

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
larger image	Part Number 19027761 (CS) Manufacturer Info 1530-1 - (Three M Compan Easy Buy Yes
	Pen Paper Mate InkJoy 300 RT Retractable, Med, Blk, Pk/12 from Oil
larger image	Part Number 779964 Manufacturer Info 1951260 - (Paper Mate)
	Pen Paper Mate InkJoy 300 RT Retractable Pens, Med, Blue, Pk/12 f
no image available	Part Number 779982 Manufacturer Info 1951259 - (Paper Mate)
	Pen, RED, MED, Paper Mate InkJoy 100, Pk/12 from Office Depot
larger image	Part Number 706297 Manufacturer Info PAP1951255 - (Paper Mate)
	Kitchen Paper Towels from Waxie Sanitary Supply
larger image	Part Number 850630 Manufacturer Info 566316 - (WAXIE BRAND SB)

Product Search

Simple

Advanced

paper

×

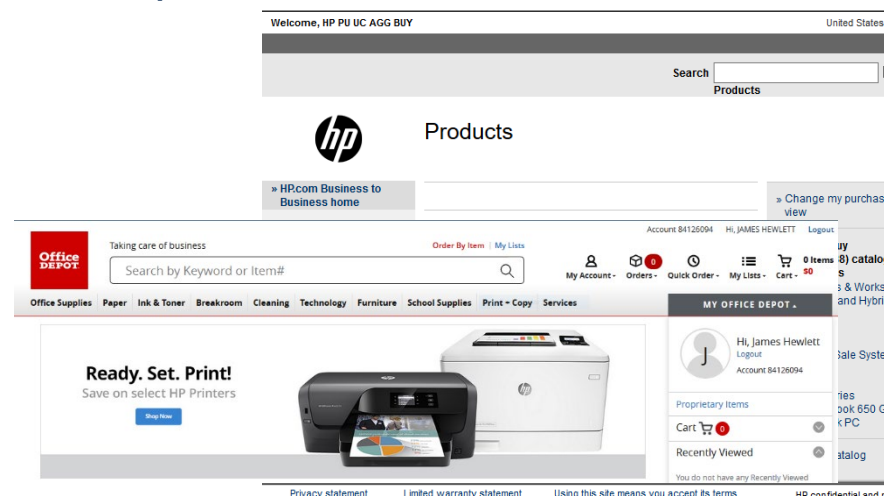
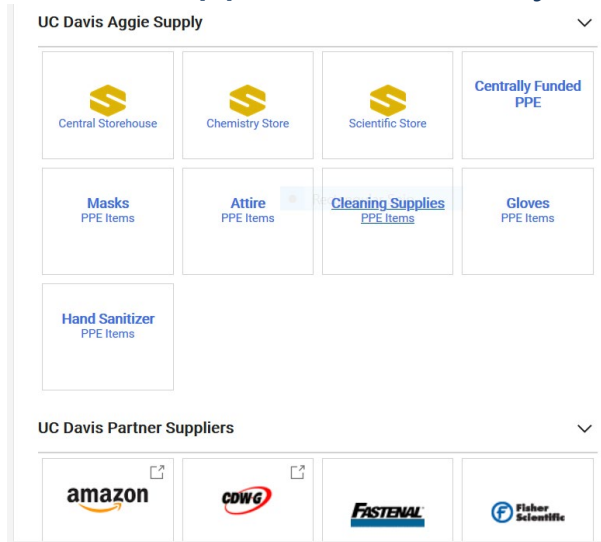
🔍

1.94 USD
DZ
1 [Add to Cart](#)
[add favorite](#) | [compare](#)

20.25 USD
Free Shipping
CS
1 [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:



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 ✎ ⋮	Billing ✎ ⋮	Payment: C... ✎ ⋮ ▼	Draft								
Ship To	Billing	<table><tr><td>Chart- Account</td><td>Chart- Account- SubAccount</td></tr><tr><td colspan="2">3-PPECOVD <i>no value</i></td></tr><tr><td colspan="2">Track PPE expenses for campus (69825)</td></tr><tr><td colspan="2">< ></td></tr></table>	Chart- Account	Chart- Account- SubAccount	3-PPECOVD <i>no value</i>		Track PPE expenses for campus (69825)		< >		Total (94.37 USD) ▼
Chart- Account	Chart- Account- SubAccount										
3-PPECOVD <i>no value</i>											
Track PPE expenses for campus (69825)											
< >											
Attn: James Hewlett Room 149 141 Physical Sciences Mall ONE SHIELDS AVE CHEMISTRY STOCKROOM DAVIS, CA 95616-5270 United States	UC Davis Contracting Services Invoice Desk One Shields Ave Davis, CA 95616-5270 United States		Subtotal 87.99								
			Sales Tax 6.38								
			Use Tax 0.00								
			Shipping 0.00								
			Handling 0.00								
			94.37								
Delivery Options			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?

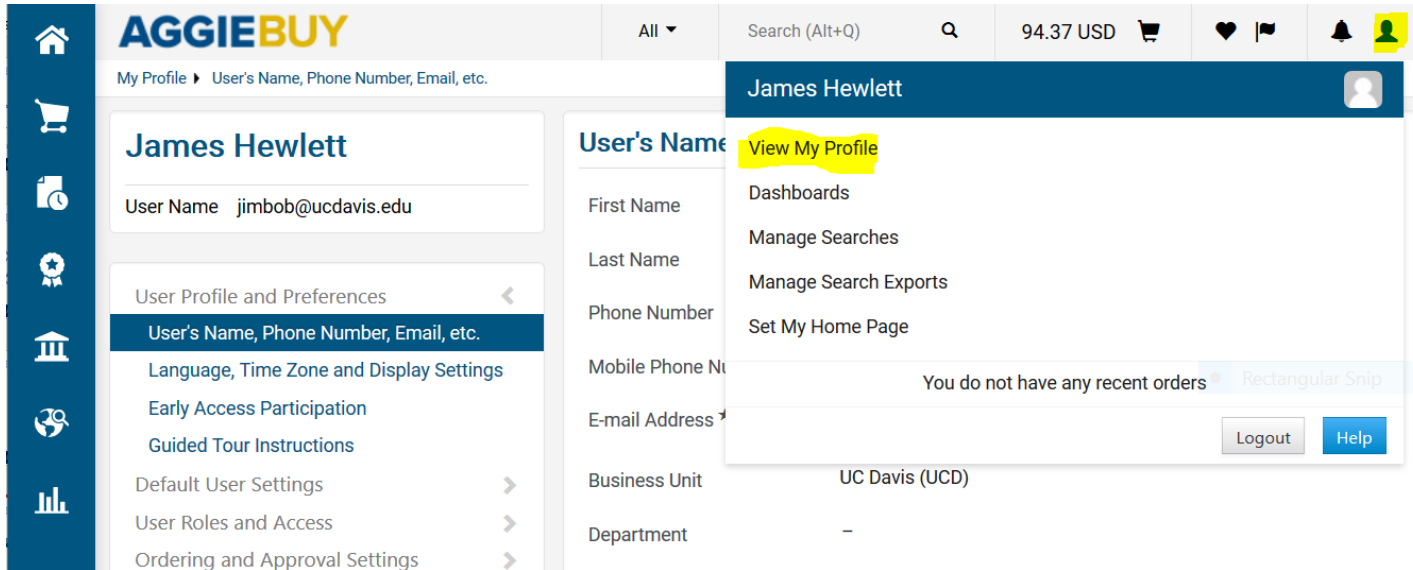
- Contact your supervisor or business office
 - They will let you know if you should enter account information directly or if they prefer that your Cart Assignee do this for you
 - They will also let you know if you should enter any Capital Asset information for items over \$5K, or if the Cart Assignee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

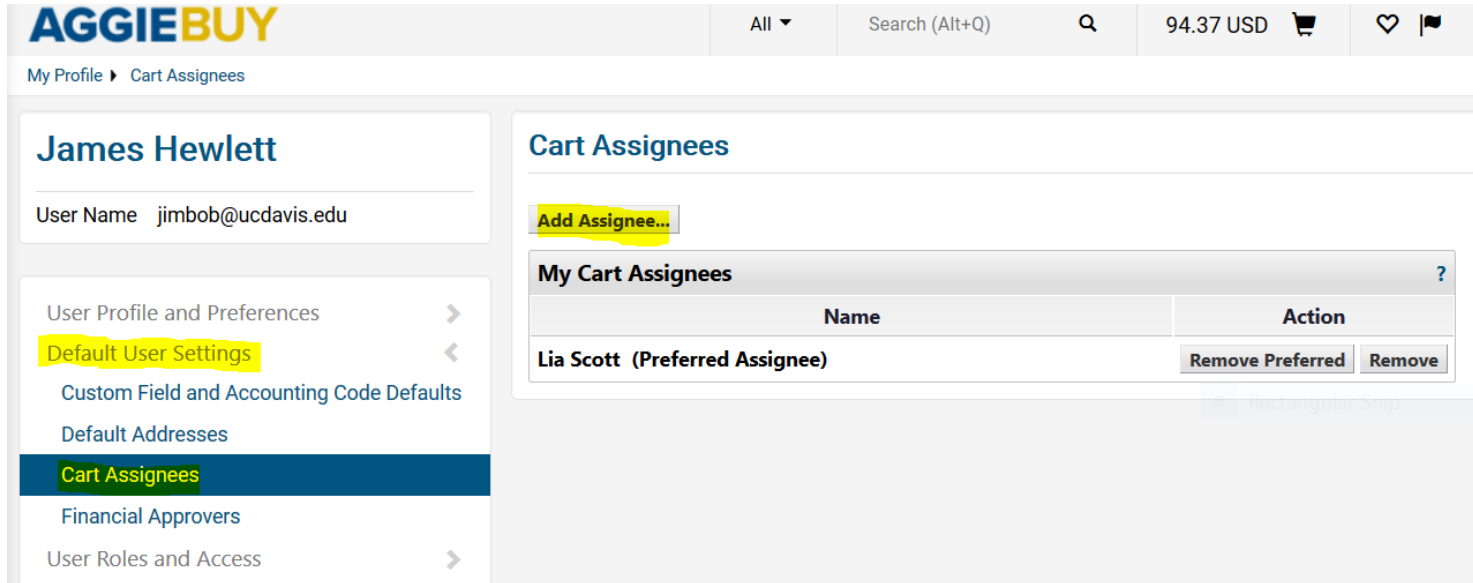
- Click on the person icon in the upper right corner and select **View My Profile**.



The screenshot shows the AGGIEBUY user interface. At the top, there's a navigation bar with the AGGIEBUY logo, a search bar, and a currency display (94.37 USD). Below this, a user profile card for James Hewlett is visible, showing the email address jimbob@ucdavis.edu. A dropdown menu is open, displaying options: View My Profile (highlighted in yellow), Dashboards, Manage Searches, Manage Search Exports, and Set My Home Page. The background shows a sidebar with various icons and a main content area with user profile settings.

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's a navigation bar with the AGGIEBUY logo, a dropdown menu set to 'All', a search bar with the placeholder 'Search (Alt+Q)', and a shopping cart icon showing '94.37 USD'. Below the navigation bar, the breadcrumb 'My Profile > Cart Assignees' is visible. On the left side, there's a sidebar menu with the following items: 'James Hewlett' (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 table. The table has two columns: 'Name' and 'Action'. The table contains one row for 'Lia Scott (Preferred Assignee)' with 'Remove Preferred' and 'Remove' buttons. A faint 'Rectangular Ship' watermark is visible in the background of the main content area.

AGGIEBUY

All Search (Alt+Q) 94.37 USD

My Profile > Cart Assignees

James Hewlett

User Name jimbob@ucdavis.edu

User Profile and Preferences >

Default User Settings <

Custom Field and Accounting Code Defaults

Default Addresses

Cart Assignees

Financial Approvers >

User Roles and Access >

Cart Assignees

Add Assignee...

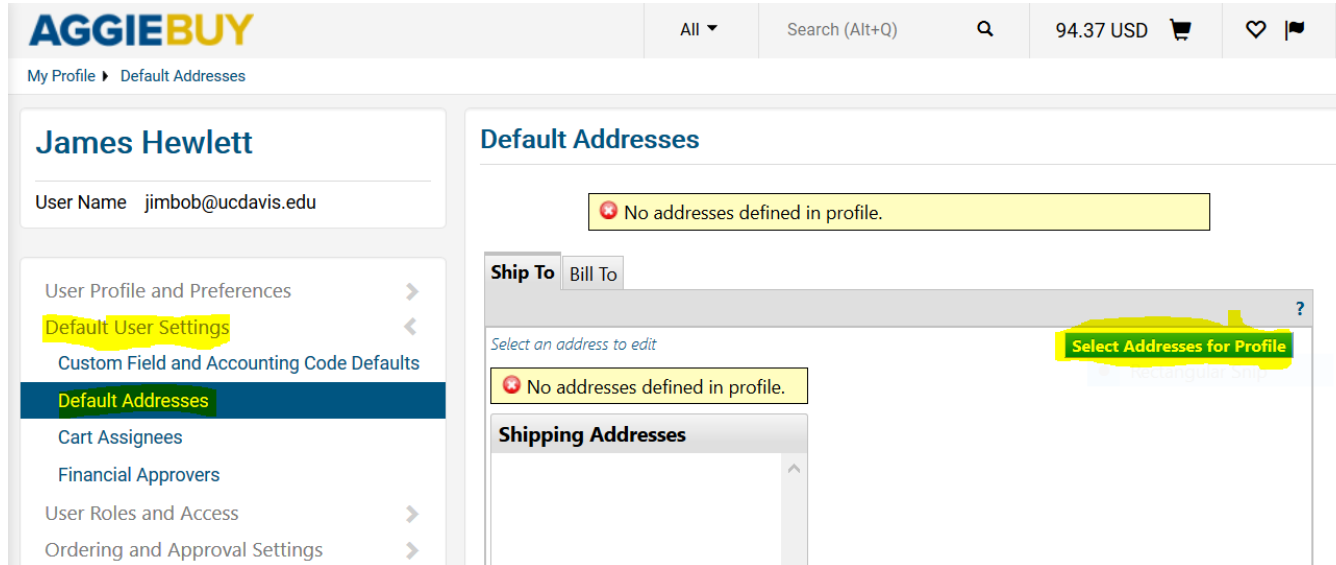
My Cart Assignees ?

Name	Action
Lia Scott (Preferred Assignee)	Remove Preferred Remove

Rectangular Ship

Set Default Delivery Address(es)

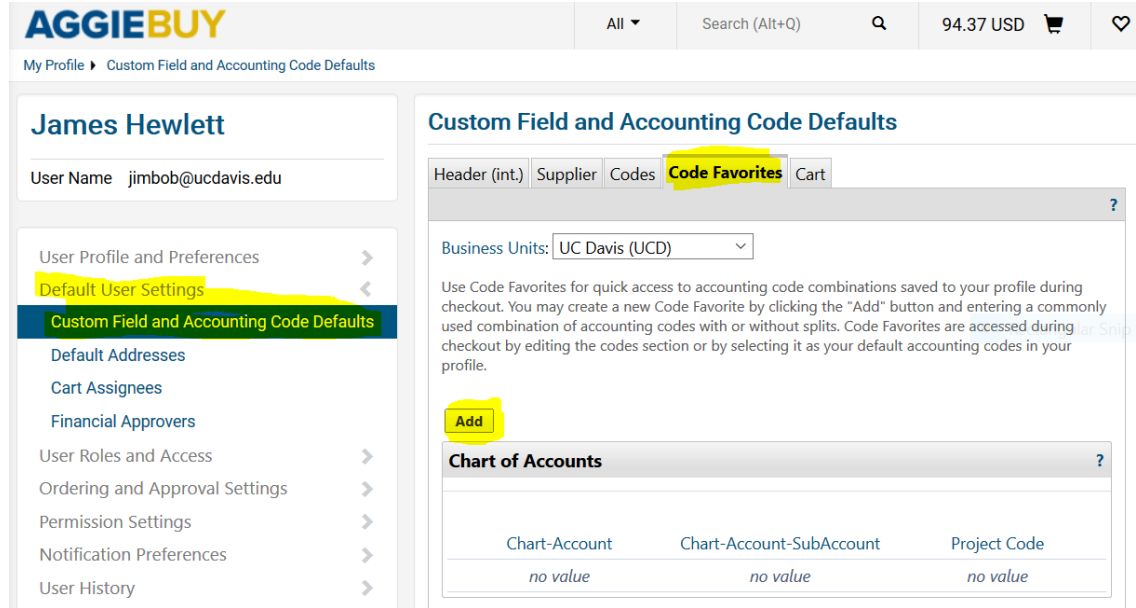
- On the left, click on **Default User Settings**, and select **Default Addresses**



The screenshot shows the AGGIEBUY user interface. At the top, the header includes the AGGIEBUY logo, a navigation menu with 'All', 'Search (Alt+Q)', and a shopping cart icon showing '94.37 USD'. Below the header, the user's profile is displayed for 'James Hewlett' with the email 'jimbob@ucdavis.edu'. A sidebar on the left lists various settings: 'User Profile and Preferences', 'Default User Settings' (highlighted in yellow), 'Custom Field and Accounting Code Defaults', 'Default Addresses' (highlighted in blue), 'Cart Assignees', 'Financial Approvers', 'User Roles and Access', and 'Ordering and Approval Settings'. The main content area is titled 'Default Addresses' and contains a message: 'No addresses defined in profile.' Below this, there are tabs for 'Ship To' and 'Bill To'. A button labeled 'Select Addresses for Profile' is highlighted in yellow. A 'Shipping Addresses' section is also visible at the bottom.

Set Default Account(s)

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



The screenshot shows the AGGIEBUY user interface. On the left, the user profile for James Hewlett is displayed with the email jimbob@ucdavis.edu. A sidebar menu lists various settings, with 'Custom Field and Accounting Code Defaults' highlighted. The main content area is titled 'Custom Field and Accounting Code Defaults' and includes tabs for 'Header (Int.)', 'Supplier', 'Codes', 'Code Favorites', and 'Cart'. The 'Code Favorites' tab is active, showing a 'Business Units' dropdown set to 'UC Davis (UCD)' and an 'Add' button. Below this is a 'Chart of Accounts' table with three columns: 'Chart-Account', 'Chart-Account-SubAccount', and 'Project Code'. The table contains three rows, all with 'no value' in the 'Chart-Account' and 'Chart-Account-SubAccount' columns.

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

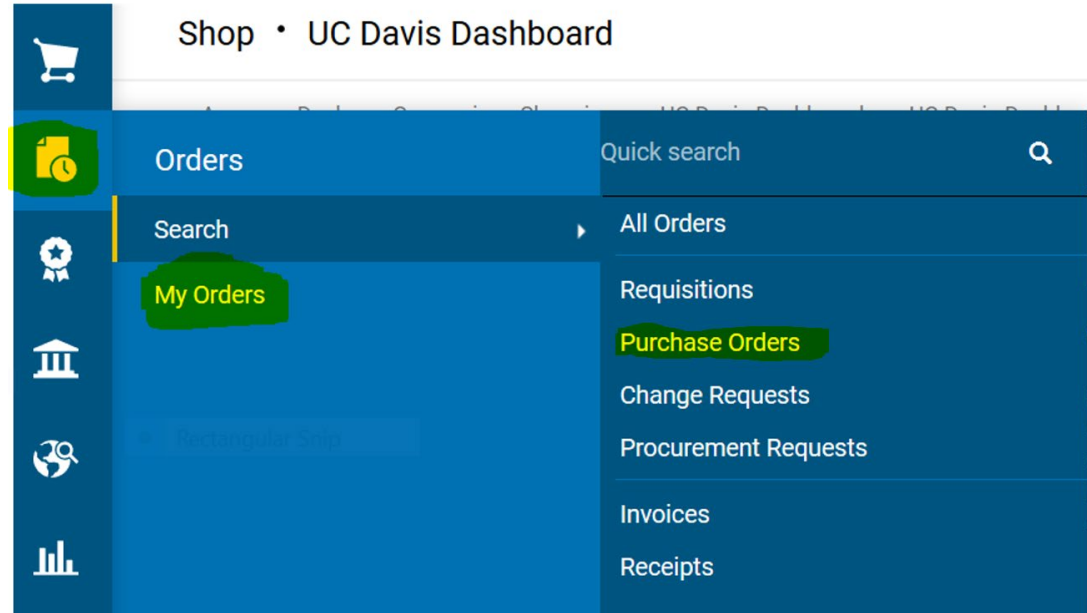
AggieBuy General Workflow

- **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 ▼
...	UCDAB002842T	HD Supply Facilities Maintenance ⓘ	6/4/2021 1:37:12 PM	Completed	3276140	Requester UC Davis	Sent To Supplier	Partially Matched	92.66 USD
...	UCDAB002841T	HD Supply Facilities Maintenance ⓘ	6/4/2021 1:26:16 PM	Completed	3276134	Requester UC Davis	Sent To Supplier	Fully Matched	92.66 USD
...	UCDAB002840T	HD Supply Facilities Maintenance ⓘ	6/4/2021 12:56:09 PM	Completed	3276041	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 • UCDA B002842T 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.

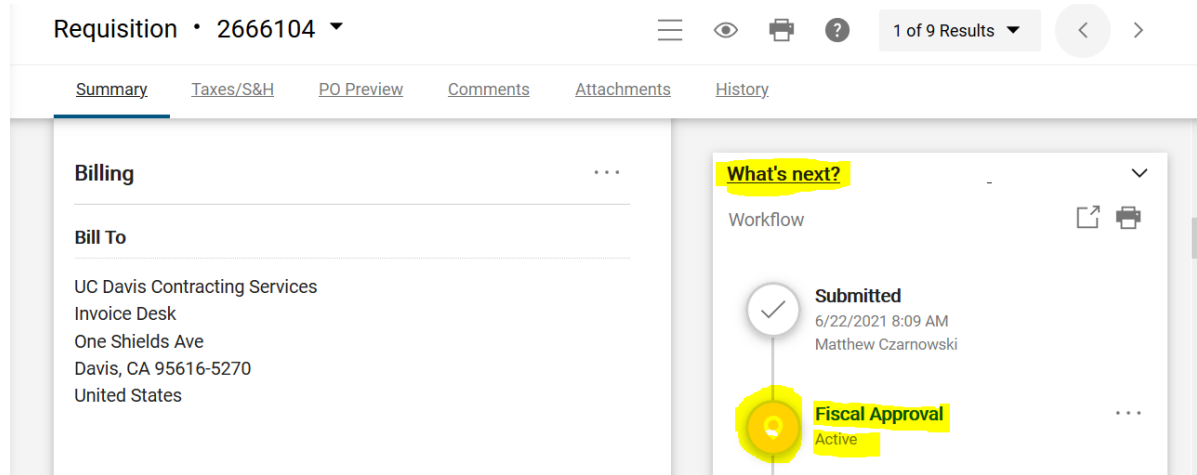
Don't See Purchase Order?

- 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.

☐	Requisition Number ▼	Supplier	Requisition Name	Requisition Status ▼	Prepared For	Submitted Date ▼	Total Amount ▼
☐	2666104	Fisher Scientific Company LLC ⓘ	Test TASKID	Pending	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 bar shows "Requisition • 2666104" with a dropdown arrow, followed by icons for menu, view, print, and help, and a "1 of 9 Results" dropdown. Below this is a navigation bar with tabs: "Summary" (selected), "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 address: "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" section. It includes a "Submitted" status with a checkmark icon, dated "6/22/2021 8:09 AM" by "Matthew Czarnowski". Below this is a "Fiscal Approval" status 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 can also be a helpful resource