AggieBuy Town Hall
UC Davis Supply Chain Management
Spring 2018
Today’s Agenda

• Introductions

• Overview of AggieBuy Survey

• Actions We’re Taking Based on Feedback

• Debunking Myths

• Tips and Tricks
Introductions

• Jim Hewlett, Supply Chain Management
• Matt Czarnowski, Supply Chain Management
• Strategic Sourcing
Overview Of AggieBuy Survey

• Online survey conducted in September 2017

• Distributed to all AggieBuy users (Window Shoppers, Requesters, Approvers, Department Administrators)

• Questions included those on system features, functionality, procurement method preference, training, and Help Desk support
Follow-Up on AggieBuy Survey

• Thank you to everyone who took time to participate and provide feedback; over 150 responses

• Your feedback is helping us to improve the AggieBuy experience
  • We’ll discuss changes we’ve made (and are making) to improve AggieBuy
  • We’ll also debunk some “myths” and empower you with information!
## Procurement Methods: Why Employees Use AggieBuy

<table>
<thead>
<tr>
<th>Rank</th>
<th>Reason</th>
<th>Total Responses</th>
<th>Percent of Total Responses</th>
<th>Percent of AggieBuy Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td><strong>AggieBuy, PCARD, KFS</strong></td>
<td>56</td>
<td>15%</td>
<td>23%</td>
</tr>
<tr>
<td>2</td>
<td>Easy, fast, saves time, convenient, and comprehensive ordering platform</td>
<td>49</td>
<td>13%</td>
<td>20%</td>
</tr>
<tr>
<td>3</td>
<td>Dept policy/encouraged/we are supposed to use it first</td>
<td>18</td>
<td>5%</td>
<td>7%</td>
</tr>
<tr>
<td>4</td>
<td>Office supplies primarily ordered through AggieBuy due to convenience/ease/speed/etc</td>
<td>15</td>
<td>4%</td>
<td>6%</td>
</tr>
<tr>
<td>5</td>
<td>Don't have a pcard</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Procurement Methods: Why Employees Use Procurement Card

AggieBuy is sometimes seen as “more expensive” than other options. Keep in mind:

• AggieBuy includes **purchase and payment in one transaction** and **less administrative overhead**.

• AggieBuy is generally less expensive overall than P-Card or KFS Procurement (see next slide).

• If you observe a significantly higher-priced item in AggieBuy, reach out to the Strategic Sourcing unit of Procurement and Contracting Services ([strategicsourcing@ucdavis.edu](mailto:strategicsourcing@ucdavis.edu)).
## Procurement Methods: Price Comparison

### Comparison with Other Options

<table>
<thead>
<tr>
<th>KFS Purchase Order</th>
<th>Procurement Card</th>
<th>AggieBuy</th>
</tr>
</thead>
<tbody>
<tr>
<td>$100-$300 average cost per transaction</td>
<td>$68-75 average cost per transaction</td>
<td>$35 average cost per transaction</td>
</tr>
<tr>
<td>Multiple transactions submitted and approved for procurement and payment</td>
<td>Simple transaction but requires significant administrative oversight</td>
<td>Only one transaction submitted and approved for both procurement and payment processes</td>
</tr>
<tr>
<td>High error rate, minimal detail (dependent upon user)</td>
<td>Little detail for audit or to drive future purchasing agreements</td>
<td>Ultimate level of detail for tracking and negotiations</td>
</tr>
</tbody>
</table>
Procurement Methods: Why Employees Use KFS

We continue to work on adding new suppliers in AggieBuy to ensure that the desired items/suppliers are available:

- Rainin, Sunbelt, Amazon in process of being implemented
- Eppendorf, Office Depot, Aramark, Fastenal, National Gift Card, UC Davis Stores have all been added to AggieBuy since last Fall!
- **Over 30 Suppliers** Now in AggieBuy!
### Favorite Features in AggieBuy

<table>
<thead>
<tr>
<th>Feature</th>
<th>Votes</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ease of use/ordering</td>
<td>21</td>
<td>11%</td>
</tr>
<tr>
<td>Favorites lists/shopping lists</td>
<td>16</td>
<td>8%</td>
</tr>
<tr>
<td>Easy to search for items</td>
<td>14</td>
<td>7%</td>
</tr>
<tr>
<td>Ability to search for specific items from a specific retailer or from</td>
<td>13</td>
<td>7%</td>
</tr>
<tr>
<td>all retailers to find the best deal</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Punch out suppliers</td>
<td>10</td>
<td>5%</td>
</tr>
</tbody>
</table>

**POLL:** What is your Favorite Feature in AggieBuy?
“Areas of Opportunity” in AggieBuy

<table>
<thead>
<tr>
<th>Primary Category</th>
<th>12. Please tell us what pain points you have had with AggieBuy:</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 Search</td>
<td>Searching for items in general is difficult. Easier to search on vendor site and look up item number into AggieBuy</td>
</tr>
<tr>
<td>3 Site Design</td>
<td>Non-intuitive/user friendly</td>
</tr>
<tr>
<td>4 Catalog</td>
<td>Product descriptions are lacking/unclear</td>
</tr>
<tr>
<td>5 Catalog</td>
<td>Product photos are too small, inaccurate, or missing</td>
</tr>
<tr>
<td>6 Catalog</td>
<td>Prices are lower on Amazon/vendor site</td>
</tr>
</tbody>
</table>

We’ll be sharing what we’re doing to address these concerns and also ways to make your product and document searches easier!

**POLL:** What AggieBuy Feature Would You Like to See Improved?
Actions We’ve Already Taken Based on Feedback: Main Dashboard

- Overall Feedback was positive, but some users indicated it was “too cluttered,” hard to read, or difficult to find what they were looking for.

- Font and text size improvements have been made to Main Dashboard for easier readability.
Actions We’re Looking Into Based on Feedback: Main Dashboard

• We’ll look at possibility of creating additional dashboards for **different types of users** (Window Shoppers don’t need to see all the same info as approvers, for example)

• We’ll be setting up user group to get feedback on other ways to improve the Main Dashboard

• Sign up before you leave today!
Actions We’ve Already Taken Based on Feedback: Resolved Dell Punch-Out Site Issues!

• Tested against each Internet browser

• No more error messages or blank screens!

• We think you’ll be thrilled with this!
Actions We Can’t Take At This Time: Link in Email Approver Notification

• Link only works if user is already logged in

• We acknowledge that this is not the “optimal” solution, but it’s due to the configuration with CAS and third-party system

• **Good Solution:** Set up **Approval Code** to Approve Orders via Email! (Available in the **Customer Profile** section)
Survey Also Showed Some Myths Exist…

• The following slides show the “myth” and the “truth”

• We’ll also highlight the correct information in upcoming email messages, on the AggieBuy Main Dashboard, and on our websites:

  • Survey feedback indicates that additional communication never hurts!
Debunking Myths!

• There isn’t training available. FALSE!

  • Online training is available at any time for Window Shoppers, Requesters, and Approvers in the UC Learning Center (LMS)

  • Occasional classroom training is available as well

  • POLL: Do you prefer online training, classroom training, or a combination of the two?
Survey Shows Users Who Completed Training More Satisfied with AggieBuy Experience

Scale of 1 (low) to 5 (high satisfaction)
Survey Shows
Users Who Completed Training More Satisfied with AggieBuy Experience

15/16. If you have attended one of our training sessions, do you feel that the training contributed to your success in using AggieBuy?
Other Actions We’ll Be Taking Based on Feedback

• We’ll be creating mini-recorded sessions (2 to 3 mins) on various AggieBuy functions

• POLL: Any specific topics we should include?
Debunking Myths!

• There isn’t a Help Desk for AggieBuy. **FALSE!**
  
  • Help Desk email [ab-help@ucdavis.edu](mailto:ab-help@ucdavis.edu)
  
  • Help Desk phone (530) 754-1351
  
  • We’ll continue to find additional ways to communicate this info
Top Help Desk Call Topics

- Approving orders: 26, 14%
- Profile setup: 38, 21%
- Searches: 24, 13%
- System access: 36, 20%
- Other: 59, 32%
Reasons for Not Contacting Help Desk

- Found the answer(s) online: 22 (8%)
- Did not know there was a Help Desk: 66 (25%)
- Did not need assistance: 104 (38%)
- Don't like using a Help Desk: 17 (6%)
- Received assistance from co-worker: 64 (23%)
Survey Results with AggieBuy Help Desk Experience (no training completed)
Survey Shows Users Who Completed Training More Satisfied with AggieBuy Help Desk Experience
Debunking Myths!

• You can’t split fund an item in AggieBuy and must create separate order for multiple accounts. FALSE!

• You can enter as many accounts as you wish:

![Chart of Accounts](image_url)
Debunking Myths!

• You can’t purchase capital assets in AggieBuy. **FALSE!**
  
  • Purchases of Capital Assets (items at or above $5K) are ALLOWSED

• Some users think there is a dollar limit for purchases in AggieBuy. **FALSE!**
  
  • Keep in mind that your fiscal officer/department may have their own restrictions
Tips and Tricks: Capital Asset Purchases

• **Capital Asset(s)** section should ONLY be completed for items meeting the Capital Asset Definition:
  
  • Do not use it for optional tracking of items below threshold
  • All fields except UCOP Tag # should be completed unless purchasing item as add-on to existing capital asset

• Requisition containing a capital asset should only contain other items that compose that specific capital asset
Tips and Tricks: Getting List of All Suppliers

Not all users know how to access complete list of AggieBuy Suppliers; Two ways to get this info:

1. List available on [Procurement Website](#), or
2. Click on “Suppliers” in Product Search area of Main Dashboard:
## Tips and Tricks: Getting List of All Suppliers

<table>
<thead>
<tr>
<th>Supplier Name</th>
<th>Type</th>
<th>Preference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agilent Technologies</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Apple Computer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bio-Rad Laboratories</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CDWG</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cell Signaling Technology</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dell</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dharmacon, Inc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Eppendorf North America, Inc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Intercal Corporation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fisher Scientific Company LLC</td>
<td></td>
<td></td>
</tr>
<tr>
<td>GeneSee Scientific</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Granger</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HD Supply Facilities Maintenance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Integrated DNA Technologies Inc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Life Technologies</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MAIN Street Tech (HP)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medline</td>
<td></td>
<td></td>
</tr>
<tr>
<td>National Gift Card Corp</td>
<td></td>
<td></td>
</tr>
<tr>
<td>New England Biolabs, Inc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Office Max</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ParkNet Inc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Qiagen, Inc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>S.I. International Corp.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sigma-Aldrich</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spectrum Chemicals &amp; Laboratory Products</td>
<td></td>
<td></td>
</tr>
<tr>
<td>United Corporate Furnishings (Steelcase Dealer)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>VIT Med Central Services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>VHR International</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Waste Sanitary Supply</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Feedback on Most Requested New Suppliers

<table>
<thead>
<tr>
<th>4. Is there a supplier(s) you regularly purchase from that is not in AggieBuy?</th>
<th>Total - 218</th>
<th>Percent of responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>If so, which one(s)?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Amazon</td>
<td>64</td>
<td>29%</td>
</tr>
<tr>
<td>3. No</td>
<td>34</td>
<td>16%</td>
</tr>
<tr>
<td>4. Office Max</td>
<td>16</td>
<td>7%</td>
</tr>
</tbody>
</table>

- Amazon will be implemented in AggieBuy at a later date. Development work is moving along.

- OfficeMax is NOW Office Depot. Office Depot is now available in AggieBuy as a hosted and punch-out catalog

- **POLL:** What Supplier/Supplier Category Would You Like to See in AggieBuy?
Tips and Tricks: Product Searching

• Too many results? Use the left menu filters to narrow results:
Tips and Tricks: Product Searching

• You can sort when your results are 200 or less. Sort by price, part #, supplier name, size, description (alphabetical), and packaging type:
Product Searching: Improving Descriptions and Photos

• We are working with our implementation team to improve the product descriptions and photos; we appreciate your patience, so you’ll see less of this…

...and more of this…
Tips and Tricks: Product Searching

- Returning Shopper? You can view your past purchasing history in the **Document Search** section of the Main Dashboard…
Tips and Tricks: Product Searching

• …And use a previous **Requisition** as a “template” for a new order:
Tips and Tricks: Product Searching

• For **hosted** catalogs, use the **Favorites** functionality. Click the “Add Favorite” link to save the item for easy access later.

• Give the item a “special nickname” for easy identification.

• Favorites are available from the **Product Search** section.
Tips and Tricks: Cart Functionality

• Each AggieBuy user can create their own cart: *Requester* can submit cart directly into routing, or *Window Shopper* can assign a cart to a Requester to place on their behalf

• **Shared Cart User Group** is another option available to departments:
  
  • Set up by AggieBuy Department Administrator
  • Group can be set up with multiple users;
  • Anyone in the group can create a cart and share with others in the group to edit cart;
  • Any user in the group with *Requester* access can then submit the cart into routing
Tips and Tricks: Item Blocked By Your Organization

• You might be shopping a punch-out site and get the following message. Never fear!
Tips and Tricks: Item Blocked By Your Organization

• Perform a search on the Main Dashboard Product Search…
Tips and Tricks: Notes to All Suppliers

- **Notes to All Suppliers** field can be used to provide additional info
- Not all suppliers have capability to receive notes (as indicated)
Tips and Tricks: Approver Options

• Approvers must first assign Requisition to themselves…
Tips and Tricks: Approver Options

• …Then they can edit, return, reject, or approve Requisition
Tips and Tricks: Receipt/Packing Slip Upload

Search for PO and then select Create Receipt from the Document Actions menu:
Help and resources

• Website:
  • http://procurement.ucdavis.edu (Procurement and Contracting Services)

• Help Desk:
  • ab-help@ucdavis.edu (AggieBuy)
Thanks for coming today!