

P2P User Group: Focus Group #1

Finance

December 13, 2011



redefine THE POSSIBLE.





Using the P2P system, you can:

1. Shop for commonly-purchased goods from catalogs
2. Create PO's for custom orders (using an electronic requisition)
3. Process Cheque Requisitions
4. Order catered meals
5. Create and populate commonly-used forms

Procure-to-Pay (P2P)



The P2P system will be truly end-to-end:

Procure → Payment

- Shopping through a single online portal
- Creating a shopping cart
- Sending the cart for electronic approvals, including email notifications
- Automatically issuing PO's via CXML, email, or fax
- Streamlined fulfillment processes at vendor
- Many vendors will send electronic invoice data to P2P portal
- End users will typically not be involved in payment processes
- Software allows the invoice to be matched against the PO, with minimal interference from A/P
- Cheque Requisition will no longer be paper
- Software is integrated with PeopleSoft for electronic payment

Vendor Enablement



- York reviewed its vendor database to identify which vendors should be invited to participate in Phase 1
- Vendors were chosen based on the following factors
 - Annual spend
 - Number of transactions per annum
 - Value per transaction
 - Coverage of all major commodity types purchased at York
 - Consideration of pan-university vendor vs. department-specific
 - Previous onboarding experience with SciQuest
 - Expected ease of onboarding process for vendor

Supplier	Expected Type	User	Supplier	Expected Type	User
<u>IT</u>			<u>Lab Supplies</u>		
Apple Canada Inc.	Punch-out	Pan	Agilent Technologies Canada Inc.	Punch-out	Pan
Compugen	Hosted	Pan	Air Liquide	Punch-out	Pan
Data Integrity	Hosted	Pan	Applied Biosystems	Punch-out	Pan
Dell Canada Inc.	Punch-out	Pan	BIO-RAD Laboratories (Canada) Ltd.	Punch-out	Pan
Hewlett Packard Canada Ltd.	Hosted	Pan	Fisher Scientific	Punch-out	Pan
Nationwide Audio Visual	Hosted	Pan	GE Healthcare Bio-Sciences Inc.	Punch-out	Pan
			Invitrogen Canada Inc.	Punch-out	Pan
			Linde	Punch-out	Pan
			New England Biolabs Ltd.	Punch-out	Pan
			Qiagen Inc. (Canada)	Punch-out	Pan
			Sarstedt Canada Inc.	Punch-out	Pan
			Sigma Aldrich Canada	Punch-out	Pan
			VWR International	Punch-out	Pan
<u>Office Supplies</u>			<u>Furniture</u>		
Lyreco Canada	Hosted	Pan	Borgo Upholstery Ltd.	Hosted	CSBO
Ricoh	Hosted	Pan	Keilhauer	Hosted	CSBO
Staples	Punch-out	Pan	KI Canada	Hosted	CSBO
			Salix Systems Ltd.	Hosted	CSBO
<u>Beverages</u>					
Canadian Springs	Hosted	Pan			
Direct Coffee	Hosted	Pan			
Office Coffee Solutions Ltd.	Hosted	Pan			
Imperial Coffee Services Inc.	Hosted	Pan			
<u>Building Supplies/Custodial</u>					
Acklands - Grainger Inc.	Punch-out	CSBO			
Wood Wyant	Punch-out	CSBO			
			PAN = pan-University		

Project Timelines



Key project milestones are:

Oct 10	Development begins
Oct 10 - Dec 12	Configuration for Focus Group #1, including design of authentication standards, roles, workflows, forms, and integration with ERP
Dec 13	Focus Group #1
Dec 14 - Feb 27	Refine system functionality based on feedback from Focus Group #1
Feb 28	Focus Group #2
Mar 1 - Mar 31	Finalize design/functionality based on feedback from Focus Group #2
Apr 2 - Apr 15	Solution validation
Apr 16	Final testing starts and preparation of production site
Apr 30	User acceptance testing (UAT) begins
Jun 18	Live pilot begins
Aug 6 (tentative)	Roll-out to community

Roll-Out Plan



- Roll-out of production site will occur in staged fashion
- Pilot is anticipated to start June 18 with user group participants
- Roll-out to the full university community will depend on issues logged during pilot phase
- We anticipate a short pilot with tentative roll-out on August 6
- Training of the broader community would start in late June to prepare for roll-out date

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“York employees have better things to do than fill out paperwork. By embracing the new procurement tool, smart individuals not only save time; they save money. What’s more, they help reduce the University’s carbon footprint, which helps save the planet. How sm@rt is that?”

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We've got a look and image for Sm@rtBuy communications and the online portal:

A screenshot of the Sm@rtBuy online portal displayed in a Windows Internet Explorer browser. The browser's address bar shows the URL: https://userstest.sciquest.com/apps/Router/Home?tmstmp=1323731313062. The page header includes the York University logo, the Sm@rtBuy name, and a user profile for Cameron Rogers with a 'logout' link. A shopping cart icon in the top right corner shows '2011-11-17 rogersc 01 | 1 item(s), 1,935.00 USD'. Below the header is a navigation menu with links for 'home/shop', 'favorites', 'forms', 'carts', 'approvals', 'history', 'settlement', and 'more >>'. A search bar is located below the navigation menu, with a dropdown menu set to 'Shop' and a 'Go' button. The main content area is divided into three sections: 'Welcome to Sm@rtBuy' with a message about the new electronic procurement system; 'Hosted Catalog Suppliers' featuring logos for VWR International, BIO-RAD, GE Healthcare, Agilent Technologies, applied biosystems, and Fisher Scientific; and 'Showcased Services' with links for 'Non-Catalog Form', 'Catering Form', and 'New Vendor Request Form'. The browser's status bar at the bottom shows 'Internet' and '100%' zoom.

Sm@rtBuy



Here are some key questions we expect to be asked and the key messages we'd ask that you help us communicate to the community:

What is Sm@rtBuy?

- A PRASE initiative, Sm@rtBuy is York's new electronic procurement system, designed to improve our purchasing processes and procedures and reduce administrative costs
- An online "one-stop shop" that allows you to purchase and pay for anything your department needs, from office supplies to computers and scientific supplies

Sm@rtBuy



How will moving to Sm@rtBuy will help York?

- reduce the administrative burden, lower administrative costs and enhance service across the University
- improve our collective buying power and secure lower prices by maximizing relationships with preferred vendors
- reduce our carbon footprint

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How will Sm@rtBuy help me do my job?

- **A Real Timesaver:** Sm@rtBuy will cut the steps in processing from 20 to 7 and the total processing time spent purchasing items by approximately 2 hours per transaction. So instead of spending time filling out paperwork, you can focus your time on other value-add activities.
- **Ease of Use:** Sm@rtBuy is a smart system. It walks you through step by step. It's easy to use and similar to other websites where you buy things online like amazon.com and target.com.
- **Transparency:** Sm@rtBuy provides you with one single “shopping basket”. Now you can easily locate what you need to buy, at the best price from York's preferred vendors. You can compare products across suppliers without having to toggle between different websites.

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How will I get training?

- The training needed is minimal. All staff/faculty will be given training as well as on-going support to let you get the most out of the new on-line system.
- For most of you, hands-on training will be available in July 2012. For pilot departments, training will come earlier.

When is this going to happen?

- Sm@rtBuy will launch in a staggered rollout. For pilot departments, implementation will be in June 2012. University-wide implementation will be in August 2012.

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Responsibilities for Focus Group #1

- Honest, open feedback
- Respectful dialogue
- Willingness to reconsider existing processes

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Session	Date	Time
January Update	January 24, 2012	9:00am - 10:00am
Focus Group #2	February 27, 2012	8:30am - 4:30pm*

*exact timeslots and further details to be communicated

Sm@rtBuy



Contact Procurement Services at smartbuy@yorku.ca

