

The Next Generation of E-Procurement at UC Davis!

Overview for **Window Shoppers**





Welcome to AggieBuy!

- AggieBuy is the UC Davis e-procurement system for ordering items from many of our 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!

- AggieBuy is the UC Davis e-procurement system for ordering items from many of our university-contracted suppliers:
 - Available for all UC Davis employees and affiliates, with the exception of Hospital employees
 - Hosted and punch-out catalogs are available

Shopping with Hosted and Punch-Out Catalogs

- **Punch-out** catalogs “punch out” to vendor’s website; user shops within website and returns cart to AggieBuy: great for seeing stock availability, configuring items, and for creating and using e-quotes
- **Hosted** catalogs allow searches within AggieBuy itself; great for price and feature comparisons; easier to identify the lowest priced item(s)



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 Info 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



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

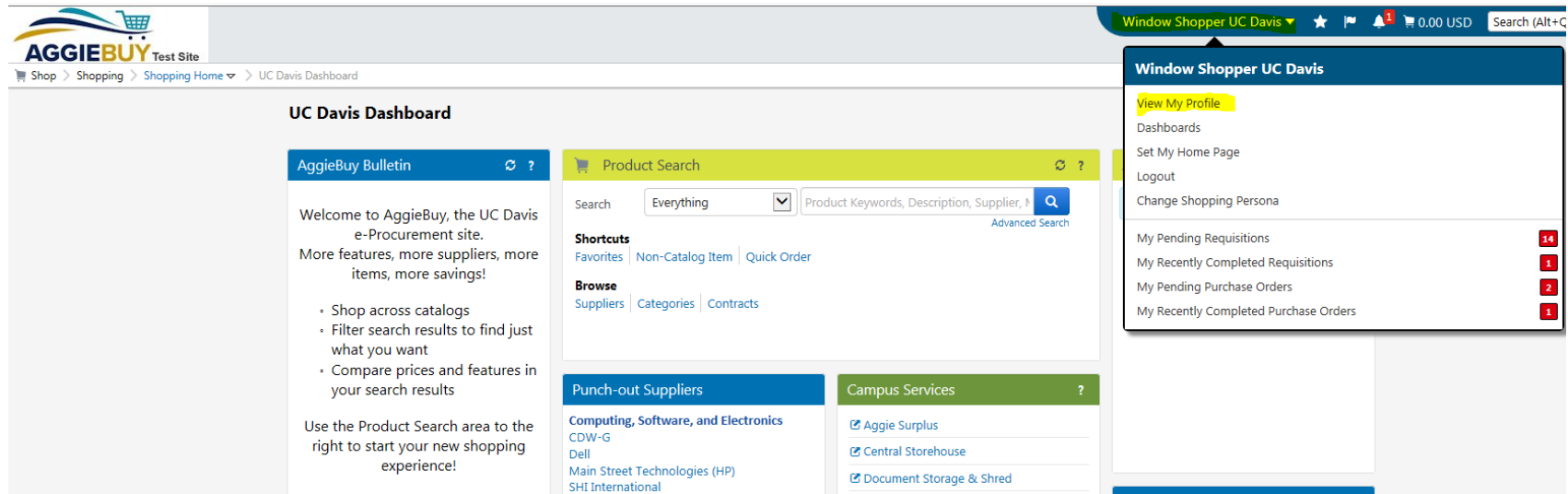


Set Defaults in Your User Profile!

- 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 user's name 'Window Shopper UC Davis' is in the top right corner. A dropdown menu is open, showing the following options:

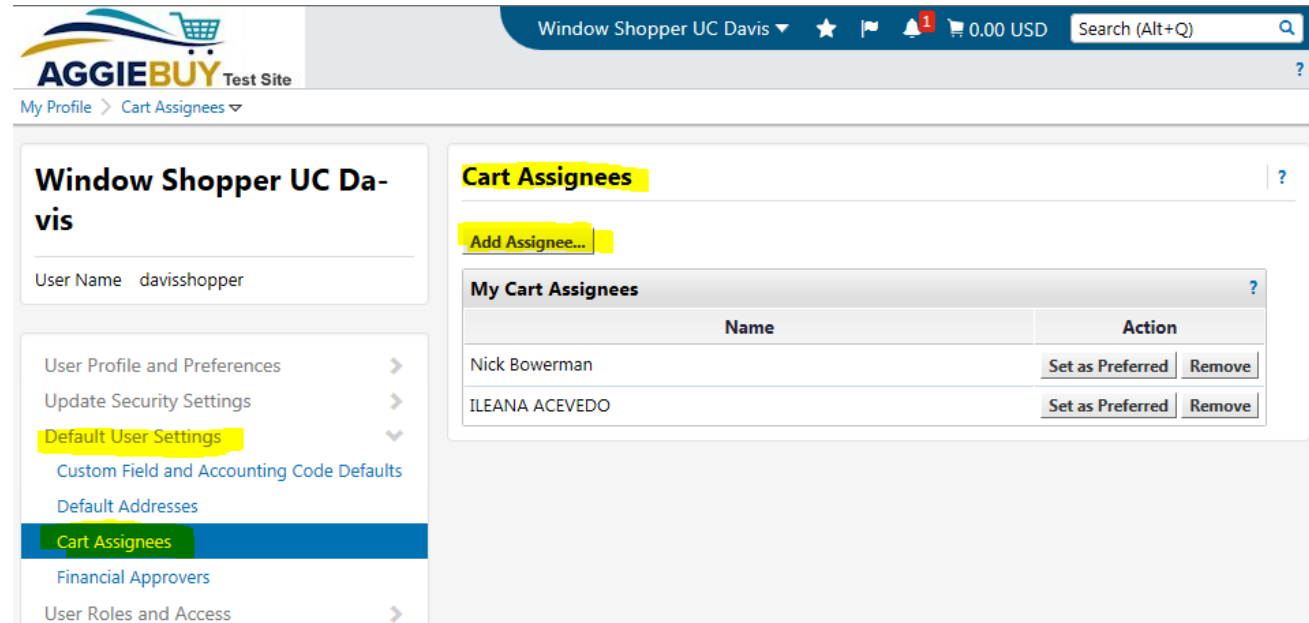
- View My Profile** (highlighted in yellow)
- Dashboards
- Set My Home Page
- Logout
- Change Shopping Persona
- My Pending Requisitions (14)
- My Recently Completed Requisitions (1)
- My Pending Purchase Orders (2)
- My Recently Completed Purchase Orders (1)

The dashboard content includes:

- AggieBuy Bulletin:** Welcome to AggieBuy, the UC Davis e-Procurement site. More features, more suppliers, more items, more savings!
 - Shop across catalogs
 - Filter search results to find just what you want
 - Compare prices and features in your search results
 Use the Product Search area to the right to start your new shopping experience!
- Product Search:** Search Everything. Product Keywords, Description, Supplier, N. Advanced Search. Shortcuts: Favorites, Non-Catalog Item, Quick Order. Browse: Suppliers, Categories, Contracts.
- Punch-out Suppliers:** Computing, Software, and Electronics; CDW-G; Dell; Main Street Technologies (HP); SHI International.
- Campus Services:** Aggie Surplus; Central Storehouse; Document Storage & Shred.

Set Default Cart Assignee(s)!

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

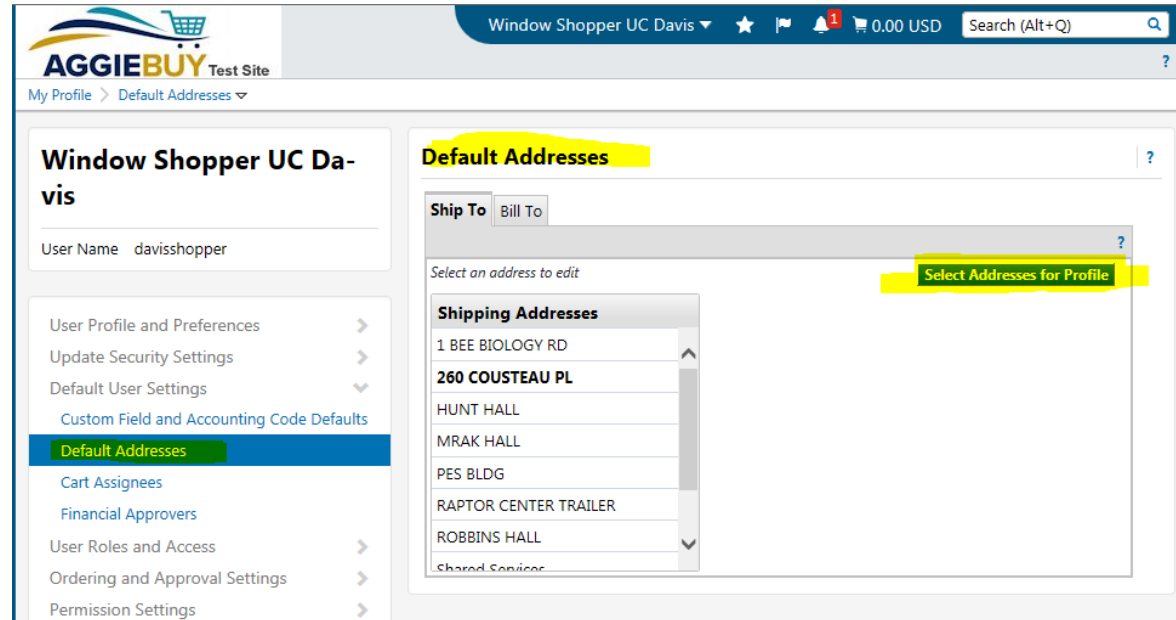


The screenshot shows the user profile page for 'Window Shopper UC Davis'. The left sidebar contains a menu with 'Default User Settings' expanded, and 'Cart Assignees' selected. The main content area shows the 'Cart Assignees' section with an 'Add Assignee...' button and a table of current assignees.

Name	Action
Nick Bowerman	Set as Preferred Remove
ILEANA ACEVEDO	Set as Preferred Remove

Set Default Delivery Address(es)!

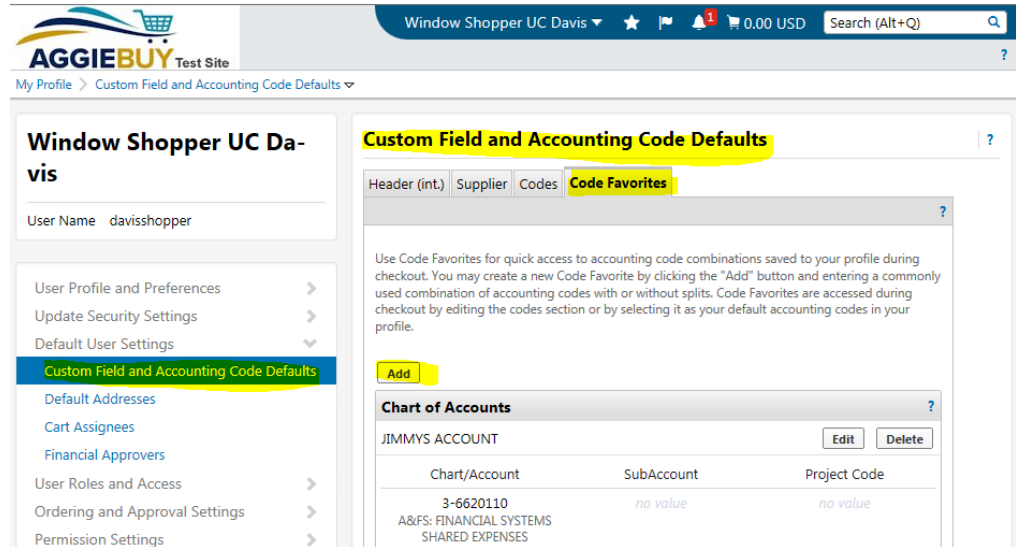
- On the left, click on **Default User Settings**, and select **Default Addresses**



The screenshot shows the AGGIEBUY Test Site user profile page for 'Window Shopper UC Davis'. The user name is 'davisshopper'. The left sidebar contains a menu with 'Default Addresses' highlighted. The main content area is titled 'Default Addresses' and has two tabs: 'Ship To' (selected) and 'Bill To'. Below the tabs, there is a dropdown menu with the text 'Select an address to edit' and a button labeled 'Select Addresses for Profile'. A list of shipping addresses is displayed, including '1 BEE BIOLOGY RD', '260 COUSTEAU PL', 'HUNT HALL', 'MRAK HALL', 'PES BLDG', 'RAPTOR CENTER TRAILER', and 'ROBBINS HALL'.

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 'Window Shopper UC Davis'. The left sidebar contains a menu with 'Custom Field and Accounting Code Defaults' highlighted. The main content area shows the 'Code Favorites' tab selected, with an 'Add' button. Below this is a 'Chart of Accounts' table.

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

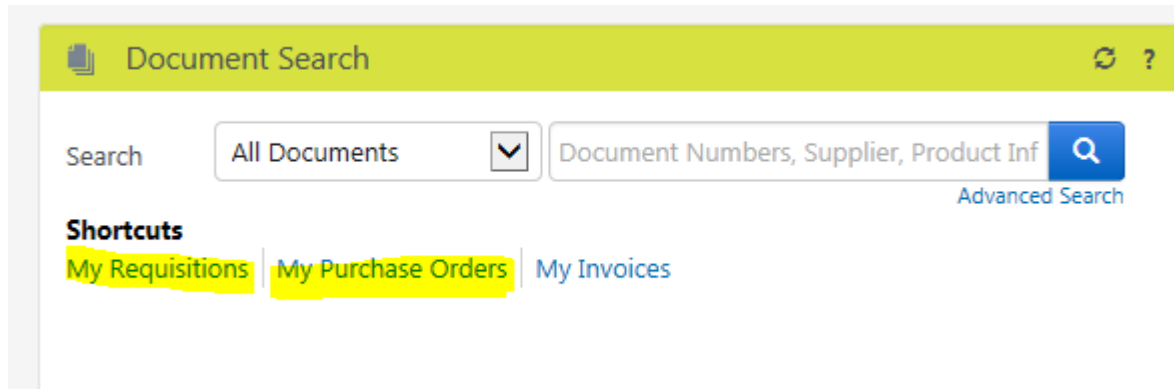


AggieBuy General Workflow

- **Window Shopper** shops AggieBuy 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

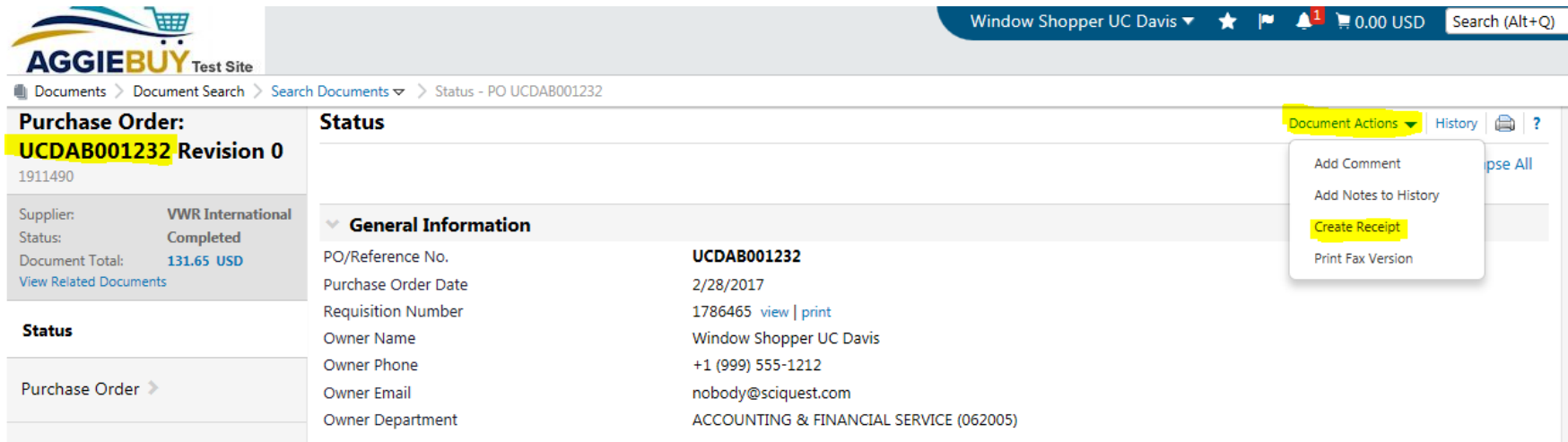
Viewing Requisitions and Purchase Orders

- In **Document Search** section at bottom of home page, click on **My Requisitions** to see the shopping cart information and **My Purchase Orders** to see the POs issued as a result of your approved shopping carts:



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**.



The screenshot shows the AGGIEBUY Test Site interface. At the top, there is a navigation bar with the site logo, a search bar, and user information for 'Window Shopper UC Davis'. Below the navigation bar, the breadcrumb trail reads: Documents > Document Search > Search Documents > Status - PO UCDA001232. The main content area is divided into two columns. The left column displays 'Purchase Order: UCDA001232 Revision 0' with a status of 'Completed' and a total of '131.65 USD'. The right column is titled 'Status' and contains a 'Document Actions' dropdown menu with options: 'Add Comment', 'Add Notes to History', 'Create Receipt' (highlighted), and 'Print Fax Version'. Below the dropdown, a 'General Information' section lists details for the purchase order, including the reference number, date, requisition number, and owner information.

Purchase Order: UCDA001232 Revision 0	
Supplier:	VWR International
Status:	Completed
Document Total:	131.65 USD
View Related Documents	

Status	
<div style="float: right;"> Document Actions History Print ? </div>	
<div style="float: right;"> Add Comment Add Notes to History Create Receipt Print Fax Version </div>	
General Information	
PO/Reference No.	UCDA001232
Purchase Order Date	2/28/2017
Requisition Number	1786465 view print
Owner Name	Window Shopper UC Davis
Owner Phone	+1 (999) 555-1212
Owner Email	nobody@sciquest.com
Owner Department	ACCOUNTING & FINANCIAL SERVICE (062005)

AggieBuy Troubleshooting

- **Item(s) Haven't Arrived?**
 - Check the **My Requisitions** link in the **Document Search** section to ensure all approvals have been secured
 - 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

System Tour



A screenshot of the AggieBuy UC Davis Dashboard. The page has a blue header with the AggieBuy logo and user information (LIA SCOTT, currency: 16,867.76 USD). Below the header is a navigation bar with "Shop", "Shopping", "Shopping Home", and "UC Davis Dashboard". The main content area is titled "UC Davis Dashboard" and contains several sections: "AggieBuy Bulletin" with a welcome message and search tips; "Product Search" with a search bar and filters for shortcuts and browse; "Punch-out Suppliers" listing various categories like Computing, Furniture, and Lab Essentials; "Campus Services" listing services like Aggie Surplus and Document Storage; "Action Items" showing "My Assigned Approvals" (2 items) and "Unassigned Approvals" (1 item); and "Tools & Training" listing training materials.

Thank you for your time today!

