

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



Introduction

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

7. Please tell us why the chosen answer above is your primary procurement method.		Total - 369	Percent of responses	Percent of AggieBuy - 247
1	AggieBuy, PCARD, KFS			
2	Easy, fast, saves time, convenient, and comprehensive ordering platform	56	15%	23%
3	Dept policy/encouraged/we are supposed to use it first	49	13%	20%
4	Office supplies primarily ordered through AggieBuy due to convenience/ease/speed/etc	18	5%	7%
5	Don't have a pcard	15	4%	6%

Procurement Methods: Why Employees Use Procurement Card

7. Please tell us why the chosen answer above is your primary procurement method.			
	AggieBuy, PCARD, KFS	Total - 369	Percent of responses
1	Items/suppliers are not available in AggieBuy	32	9%
2	Using pcard is easier, convenient, more flexible, and faster than AggieBuy	20	5%
3	AggieBuy is more expensive than other options	8	2%
4			Percent of PCARD - 73

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).

Procurement Methods: Price Comparison

Comparison with Other Options



KFS Purchase Order	Procurement Card	AggieBuy
<ul style="list-style-type: none"> • \$100-\$300 average cost per transaction • Multiple transactions submitted and approved for procurement and payment • High error rate, minimal detail (dependent upon user) 	<ul style="list-style-type: none"> • \$68-75 average cost per transaction • Simple transaction but requires significant administrative oversight • Little detail for audit or to drive future purchasing agreements 	<ul style="list-style-type: none"> • \$35 average cost per transaction • Only one transaction submitted and approved for both procurement and payment processes • Ultimate level of detail for tracking and negotiations

Procurement Methods: Why Employees Use KFS

7. Please tell us why the chosen answer above is your primary procurement method.		Total - 369	Percent of responses	Percent of KFS - 49
1	AggieBuy, PCARD, KFS			
2	Required vendors are not in AggieBuy	7	2%	14%
3	Items are not available in AggieBuy	5	1%	10%
4	Majority of items are not on AggieBuy	3	1%	6%

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

Ease of use/ordering	21	11%
Favorites lists/shopping lists	16	8%
Easy to search for items	14	7%
Ability to search for specific items from a specific retailer or from all retailers to find the best price	13	7%
Punch out suppliers	10	5%

POLL: What is your Favorite Feature in AggieBuy?

“Areas of Opportunity” in AggieBuy

1	Primary Category	12. Please tell us what pain points you have had with AggieBuy:	Total - 273	Percent of responses
2	Search	Searching for items in general is difficult. Easier to search on vendor site and look up item number into AggieBuy	47	17%
3	Site Design	Non-intuitive/user friendly	29	11%
4	Catalog	Product descriptions are lacking/unclear	19	7%
5	Catalog	Product photos are too small, inaccurate, or missing	17	6%
6	Catalog	Prices are lower on Amazon/vendor site	14	5%

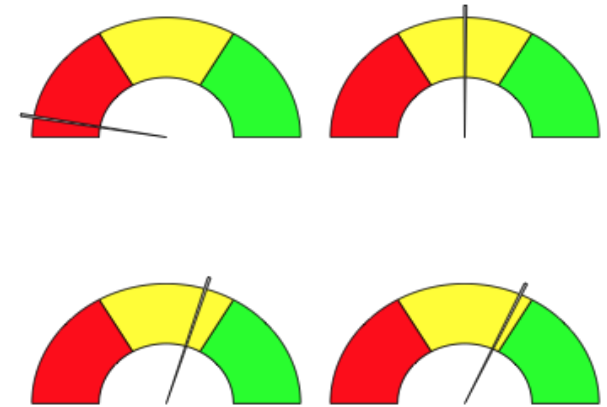
We’ll be sharing what we’re doing to address these concerns and also ways to make your product and document searches easier!

POLL: What AggieBuy Feature Would You Like to See Improved?



Actions We've Already Taken Based on Feedback: Main Dashboard

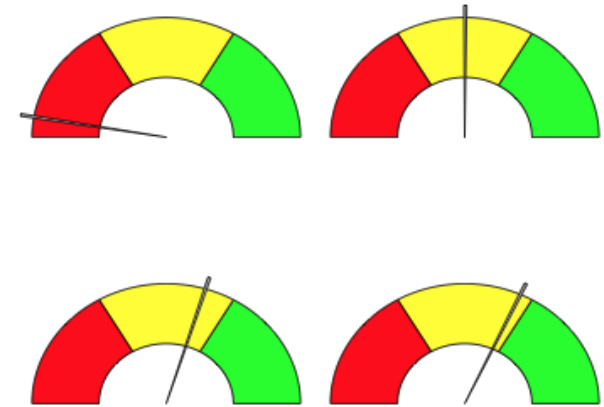
- Overall Feedback was positive, but some users indicated it was “too cluttered,” hard to read, or difficult to find what they were looking for
- Font and text size improvements have been made to **Main Dashboard** for easier readability





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!



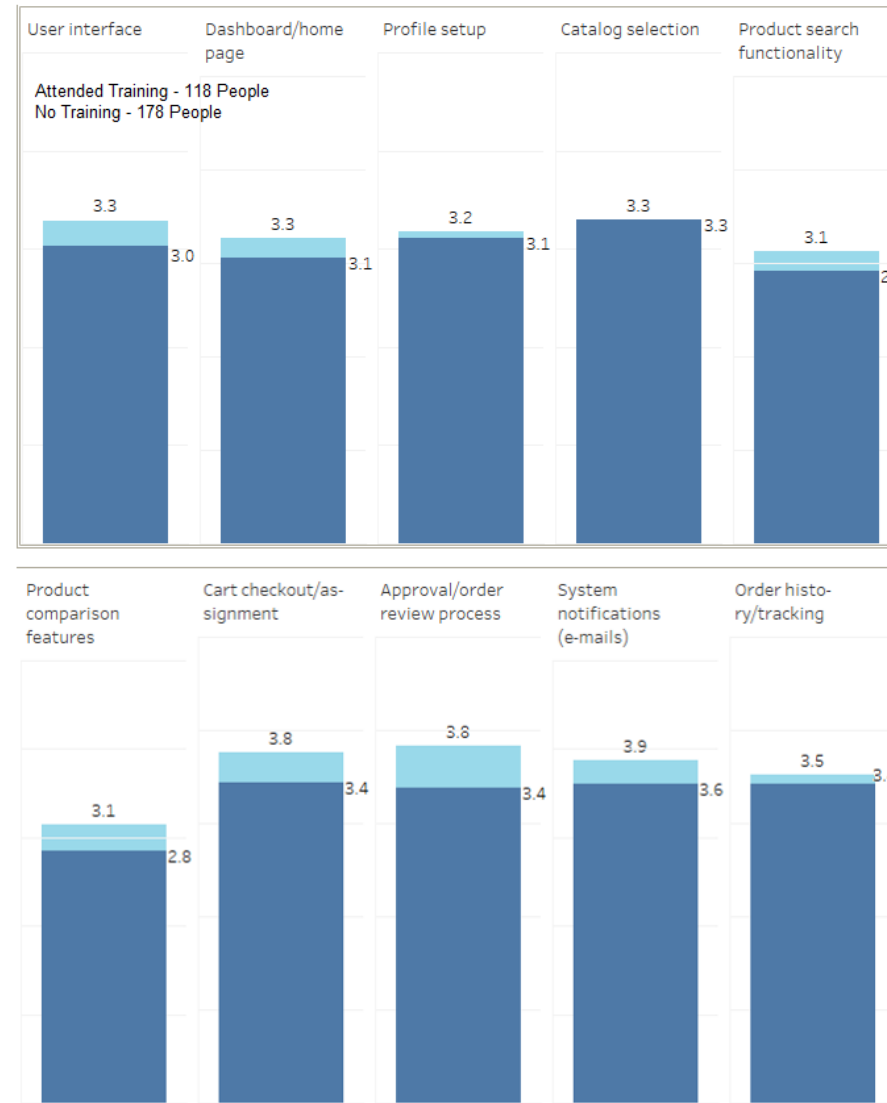


Debunking Myths!

- 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?

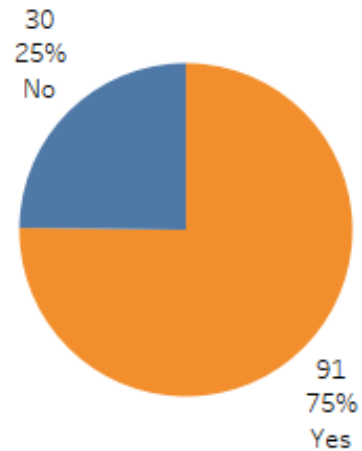
Survey Shows Users Who Completed Training More Satisfied with AggieBuy Experience

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

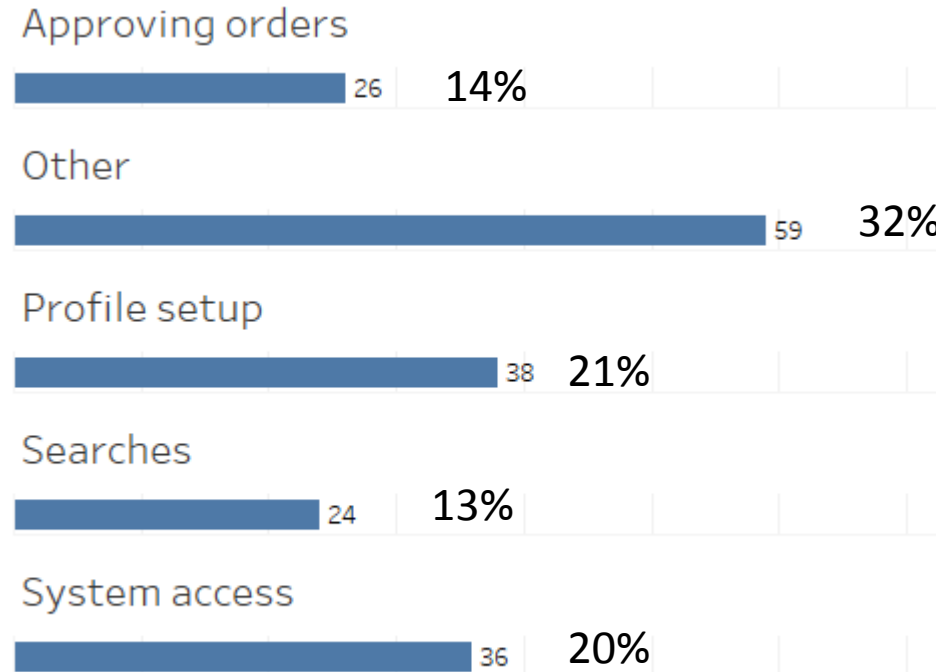
- We'll be creating mini-recorded sessions (2 to 3 mins) on various AggieBuy functions
- **POLL:** Any specific topics we should include?



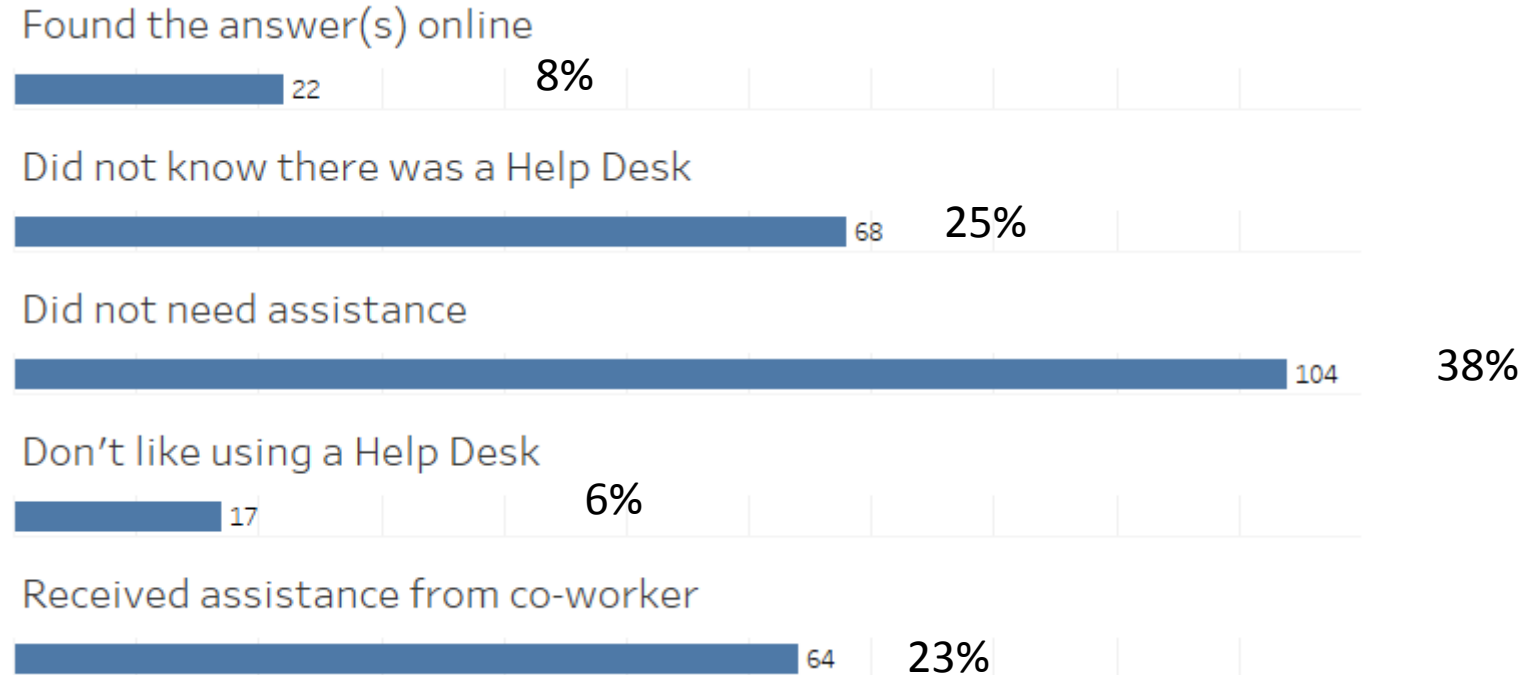
Debunking Myths!

- There isn't a Help Desk for AggieBuy. **FALSE!**
 - Help Desk email ab-help@ucdavis.edu
 - Help Desk phone (530) 754-1351
 - We'll continue to find additional ways to communicate this info

Top Help Desk Call Topics

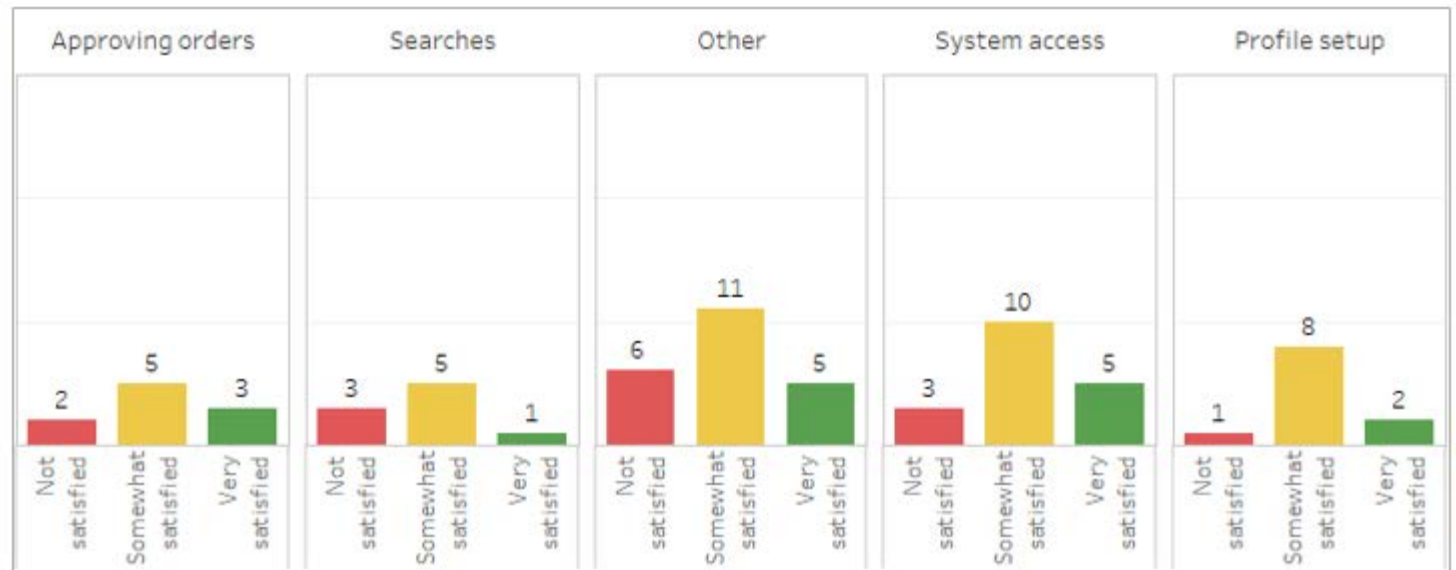


Reasons for Not Contacting Help Desk



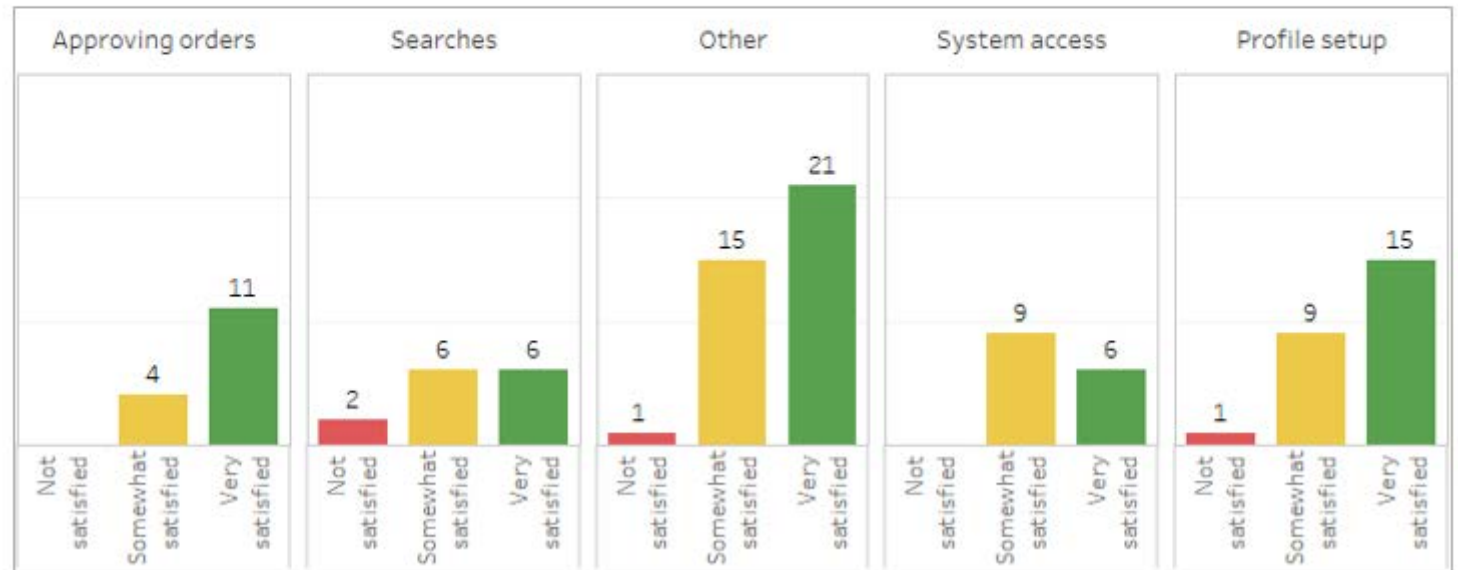
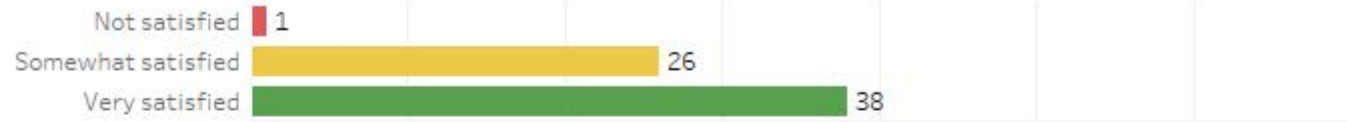
Survey Results with AggieBuy Help Desk Experience (no training completed)

If you contacted the Help Desk, please rate your experience:



Survey Shows Users Who Completed Training More Satisfied with AggieBuy Help Desk Experience

If you contacted the Help Desk, please rate your 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 ? X

Select from your code favorites

Chart-Account	Chart-Account-SubAccount	Project Code	% of Price	
3-7220352 Select from all values...	<input type="text"/> Select from all values...	<input type="text"/> Select from all values...	20	remove
3-6620110 Select from all values...	<input type="text"/> Select from all values...	<input type="text"/> Select from all values...	60	remove
3-AGGEBUY Select from all values...	<input type="text"/> Select from all values...	<input type="text"/> Select from all values...	20	remove

Split Total 100% [add split](#)

[recalculate / validate values](#) [show monetary calculations](#)

[Save](#) [Cancel](#)



Debunking Myths!

- You can't purchase capital assets in AggieBuy. **FALSE!**
 - Purchases of Capital Assets (items at or above \$5K) are ALLOWED
- Some users think there is a dollar limit for purchases in AggieBuy. **FALSE!**
 - Keep in mind that your fiscal officer/departments may have their own restrictions

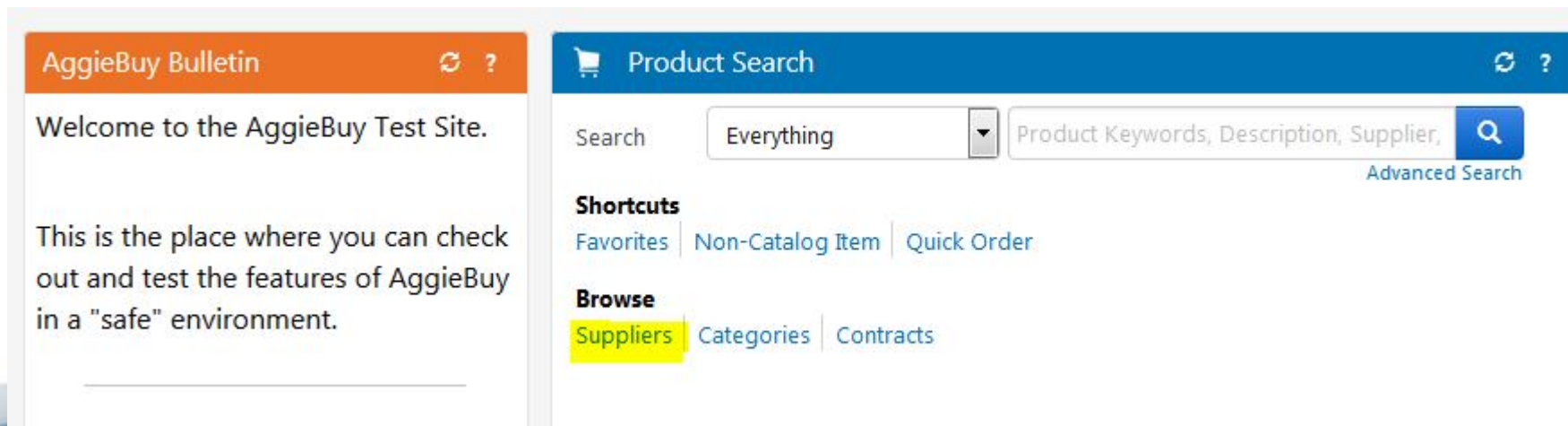
Tips and Tricks: Capital Asset Purchases

- **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

Results Per Page: 100

Sort by: Best Match

Page 1 of 1

legend ?

Supplier Name	Type	Preference	Supplier Name	Type	Preference
Agilent Technologies			Main Street Tech (HP)		
Apple Computer			Medline		
Bio-Rad Laboratories			National Gift Card Corp		
CDWG			New England Biolabs, Inc.		
Cell Signaling Technology			Office Max		
Dell			PerkinElmer Inc.		
Dharmacon, Inc.			QIAGEN, Inc.		
Eppendorf North America, Inc.			SHI International Corp.		
Fastenal Company			Sigma-Aldrich		
Fisher Scientific Company LLC			Spectrum Chemicals & Laboratory Products		
Genesee Scientific			United Corporate Furnishings (Steelcase Dealer)		
Grainger			Vet Med Central Services		
HD Supply Facilities Maintenance			VWR International		
Integrated DNA Technologies Inc.			Waxie Sanitary Supply		
Life Technologies					



Feedback on Most Requested New Suppliers

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

- 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:

Results for: Everything : pencil

Showing 1 - 20 of 1188 Results Compare Selected: 0

Results Per Page: 20 Sort by: Best Match Page 1 of 60

Add Keywords ?

Go

Filter Results ?

By Custom Attribute

Easy Buy (40)

By Product Flag

Green (133)

Recycled (32)

By Supplier

Fisher Scientific Company LLC (310)

Grainger (332)

HD Supply Facilities Maintenance (13)

Medline (27)

Office Max (324) [more...](#)

BIC Mechanical Pencils for Mitch from Office Max **2.73 USD**
Free Shipping
DZ
Part Number: N4MP11
Manufacturer Info: MP11EA - (BIC)
larger image
1 **Add to Cart** [add favorite](#) | [compare](#)

Pencil that Dr Smith really likes from Grainger **496.92 USD**
Free Shipping
EA
Part Number: 20UC99
Manufacturer Info: 52850 - (DYNABRADE)
larger image
3 **Add to Cart** [add favorite](#) | [compare](#)

Prang® 12-Color Pencil Set - DIX22120 from VWR International **2.41 USD**
12Item, KT
Part Number: 500035-674 (KT)
Manufacturer Info: DIX22120 - (Janitorial Supplies)
no image available
1 **Add to Cart** [add favorite](#) | [compare](#)



Prismacolor® Premier® Colored Pencil - SAN3597T from VWR International **26.55 USD**
24Item, KT
no image available

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:

Showing 1 - 8 of 8 Results Compare Selected: 0

Results Per Page: 20 Sort by: Price: Low to High Page 1 of 1 ?

 <p>larger image</p>	<p>ERASER CAP RED 12PK from Office Max</p> <p>Part Number: N4OD996772</p> <p>Manufacturer Info: OD996772 - (ATIVA)</p>	<p>0.64 USD</p> <p>Free Shipping EA</p> <p>1 Add to Cart ▼</p> <p>add favorite compare</p>
 <p>larger image</p>	<p>Prismacolor - Col-Erase Erasable Color Pencils - Red, 12/Pack from Office Max</p> <p>Part Number: N520045</p> <p>Manufacturer Info: 20045 - (SANFORD)</p>	<p>5.12 USD</p> <p>Free Shipping DZ</p> <p>1 Add to Cart ▼</p> <p>add favorite compare</p>

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...

no image available

Avery® Antimicrobial View Binder with One-Touch™ EZD™ Rings - AVE17144 from VWR International

Part Number 500038-220 (EA)

Manufacturer Info AVE17144 - (Janitorial Supplies)




13.42 USD

1Item, EA

1 [Add to Cart](#)

[add favorite](#) | [compare](#)

...and more of this...




larger image

Binder Antimicrobial 1-1/2 In Dark Blue

from Grainger

Part Number 35X741

Manufacturer Info SAM14352 - (SAMSILL)



9.23 USD

Free Shipping

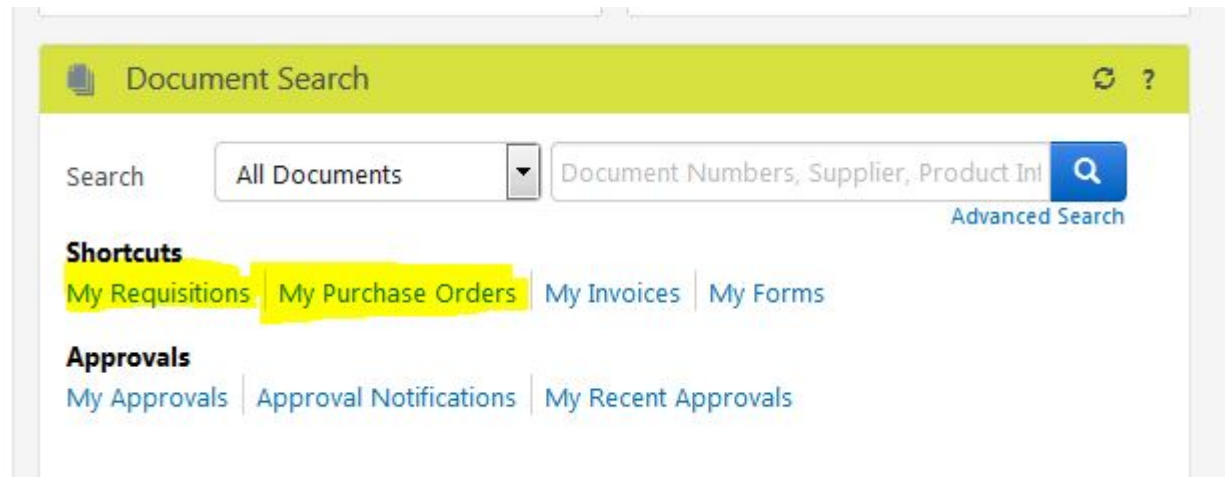
EA

1 [Add to Cart](#)

[add favorite](#) | [compare](#)

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:

The screenshot displays the AGGIEPRO requisition interface. On the left, a sidebar shows the requisition details: **Requisition: 97197056**, dated 2017-12-18, with status **Completed** and a total of **48.82 USD**. A 'Document Actions' dropdown menu is open, showing options: **Copy to New Cart** (highlighted in yellow), **Add Comment**, and **Add Notes to History**. The main content area includes a **Summary** section, a **Shipping** section with a dropdown arrow, and a **Ship To** section. Other visible elements include 'History', a printer icon, and a help icon.

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

The screenshot shows a web-based 'Add Favorite' dialog box. It has a title bar with a close button (X). The dialog is divided into two main sections: 'Step 1: Edit Item Details' and 'Step 2: Select Destination Folder'. In Step 1, there is a light blue header bar containing the text 'Office Max, Catalog No. N51620BRD'. Below this, there are three input fields: 'Item Nickname' with a star icon and a yellow highlight around the text 'Dr Smith's Art 102 Pencil'; 'Quantity' with a star icon and the value '1'; and 'Description' with a large text area and a '500 characters remaining' indicator. Step 2 is titled 'Step 2: Select Destination Folder' and includes a blue 'Add New' link with a dropdown arrow. Underneath, there is a section for 'Personal' with a yellow highlight around the text 'Sustainable Office Products'.

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!

Home > Microplates > Cell Culture Plates > Corning® BioCoat™ Microplates, Corning®

Corning® BioCoat™ Microplates, Corning®
Supplier: CORNING DISCOVERY LABWARE PHASE II

BioCoat™ Microplates are offered in a variety of surface coatings to enhance cell attachment and growth of more complex cell models.

NEED HELP?
Click to Chat with a Representative.

CORNING

ORDER

[Expand All](#) / [Collapse All](#) [Add to Basket](#)

B This item is currently unavailable on the UC Punchout. Please reach out to your VWR Representative for more information or request that it be added.

Color	Plate Format	Surface Treatment	Supplier No.	VWR Catalog Number	Unit	Availability	Your Price	Quantity
Black with Clear Bottom	384-Well, SV	PDL	356396	10119-342	Case of 50	Direct from Supplier	\$1,366.45	B
Black with Clear Bottom	384-Well	Collagen	354397	10119-296	Case of 5	Direct from Supplier	\$164.31	B
Black with Clear Bottom	1536-Well	PDL	356022	10119-340	Case of 50	Direct from Supplier	\$3,183.91	B
Black with Clear Bottom	384-Well, SV	PDL	354396	10119-294	Case of 5	Direct from Supplier	\$173.89	B
Black with Clear Bottom	384-Well	Collagen	356397	10119-344	Case of 50	Direct from Supplier	\$1,392.96	B

B This item is currently unavailable on the UC Punchout. Please reach out to your VWR Representative for more information or request that it be added.

[Add to Basket](#)

Tips and Tricks: Item Blocked By Your Organization

- Perform a search on the Main Dashboard Product Search...

Advanced Search
Everything
simple search

Find Results That Have:

All of These Words
356396

Supplier

Part Number (SKU)

Manufacturer Name

Other Options

Exact Phrase

Exclude Words

Any of These Words

Custom Attributes

Easy Buy


Search
Hide Advanced Search on search results

Go to: simple search | favorites | quick order
Browse: suppliers | categories | contracts

Results for: Everything : 356396

Showing 1 - 3 of 3 Results
Compare Selected: 0

Results Per Page: 20
Sort by: Best Match
Page 1 of 1


larger image

Microplate; Corning; BioCoat; Poly-D-Lysine; Flat bottom; TC-treated; Nonsterile; w/Lid; 384-well; 50/case; Black/clear bottom; 50/CS 356396 from **Fisher Scientific Company LLC**

Part Number: 0877531
Manufacturer Info: 356396 - (Discovery Labware)

1,337.75 USD
Free Shipping
CS

1
Add to Cart

add favorite | compare

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)

Requisition: 94930522
Dr Smith Lab Purchase

Status: **Draft**
Document Total: **19,994.07 USD**
[What's next for my order?](#)

Requisition ▾

Shipping ✓

Payment: Chart of Accounts ✓

General ✓

Capital Asset(s) ✓

Internal Notes and Attachm... ✓

Supplier Information ✓

Taxes, Shipping & Handling

Final Review ✓

General

Cart Name
Prepared for
Prepared by
Department
Buyer
Note to all Suppliers

RUA/LUA/MUA No.
Research Equipment?

Dr Smith Lab Purchase
JAMES HEWLETT
JAMES HEWLETT
ACCOUNTING & FINANCIAL SERVICE (062005)
no value

no note
⚠ Notes for the following suppliers are unsupported and will not be sent: Office Max, Grainger, Dell

no value
✖

Shopping on Behalf Of:
STUDENT HLTH & COUNSELING SVCS (068070)
STUDENT HLTH & COUNSELING SVCS (068070)

Department Approver
no value

Document Actions ▾ | History | | ?

edit

edit

Tips and Tricks: Approver Options

- Approvers must first assign Requisition to themselves...

The screenshot displays the AGGIEPRO interface for a requisition. On the left, a sidebar shows the requisition details: **Requisition: 1683880**, dated 2016-10-11, with a status of **Pending** and a document total of **105.76 USD**. The main content area shows a **Summary** section with a **Shipping** tab selected. The **Ship To** address is: Attn: Window Shopper UC Davis, Room/Ste/Floor Room 150, Dept. ACCOUNTING & FINANCIAL SERVICE, 260 COUSTEAU PL, DAVIS, CA 95618. A **Document Actions** dropdown menu is open, showing options: **Assign to myself** (highlighted), **Approve/complete step & show next**, **Approve/complete step**, **Copy to New Cart**, **Add Comment**, and **Add Notes to History**. The top of the interface shows navigation links like **Back to Approvals** and **1 of 5 Results**.

Tips and Tricks: Approver Options

- ...Then they can edit, return, reject, or approve Requisition

Requisition: 1683880
2016-10-11 davisshopper 01

Status: Pending
Document Total: 105.76 USD

Requisition ▾

Summary

Shipping

Payment: Chart of Accounts

General

Capital Asset(s)

Summary

Document Actions ▾ History ?

Approve/Complete & Show Next

Approve/Complete Step

Return to Shared Folder

Return to Requisitioner

Copy to New Cart

Add Comment

Add Notes to History

Reject Requisition

▼ **Shipping**

Ship To

Attn: Window Shopper UC Davis
Room/Ste/Floor Room 150
Dept. ACCOUNTING & FINANCIAL SERVICE
260 COUSTEAU PL
DAVIS, CA 95618
United States

Tips and Tricks: Receipt/Packing Slip Upload

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

Purchase Order:
UCDAB001504T Revision
0
2095583

Supplier: PerkinElmer Life I...
Status: Completed
Document Total: **13.94 USD**
[View Related Documents](#)

Status

Purchase Order
PO Documents


Document Actions

- Add Comment
- Add Notes to History
- Cancel PO
- Finalize Revision
- Create Receipt**
- Create Credit Memo
- Create Invoice
- Print Fax Version
- Send Test PO

Status

> **General Information**

< **Document Status**

Supplier Name PerkinElmer Life Inc.  [more info...](#)
Phone +1 617-350-9261
Supplier Sent To Supplier
Distribution Date/Time 12/13/2017 1:45 PM
Distribution The system distributed the purchase order using the method(s) indicated below the last time it was distributed:
cXML (Electronic Integration)

Help and resources

- Website:
 - <http://procurement.ucdavis.edu> (Procurement and Contracting Services)
- Help Desk:
 - ab-help@ucdavis.edu (AggieBuy)



Q&A



Thanks for coming today!

