AggieBuy Department Administrator Updates
Best Practices, Shared Favorites, and Shared Carts
Roles Application: Best Practices

• Make sure you set up at least one back-up Dept Admin for each of your HD codes
• Make sure you have at least two users with Requester role access (back-up if someone out of the office)

NOTE: You don’t need to set up a Requester for each of your HD codes; once an AggieBuy user has the Requester role assigned, they can purchase for ANY department, so you don’t need to set them up for each individual HD code
Other Best Practices: Cart Assignees

- Let your Window Shoppers know “who” their Cart Assignees should be; who are the Requesters to whom the Window Shoppers should assign their cart?

- Each Window Shopper in your department can then set up their default assignees in the Cart Assignees section of their AggieBuy user profile
Other Best Practices: Shipping Addresses

- **Nickname** field can be used for quick identification of the address (doesn’t appear on shipping labels)
- Field lengths should be kept to a **minimum**, otherwise important info might not display on shipping label (less than 30 characters per field is recommended)
- Might need to abbreviate person’s name or dept name
Shared Favorites

• “Guide” your users in the right direction by setting up 
  **Shared Favorites** folders

• **Shared Favorites** folders can be set up for the **entire department** or for **specific users** to access

• You can set up Shared Favorites folders and then grant the department **Admin** access so you don’t have to maintain the folder going forward; individual users can set add and delete items from the folder as needed
Tips on Setting Up Shared Favorites

• **Don’t** check the **Allow Entire Organization** box; this is only for central office use

• **Add Access** drop-down should be **Department**

• After selecting department, select **Admin** if you want users to maintain the **Favorites** folder; that way you don’t have to maintain it for them in the future!
Note on Setting Up Shared Favorites

- Access to a **Shared Favorites** folder is automatically granted to ALL Department Administrators.

- In other words, if a **Department Administrator** in **Chemistry** creates a **Shared Favorites** folder, a **Department Administrator** in **History** can also see the **Shared Favorites** folder, but other users in the **History** department won’t be able to see or edit that **Shared Favorites** folder.
Shared Cart User Groups

• Fantastic way to allow **multiple** users in your department the ability to edit a single cart!

• Can reduce the # of redundant orders!

• Great alternative to a **Window Shopper** assigning a cart to a **Requester** and finding out later they are out sick or on vacation
Tips on Setting Up Shared Cart Groups

- Make the name of the group easy to identify for your department users

- **Add Access** will generally be done at the **user** level; each lab or office within your department can be set up with its own users (**Window Shoppers** or **Requesters**) who can share a cart
Sharing Cart With Others

- When viewing a shopping cart, you will see a checkmark with the option to select the group(s) to which you wish to share your cart.

- Check the box next to **Share my cart with others** and click on the drop-down menu to view and select the groups for which you have been granted the ability to assign your cart.
Notifications for Shared Carts

- Email and system notifications will alert the members of that group that a cart has been assigned to them.

- To view the cart, click on the cart icon on the left menu, select **My Carts and Orders**, and click **View Draft Shopping Carts**.
Notifications for Shared Carts

- The **Drafts Shared With Me** section identifies Shopping Carts that have been assigned to you.
- Click on the **Shopping Cart Name** to open the cart.
- You can then edit the cart and proceed to check out the cart.
Help Resources

• Visit our website at http://procurement.ucdavis.edu

• Click on AggieBuy on the right menu.

• Dept Admin resources include instructions on setting up shared favorites folders, creating shared cart user groups, and using the AggieBuy Roles Application.