WELCOME TO AGGIEBUY!

THE “NEXT GENERATION” OF E-PROCUREMENT AT UC DAVIS

JULY 2016

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ANALYST
PROCUREMENT & CONTRACTING SERVICES
Today’s Agenda

• What is AggieBuy?

• Project Timelines

• Who will use AggieBuy?

• What will happen to UCD Buy?

• Training and Help Resources

• Demo! Profile Settings, Home Page, Searching Catalogs, Placing an Order, Routing and Approvals

• Q&A
What is AggieBuy?

- AggieBuy will be the all-new e-procurement system for UC Davis!

- AggieBuy uses the **SciQuest** platform, which is used by most other UC campuses, including UC San Diego

  - UCSD has been using SciQuest for “Marketplace,” their e-procurement solution, since 2008!

  - Our AggieBuy implementation team has been working closely with UCSD to ensure a smooth and successful transition here at UCD
What is AggieBuy?

- AggieBuy will give you things that you’ve been asking for in UCD Buy for a long time!
  - Cleaner, easier to use system interface
  - Capital Assets (inventorial items above $5K) can be purchased in the system
  - You can now split fund orders, or even individual line items on an order
  - You can add attachments to your orders!
What is AggieBuy?

• Additional Benefits of AggieBuy Versus UCD Buy:

  • An approver can return a Requisition to the initiator for correction *without canceling it*

  • An approver can edit *any* fields on a Requisition, and ALL changes are *automatically* tracked for audit purposes in the *History* section

  • Departments have the option of setting up an approval that’s in addition to the Fiscal Officer/Account Delegate approval

  • Emails and System Notifications can be turned on/off based on your personal preference
What is AggieBuy?

- AggieBuy features the same suppliers that you have used in UCD Buy, but **new** suppliers will be available as well.

<table>
<thead>
<tr>
<th>OfficeMax</th>
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<th>Sigma-Aldrich, Inc</th>
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<tr>
<td>Life Technologies</td>
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<td>Bio Rad Laboratories</td>
<td>HD Supply</td>
<td>SHI (Software House International)</td>
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<td>PerkinElmer Health Sciences</td>
<td>Cell Signaling Technology</td>
<td>Main Street Technology</td>
</tr>
<tr>
<td>Spectrum Laboratory Products</td>
<td></td>
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</tr>
</tbody>
</table>
What is AggieBuy?

- AggieBuy will make the University’s process of adding **new** suppliers to e-procurement much easier, allowing departments to take advantage of even **more University agreements**, receiving **lowest overall costs** from suppliers and **free shipping** on many products.

- Suppliers who are used most frequently will offer better prices/incentives for continued use.
What is AggieBuy?

- Save Time and Money! Purchase and payment happen in ONE transaction in AggieBuy. Utilizing University agreements will be easier in AggieBuy than it has been in KFS.

- In KFS you have to process AT LEAST TWO transactions (Requisition and Payment Request) for each procurement transaction

- AggieBuy is in alignment with the University’s Financial Sustainability Action Plan (FSAP); FSAP goals include finding ways to process work more efficiently
Project Timelines: Two Phases

- Phase 1 started a year ago: Phase 1 will replace UCD Buy and will go-live later this calendar year (2016)

- Phase 2 is in Early Development: Phase 2 will replace more of the Purchasing functions in the Kuali Financial System (KFS) and is tentatively scheduled for go-live next calendar year (2017)
Project Timelines: Phase 1

- **July 2015**: Advisory Group Formed (Composed of campus departments and central office users, including SSC, Procurement & Contracting Svcs, Accounting & Financial Svcs)

- **Oct 2015**: Advisory Group discusses Workflow Options for AggieBuy


- **Mar-Jun 2016**: User Acceptance Testing by Advisory Group and Extended Advisory Group members
Project Timelines: Phase 1

- **July-Aug 2016**: Testing Hiatus for Fiscal Close

- **Sept-Oct 2016**: Pilot Group Testing with LIVE Orders!
  
  - There will be four “waves” of Pilot Group testers composed of a variety of department “types,” including administrative, academic, School of Medicine, and cluster units.

  - We’ll also be Piloting the Training (Classroom and Online) for these groups.

  - Pilot will be very helpful in ensuring that things are working as they should be, and in identifying any necessary adjustments to the system or training
Project Timelines: Phase 1

- **Sept-Oct 2016**: Meetings with Department Administrators to ensure that Requesters and Ad Hoc Approvers are set up for their department

- **Nov 2016**: Go-Live for **Everyone** and AggieBuy LIVE Supplier Showcase Event!

*Everyone* is described on the next slide!
Who will use AggieBuy?

- UC Davis Campus, School of Medicine, and ANR employees will use AggieBuy
- UCDMC employees citing Chart H (Hospital) accounts will NOT use AggieBuy
- UCDMC will be transitioning to a new Procurement/e-procurement system of their own in calendar year 2017. Until then, they’ll continue to use UCD Buy for their OfficeMax purchases
Who will use AggieBuy?

Most AggieBuy shoppers will be assigned to one of the following roles:

1. **Window Shopper: Default** access for all active UCD employees and affiliates; provides the ability to locate items and create a cart, but NOT submit it into routing

2. **Requester**: Users who can create a cart and submit it into routing; they can also submit carts assigned to them by a Window Shopper

A Roles Application in AggieBuy will allow a Department Administrator (generally Business Officer, MSO) to identify the Requesters in their departments
Who will use AggieBuy?

Most approvers will fall into one of the following roles:

- **Department Approver: Optional** user that can be set up as an ad hoc recipient for approval before the Fiscal Officer/Delegate approval occurs (set up by Department Administrator)

- **Fiscal Officers/Delegates:** The same Fiscal Officers/Delegates currently reviewing/approving your UCD Buy orders will be reviewing/approving your AggieBuy orders

- **Specialty Approvers:** Users in centralized offices, such as Environmental Health & Safety, Police Department, Tax Accounting, and Equipment Management will be reviewing/approving the same types of orders they currently do in the Kuali Financial System (based on commodity codes cited, if Research Equipment indicator is selected, etc.)
What will happen to UCD Buy after AggieBuy Goes Live?

- UCD Buy will continue to be available to UCDMC employees for placing orders until their new e-procurement system goes live in 2017.

- UCD Buy will continue to be available for other employees for reviewing/reconciling past orders, but it will not longer be available for placing new orders.

- UCD Buy will be officially decommissioned after the new UCDMC e-procurement system is live (later in 2017).

- NOTE: Historical information on UCD Buy orders will remain available in FIS Decision Support (DS) on various reports, including the Transaction Listing (2) and Feeder System Transaction Detail (212).
What About Training?

- Training will be available, both classroom and pre-recorded online options
- Training will NOT be required
- Enrollment for training will be in the UC Learning Center: http://lms.ucdavis.edu
What About Help?

- We have multiple **Help Guides** available on the AggieBuy information portal, accessible from the procurement.ucdavis.edu website:
  - Getting Started
  - Profile Set-Up
  - Shipping Addresses
  - Shopping
  - Approving Orders
- We have an ever-evolving **Frequently Asked Questions (FAQ)** section on our website as well!
Can’t Find the Help You Need?

• We’ll have an **AggieBuy Help Desk** that can help you find any of those “elusive” answers

• The email address will be **ab-help@ucdavis.edu**

• We’ll also have a phone number available

• Our goal is to ensure you have the resources and information you need to make your e-procurement as easy as possible!
Now it’s time for a Demo!

- Access the system at http://aggiebuy.ucdavis.edu
- Log in with your campus login ID and Kerberos passphrase
User Profile and Preferences

• Click on your username in the banner at the top of the page and choose “View My Profile.”

• Make sure your user information is correct and complete in AggieBuy…

• And, set up your “favorite” accounts and shipping addresses to save data-entry time!
User Profile and Preferences

- **Phone Number**, **E-mail Address**, and **Department** are read-only and are retrieved from the online campus directory listing.
- You should make any necessary changes *directly to your online directory listing* and the updated information will appear in AggieBuy the next business day.

<table>
<thead>
<tr>
<th>JAMES HEWLETT</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Name: <a href="mailto:Jimbob@ucdavis.edu">Jimbob@ucdavis.edu</a></td>
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</table>

<table>
<thead>
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<th>User's Name, Phone Number, Email, etc.</th>
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</thead>
<tbody>
<tr>
<td>First Name: JAMES</td>
</tr>
<tr>
<td>Last Name: HEWLETT</td>
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<tr>
<td>Phone Number: +1 (555) 123-4567</td>
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<td>Department: ACCOUNTING &amp; FINANCIAL SERVICE (062005)</td>
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<tr>
<td>Authentication Method: LoginXML</td>
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</tbody>
</table>
User Profile and Preferences

- The Language, Time Zone and Display Settings section is read-only

- Enable Accessibility Mode is designed to assist users with low vision; contact the AggieBuy Help Desk if you would like this feature enabled
Update Security Settings

- The **Change Email Approval Code** section allows approvers to set a code which will enable them to approve orders directly from an email notification without having to log in to AggieBuy.

- This can be helpful for users approving transactions from a smartphone or other mobile technology.

- This is an *optional* feature; *you always have the ability to approve orders directly in AggieBuy.*
Default User Settings

- The **Code Favorites** tab of the Custom Field and Accounting Code Defaults section allows you to indicate account(s) that you use on a regular basis, so that they’ll appear in a drop-down menu on new Requisitions.

- You can also choose one of your account favorites as a default so that it’ll pre-populate new Requisitions.

- This is OPTIONAL; you don’t have to enter a default account; you also have the ability to override the default account on each Requisition created in AggieBuy.
Default User Settings

- The **Default Addresses** section allows you to indicate **Ship To** address(es) that you use on a regular basis. You can choose one of these addresses as a default so that it’ll pre-populate new Requisitions.

- This is OPTIONAL; you also have the ability to override the default shipping address on each Requisition created in AggieBuy.

- **Bill To Address** section doesn’t need to be completed; payments will be **automatically** issued to suppliers.
Notification Preferences

- Most of the options in the Notification Preferences section are for administrator use, but the Shopping, Carts & Requisitions section is very helpful for setting the notifications (system and email) that can alert you to a variety of different “events” in AggieBuy

- Simply click on Edit Section to set the notifications that work best for you…and change them at any time!

<table>
<thead>
<tr>
<th>Notification Preferences: Shopping, Carts &amp; Requisitions</th>
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<tbody>
<tr>
<td>The in-application notifications are not yet available for all Email Notifications.</td>
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<table>
<thead>
<tr>
<th>Event</th>
<th>Options</th>
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</thead>
<tbody>
<tr>
<td>Prepared By - Cart Assigned Notice</td>
<td>None</td>
</tr>
<tr>
<td>Prepared By - PR line item(s) rejected</td>
<td>Email &amp; Notification</td>
</tr>
<tr>
<td>Prepared By - PR rejected/returned</td>
<td>Email &amp; Notification</td>
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<tr>
<td>Cart Assigned Notice</td>
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<tr>
<td>Receive PR and PO notifications for Carts</td>
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<td>Assigned Cart Processed Notification</td>
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</tr>
<tr>
<td>Assigned Cart Deleted Notification</td>
<td>None</td>
</tr>
<tr>
<td>Cart Shared Notice</td>
<td>None</td>
</tr>
<tr>
<td>PR submitted into Workflow</td>
<td>None</td>
</tr>
</tbody>
</table>
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!

AggieBuy Bulletins

Product Search
- Search: Everything
- Product Keywords, Description, Supplier
- Advanced Search
- Shortcuts: Favorites, Forms, Non-Catalog Item, Quick Order
- Browse: Suppliers, Categories, Contracts

Punch-out Suppliers
- Computing, Software, and Electronics
- CDW-G
- Dell
- Main Street Technologies (MST)
- SH International
- Furniture
- Steelcase
- Lab Essentials
- Fisher Scientific
- Sigma Aldrich
- VWR International
- Maintenance, Repair, and Operations
- Grainger
- Oligos and Sequencing
- Integrated DNA Technologies

Campus Services
- Aggie Surplus
- Central Storehouse
- Document Storage & Shred
- FedEx
- Gas Cylinder Returns
- Reprographics Document Services
- Software @ UC Davis

Document Search
- Search: Requisitions
- Advanced Search
- Shortcuts: My Requisitions, My Purchase Orders, My Invoices, My Forms
- Approvals: My Approvals, Approval Notifications, My Recent Approvals

Need Help?
- Frequently Asked Questions
- Have a question that is not addressed here?
- Contact us at ab-help@ucdavis.edu.

My Assigned Approvals
- Cart Assigned To Me

Orders
- My Returned Requisitions

Tools & Training
- A&PS Training
- Sourcing
- Contracts
- Other UCOP Training Materials
The **AggieBuy Bulletin** keeps users up-to-date on system maintenance, best practices, and other useful information. This information may also be emailed to you in the case of any critical updates.
AggieBuy Home Page: Product Search, Punch-Out Suppliers, Campus Services

- The **Product Search** allows you to search by product keyword, description, hosted OR punch-out supplier name, and manufacturer

- In the **Shortcuts** section, you can access or create “favorites” or place a “quick order” if you have the SKU (part number) of the item

- The **Browse** section allows you to search specific **hosted** suppliers or product categories
AggieBuy Home Page: Product Search, Punch-Out Suppliers, Campus Services

- The **Punch-out Suppliers** section allows you to visit the supplier’s dedicated “UC website” for searching and returning desired items to a local AggieBuy shopping cart.

- **Campus Services** includes links to services outside of AggieBuy that you might find helpful.
The Document Search section allows you to locate past and pending orders by a variety of criteria, including document number, product, supplier name, or document owner (Requester). Advanced Search enables searches on a wide variety of criteria.

The Shortcuts section is a “quick” way to see the documents you’ve created (or that have been created on your behalf).

The Approvals section is helpful for Fiscal Officers/Account Delegates/Other Approvers.
AggieBuy Home Page: Action Items

• The **Action Items** section provides a list of any items requiring your attention, including any Shopping Carts assigned to you by other users, Requisitions requiring your approval, and any Requisitions returned to you by an approver.

• Keep in mind that you can also set up email notifications for those items that appear in your **Action Items** list.
AggieBuy Home Page: Tools & Training, Additional Help

- Not sure where to begin? Have a question that needs an answer? The Tools & Training and Need Help? sections are there for you whenever you need them!
AggieBuy: Left Menu Options

**Home** icon will take you to the Home page

**Shopping Cart** icon will allow you to search for catalog items or view a list of your shopping carts

**Papers** icon allows you to search for previously-created documents

The last 3 icons are primarily for central office use and won’t generally be used by departmental users of AggieBuy
Let’s search for a beaker for our new Principal Investigator, Professor Becker, who is getting her lab set up...
• After locating the item you want, identify the **quantity** desired and click on **Add to Cart**. You can also click on “add favorite” if you’d like…

• When you’re done shopping, click on “view cart”
AggieBuy Cart Checkout

• Another option is to click on the cart icon at the top of the screen.

• You can then choose to view your cart, or check out your order.
Review each section in the left menu to ensure that the information on your request is correct

**Shipping** identifies the location where the item(s) should be shipped

**Payment: Chart of Accounts** identifies the account(s) to be used for payment

**Supplier Information** provides information on the supplier(s) cited on the order

**Taxes, Shipping & Handling** identifies any applicable taxes and shipping charges

The following slides provide more detail on the other menu options
AggieBuy Cart Checkout: General Section

- The **General** section includes your **Cart Name** which defaults to the date and your login ID; we recommend editing this to something that may be more useful to you and your approvers.

- Create a **Cart Name** that makes it easy to “identify” what it’s for.

- Examples of “helpful” cart names could be:
  - Professor Becker’s Beakers
  - Weekly Lab Supply 5-12-16
  - John’s New Lab Items
AggieBuy Cart Checkout: Capital Asset(s) Section

- The **Capital Asset(s)** section is **required** when your order includes any item(s) meeting the definition of a **Capital Asset**.

- This section should **not** be completed for tracking items in CAMS under the Capital Asset threshold.

  - Complete an **Asset Global (Add)** document in the **Kuali Financial System (KFS)** for tracking items under the threshold.
The **Internal Notes and Attachments** section is optional but can be helpful for attaching any supporting documentation, including any approvals secured outside of AggieBuy (as in pre-purchasing situations)

**Internal Notes and Attachments** can also be used by approvers
AggieBuy Cart Checkout: Final Review

- Any **defaults** set in your **user profile** will appear, but can be overridden by clicking the **edit** link; if no defaults are set up, the fields will be **blank**

- Review each section carefully, making sure that the desired information is entered; edit as needed

- **Assign Cart** button will appear for ALL users; **Place Order** will appear for users with **Requester** access
AggieBuy Requisition Submitted Screen

- After the **Place Order** button has been clicked, the following screen indicates that the Requisition has entered into routing.

- To see what approvals are required for the Requisition, click on the **View Approval Status** link.
AggieBuy PR Approvals Screen

- Click on **View Approvers** in any step to see a list of approvers who are authorized to complete that approval. Validations are automatically performed within the system.

- To see all the order activity up to the current time, click the **History** link.

- As noted on the PR Approvals screen, the PO is created and issued to the supplier(s) AFTER all approvals and validations have been completed.
Routing in AggieBuy

- **Fiscal Approval** routing uses the Fiscal Officer/Account Delegate information from the Kuali Financial System (KFS); a fiscal officer or delegate will be required to approve each transaction; **Separation of Duties** is automatically enforced.

- For certain commodities, the transaction will automatically route to additional approvers, including Environmental Health and Safety, Police, or Tax Accounting.
  - Routing to Capital Asset Accounting/Equipment Management will occur when the Capital Asset(s) section is completed.
AggieBuy Requisition Approval

- There are several ways for approvers to access Requisitions
  - By clicking on the Flag icon in the upper right corner; the # indicates the number of items for your attention/action
  - In the Action Items menu on the home page
  - In the Document Search menu on the home page, by clicking on My Approvals
**AggieBuy Action List**

- Click on the **Requisition Number** to access, review, and approve.

- If you want to work on the Requisition later, assign it to yourself.

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<tr>
<th>Requisition No.</th>
<th>Suppliers:</th>
<th>Assigned Approver</th>
<th>PR Date/Time</th>
<th>Requisitioner</th>
<th>Amount</th>
<th>Action</th>
</tr>
</thead>
</table>

**Requisition Name:** 2016-03-31 reindrop@ucdavis.edu 03

**No. of line items:** 1

**Folders:** 40 Days in folder [My PR Approvals]

[Chart/Account: 3-DOTJH48 (Partnered 40 Days in folder Pavement Research Center): (0.00 - 1,499.99 USD)]
AggieBuy Approving Requisition

- Click **Document Actions** and select the desired action
- You can also click on **edit** if you wish to make any changes (all changes are tracked документed in **History**)

![AggieBuy Approving Requisition](image)

- **Summary**
  - **Shipping**
    - **Ship To**
      - Address: TIFFANY HSEH
      - Room/Sci/Floor: 1200
      - Dept: SOCIOLOGY
      - ONE SHELD AV
      - SOCIAL SCIENCE & HUMANITIES BLDG
      - DAVIS, CA 95616-5270
      - United States
  - **Delivery Options**
    - Expedite
    - Ship Via
    - Requested Delivery Date

- **Document Actions**
  - 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
AggieBuy Return or Reject Requisition

- Requisition must be assigned to you before you can return or reject it
- **Return to Requisitioner** allows the **Requester** to make changes and re-submit
- **Reject Requisition** returns the Requisition to the **Requester** but does not allow them to make any changes to it (becomes a **read-only** document)
What Happens After All Approvals Have Been Completed?

- After the Requisition is fully approved in AggieBuy, the **Purchase Order (PO)** is created in AggieBuy and is exported to both KFS and the supplier. An **encumbrance** is created.

- In most cases, the campus ghost card is then charged by the supplier (with a few exceptions).

- The supplier then creates an invoice and submits it to AggieBuy; AggieBuy exports the invoice information to KFS.

- To record/process the payment, a **Payment Request (PREQ)** document is **automatically** created in KFS. The payment is made, and the encumbrance is removed.
What Happens After All Approvals Have Been Secured?

- Your items are shipped to the location you identified on your Requisition!
Identifying Items as “Received”

- The documentation of receipt of items is optional in AggieBuy.

- Receipt of Capital Assets purchased in AggieBuy must be documented in the Kuali Financial System (KFS) on the Line Item Receiving document.
Identifying Items as “Received”

- AggieBuy Purchase Orders include a Receipts section for entering the receipt of items purchased in AggieBuy.

- This process is optional.
Approved Transactions in FIS Decision Support (DS)

- The **Purchase Orders** and **Payment Requests** auto-created based on the AggieBuy Requisitions will post to the General Ledger and appear in FIS DS on various reports, including the **Transaction Listing (2)** and the **Feeder System Transaction Detail (212)**

- These transactions will also appear on the **Analytical Ledger Review (ALR)** and **Management Ledger Review (MLR)**
AggieBuy Best Practices

- Give your **Shopping Carts** names that make them easy to identify for approvers.

- Use the **Internal Notes and Attachments** section of your Shopping Cart to add back-up documentation or approvals that you secure outside of AggieBuy.

- If you currently use a “pre-purchasing system,” AggieBuy might mitigate the need for that system:
  - **Window Shopper** role is much like a “pre-purchaser.” The **Window Shopper** creates the cart and assigns it to a **Requester** who places the order on behalf of the **Window Shopper**.
  - **Department Approver** can be added to workflow.
Stay Informed!

- Visit the **AggieBuy** Informational Page accessible from the procurement.ucdavis.edu website

- Sign up for the **procure-info** user email list; link is available on the procurement.ucdavis.edu website as well
Q&A

- We welcome your questions!
Thank You for Your Time!