) [History](#)

**i** 1 draft receipts exist for this PO.  
[view](#)

Records found: 0

*There are no receipts for this PO.*



**Create Receipt**


[Create Cost Receipt](#)

### Details

[Supplier Status](#)  
[Sent To Supplier](#)  
Supplier

## Don't See Your Purchase Order?

On AggieBuy left menu:

1. Click the **Documents** icon , then
2. Select **My Orders**, and then
3. Select **My Requisitions** to see the Purchase Orders created from your AggieBuy Requisitions.

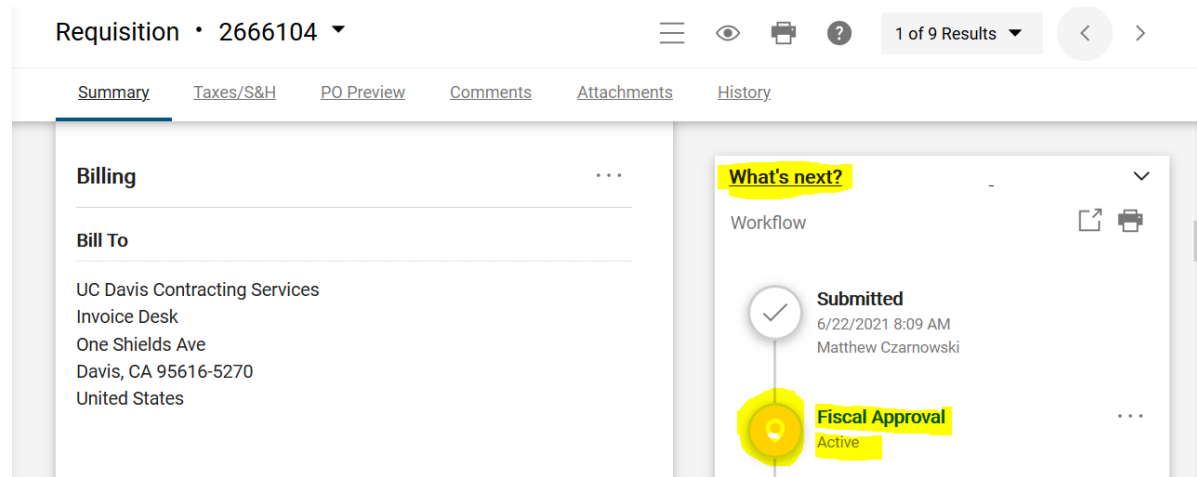
## Don't See Purchase Order?

- In search results, you will see Requisitions that are **Completed** or **Pending** approval; click on the Requisition number to see who still needs to approve pending Reqs.

<input type="checkbox"/>	Requisition Number ▾	Supplier	Requisition Name	Requisition Status ▾	Prepared For	Submitted Date ⌵	Total Amount ▾
<input type="checkbox"/>	<a href="#">2666104</a>	Fisher Scientific Company LLC ⓘ	Test TASKID	<b>Pending</b>	Matthew Czarnowski	6/22/2021 8:09:27 AM	131.92 USD

## Don't See Purchase Order?

- On Requisition, click on **What's Next?** on right menu to see who needs to approve.

A screenshot of a web application interface for a Requisition. The top header shows "Requisition • 2666104" and navigation icons. Below the header are tabs for "Summary", "Taxes/S&H", "PO Preview", "Comments", "Attachments", and "History". The main content area is split into two panels. The left panel, titled "Billing", contains a "Bill To" section with the following text: "UC Davis Contracting Services", "Invoice Desk", "One Shields Ave", "Davis, CA 95616-5270", and "United States". The right panel, titled "What's next?", shows a workflow. It includes a "Submitted" step with a checkmark icon, dated "6/22/2021 8:09 AM" by "Matthew Czarnowski". Below it is a "Fiscal Approval" step with a yellow circular icon containing a question mark and the word "Active".



## 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