Sm@rtBuy User Group: Monthly Session

Finance Department
February 7, 2012

YORK U
redefine THE POSSIBLE.
UNIVERSITÉ UNIVERSITY

Agenda

- Refresher on Sm@rtBuy Streams

- Clarification of System Roles

- Review of Process from Start to Finish

- Key Decisions

- Supplier Enablement Update

- Open Forum

- Questions

Sm@rtBuy Streams

Catalog
(hosted/punch-out)

Non-Catalog
(aka Purchasing Requisition)

Form
(ex: catering, printing)

Purchase Order

Vendors

Non-PO Invoice
(aka Cheque Requisition)

Sm@rtBuy Roles

Shopper
•Find items and create shopping cart(s)
•Punch-out and hosted catalogs available
•Forms used to procure non-catalog and specialty items

Requestioner
•Can also shop in Sm@rtBuy and create shopping cart(s)
•Enters chartfields
•Submits shopping cart(s) as requisition for approval

Approver
•Reviews requisition details
•Cannot modify cart details
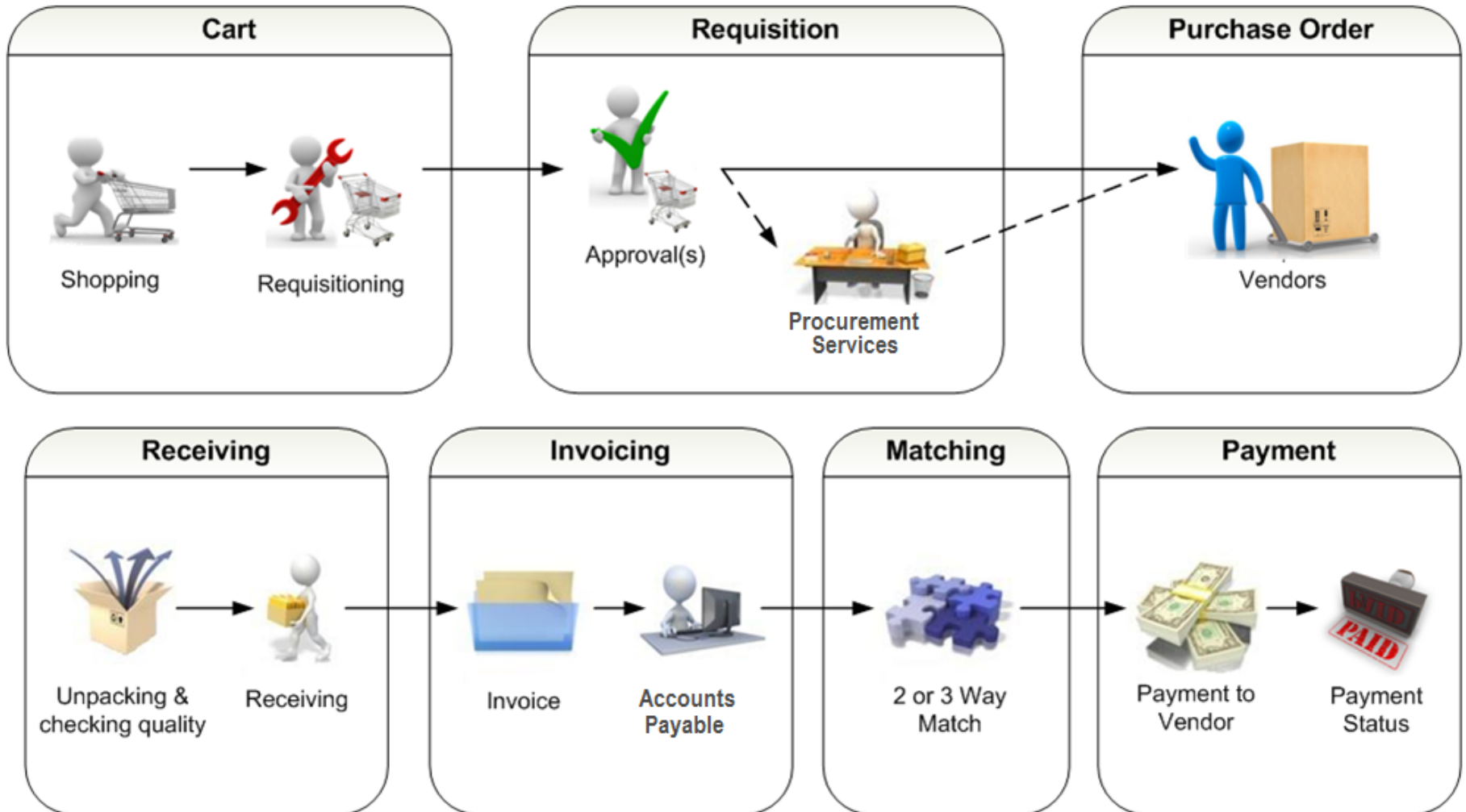•Can approve, reject, or return to requisitioner

Vendor
•Receives purchase order(s) through automated process (electronic, email, fax)
•Order confirmation capability with certain vendors

All users, regardless of role, will authenticate through Passport York

Shopping & Requisitioning

- All employees of York will be able to authenticate into Sm@rtBuy through Passport York

- All users will be given a base role of Shopper

- Procurement Services will manage which users are granted a Requisitioner role

    - Application process

    - Likely approval from Faculty EO or FO

Approvals

Automated workflow based on select criteria such as:

  –Dollar amount

  –Fund

  –Type of product purchased
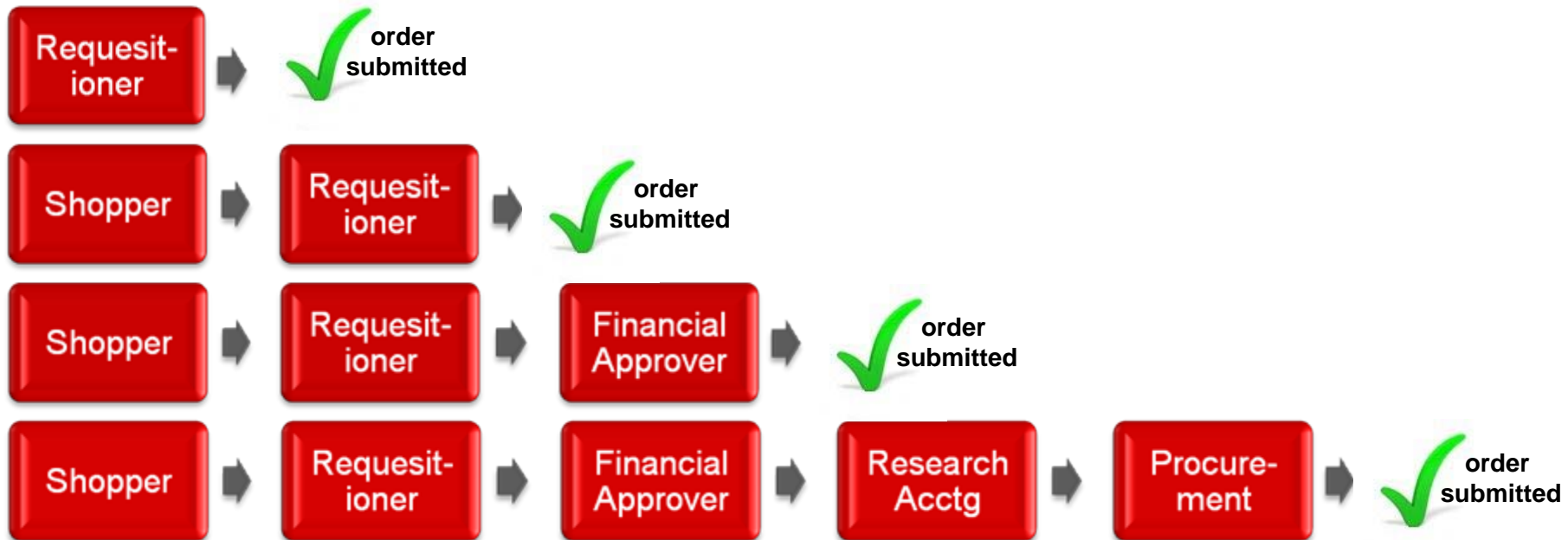
Approvals

- Approvals will be determined by the workflow model

- Approval roster will be managed and maintained in PeopleSoft and fed into Sm@rtBuy

- All users designated as a signing authority (for Sm@rtBuy) will automatically be granted an approval role

Approvals: What are their names?

- Current cost centre set-up looks like this:

Authorized Signee

SetID: YORK   **Cost Centre:** 100820   AK-MATH   **Status:** Inactive

Manager ID: 000871   Greene,Felim   Cost Centre   Personal Data

Scroll Area   Find | View All   First ◄ 1 of 1 ► Last

Effective Date: 02/01/2010 📅   **Comments:**

Customize | Find | View All | 🎛   First ◄ 1-6 of 6 ► Last

	*Signee Type	*Signing ID	Name		
1	DELEGATED ▼	000871	🔍 Greene,Felim	+	−
2	PRIMARY ▼	001312	🔍 Lenton,Rhonda	+	−
3	DELEGATED ▼	002111	🔍 Shewell,Hugh	+	−
4	DELEGATED ▼	002807	🔍 Thomson,Kelly	+	−
5	DELEGATED ▼	003544	🔍 Collins Currell,Judy	+	−
6	DELEGATED ▼	003735	🔍 Ramkhelawan,Elsie	+	−

💾 Save   🔍 Return to Search   ↑ Previous in List   ↓ Next in List   ✉ Notify   🔄 Refresh   Update/Display   Include History   Correct History

- Revised set-up would look like this:

Authorized Signee

SetID: YORK   **Cost Centre:** 100820   AK-MATH   **Status:** Inactive

Manager ID: 000871   Greene,Felim   Cost Centre   Personal Data

Scroll Area   Find | View All   First ◄ 1 of 1 ► Last

Effective Date: 02/01/2010 📅   **Comments:**

Customize | Find | View All   First ◄ 1-9 of 9 ► Last

	*Signee Type	*Signing ID	Name	SmartBuy		
1	DELEGATED ▼	000871	🔍 Greene,Felim	X	+	−
2	PRIMARY ▼	001312	🔍 Lenton,Rhonda		+	−
3	DELEGATED ▼	002111	🔍 Shewell,Hugh		+	−
4	DELEGATED ▼	002807	🔍 Thomson,Kelly		+	−
5	DELEGATED ▼	003544	🔍 Collins Currell,Judy	X	+	−
6	DELEGATED ▼	003735	🔍 Ramkhelawan,Elsie		+	−
7	AVP/DIR/EO ▼	000871	🔍 Greene,Felim	X	+	−
8	AVP/DIR/EO ▼	001312	🔍 Lenton,Rhonda	X	+	−
9	VP DESIGNATE▼	001732	🔍 Ooi,Richard	X	+	−

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Approvals: Making it easy!

- System will be configured to allow for PIN approvals

- Benefits

  - As simple as entering 4-digit PIN code

  - Can action requisition directly from email without entering the marketplace

  - Easy to use on remote devices

Approvals: Email notifications

- Every individual designated as a cost centre approver in Sm@rtBuy will have default email notifications turned on

- When a cart is charged to a particular cost centre, every designated approver on that cost centre receives an email

  - Units must be careful in choosing the # of approvers

  - Business rules must be put in place for approvers to know which carts to action

  - Sophisticated users can adjust their notification settings

Approvals: Delegation in times of absence

Approval(s)

- System allows approvers to delegate during times of absence

Approvals: Multiple roles

- Usually we do not expect approvers to have a need to buy

- If there are situations where an individual who is typically an approver needs to buy, then the following applies:

  - Carts of $5K against operating fund don't need approval

  - For carts above $5,000, an approver can <u>never</u> approve his/her own cart

  - Multiple approvers need to be set-up on cost centres

  - More senior individual should approve

Purchase Order

- Purchase order is issued in automated fashion to vendor

    - CXML

    - Email

    - Fax

- All PO's created in the Sm@rtBuy system will create a commitment in eReports

- Commitment in eReports will reduce as invoices are processed against the PO

Receiving

Unpacking & checking quality → Receiving
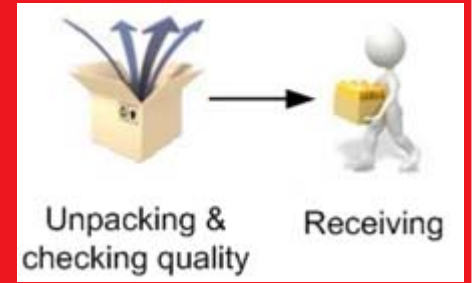
- Any PO of $5,000 or more (including shipping, handling, taxes) will require a system receipt
    - Applies to both catalog and non-catalog POs
    - Can be performed by either shopper, requisitioner, or approver
    - Implication: without receiving, invoice will not be paid
- For a PO of less than $5,000, where PO and invoice match, payment will occur

Payment

- Wherever possible, catalog vendors will be providing e-invoices

- Invoices for non-catalog POs will be in paper form

- All invoices for POs will be sent to Central Accounts Payable

- Preferred payment method will be central payment card (managed by Procurement Services)

- Most accounts will be available in Sm@rtBuy

  - Controlled or central accounts will not be

- All active cost centres will be available for use in Sm@rtBuy

  - There are no user limitations to which cost centre may be used

- Catalog items will be pre-populated with a G/L account number

Balance Checking / Funds Availability

- Before a requisition can turn into a PO, balance checking will take place for funds 400, 500, 600, and 700

- There is no balance checking on funds 100, 200, 300

Supplier	Expected Type	User	Supplier	Expected Type	User
IT			**Scientific Supplies**		
Data Integrity	Hosted	Pan	BIO-RAD Laboratories (Canada) Ltd.	Punch-out	Pan
Dell Canada Inc.	Punch-out	Pan	Fisher Scientific	Punch-out	Pan
Hewlett Packard Canada Ltd.	Hosted	Pan	Life Technologies; formerly	Punch-out	Pan
Nationwide Audio Visual	Hosted	Pan	Invitrogren Canada Inc.		
			Applied Biosystems		
Office Supplies			Linde	Hosted	Pan
Lyreco Canada	Hosted	Pan	New England Biolabs Ltd.	Punch-out	Pan
Staples	Punch-out	Pan	Qiagen Inc. (Canada)	Punch-out	Pan
			Sarstedt Canada Inc.	Punch-out	Pan
Catering			Sigma Aldrich Canada	Punch-out	Pan
Aramark Canada	Punch-out	Pan	VWR International	Punch-out	Pan

Beverages

Supplier	Expected Type	User
Direct Coffee	Hosted	Pan
Office Coffee Solutions Ltd.	Hosted	Pan
Imperial Coffee Services Inc.	Hosted	Pan

Building Supplies/Custodial

Supplier	Expected Type	User
Acklands - Grainger Inc.	Punch-out	CSBO

PAN = Vendor is used pan-University

Session	Date	Time
Focus Group #2	February 28, 2012	8:30am - 4:30pm
Focus Group #2 $\rightarrow$ hands-on session	February 29, 2012	9:00am - 12:00pm
March update	March 27, 2012	1:00pm - 3:00pm
April update	April 23, 2012	1:00pm - 3:00pm
May update	May 29, 2012	9:00am - 11:00am
June update	June 26, 2012	1:00pm - 3:00pm

Questions

Contact Procurement Services via e-mail – smartbuy@yorku.ca