

# Sm@rtBuy Advisory Board: Monthly Session



**Finance Department**

February 27, 2012

# 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)

**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

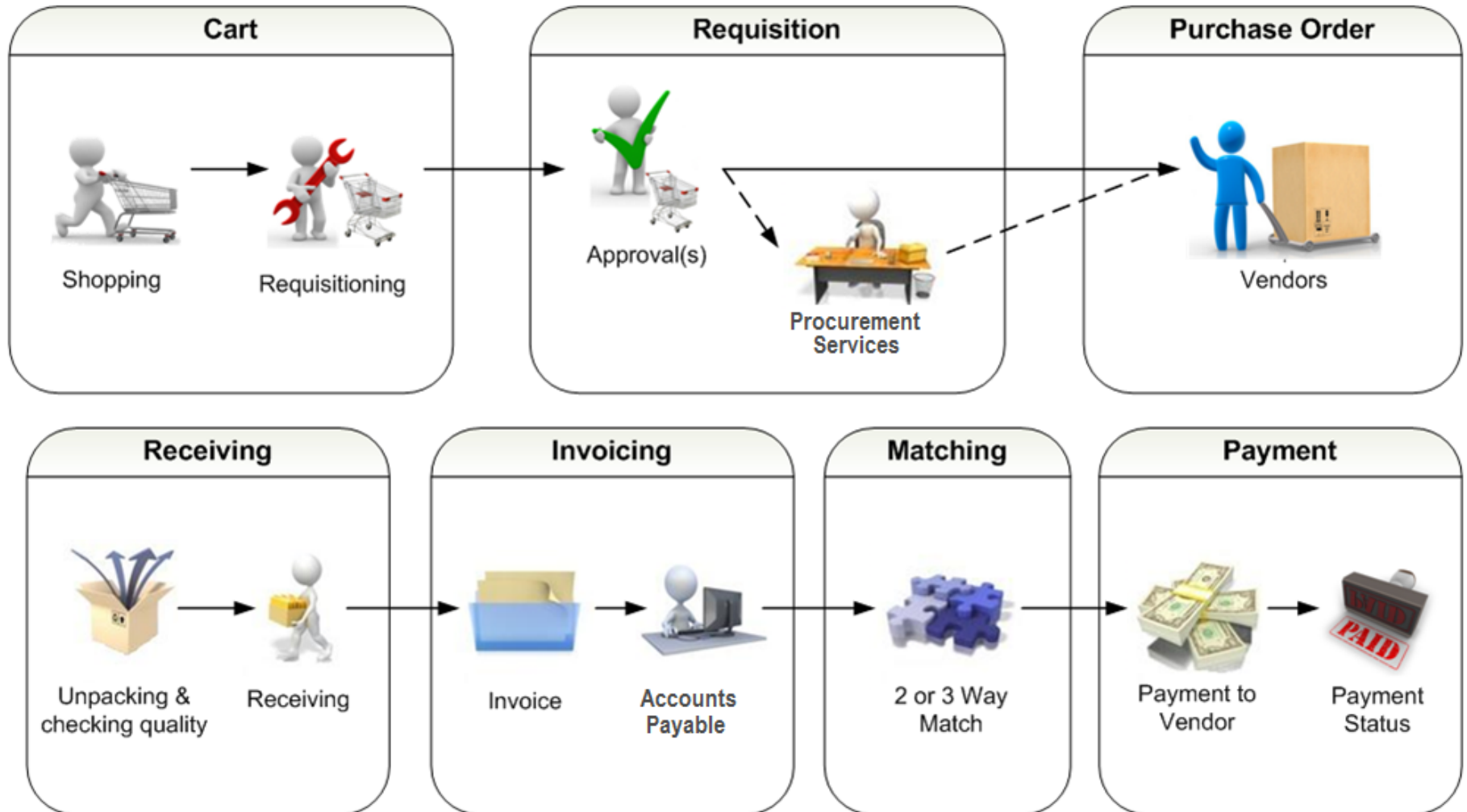


## Vendor

- 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

# Sm@rtBuy: Start to Finish



# Shopping & Requisitioning



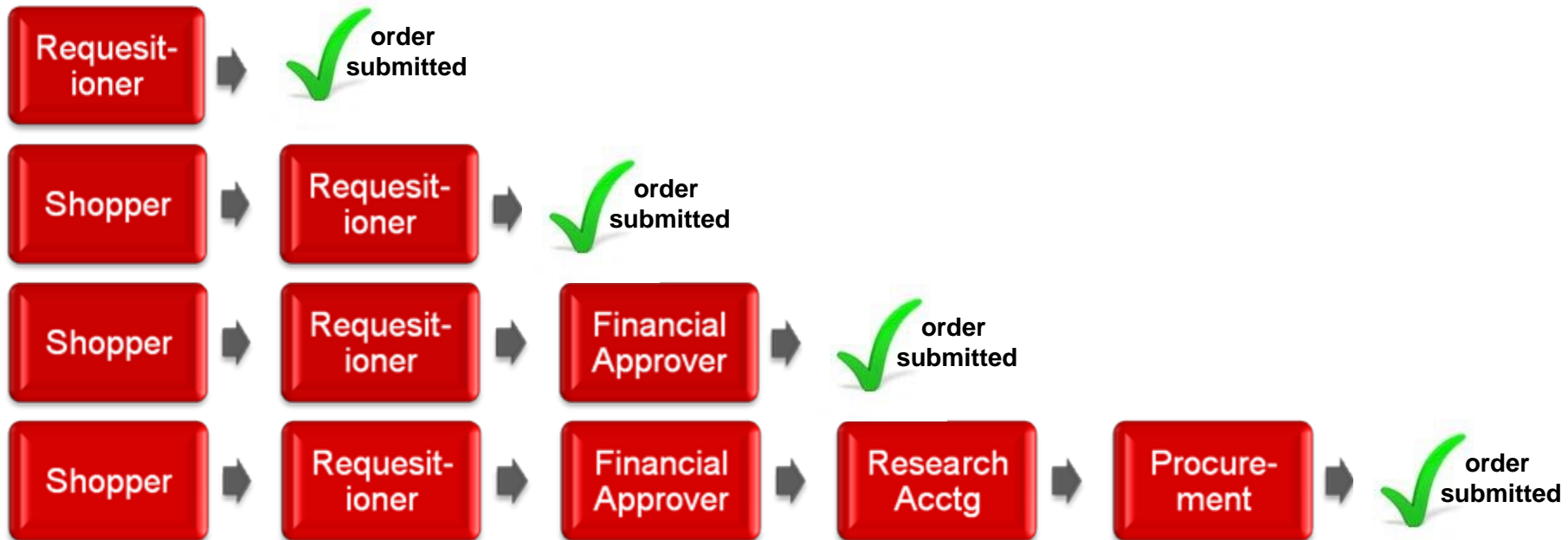
- All employees of York will be able to authenticate into Sm@rtBuy through Passport York
- All users will be given a base role of Shopper
- Procurement Services will manage which users are granted a Requisitioner role
  - Application process
  - Likely approval from Faculty EO or FO

# 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:

*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

# Approvals: What are their names?



- 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	+ -

# 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
- SO** • 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



- System allows approvers to delegate during times of absence

YORK Sm@rtBuy Approvals - Requisitions

Approver Approver 1 profile | logout

home/shop | favorites | forms | carts | **approvals** | history

requisition | invoice | requisition outbox | invoice outbox

Assign substitute to all folders... End substitution for all folders Substitute assigned to 20 folders ( 20 total folders )

+ Click to filter requisitions ?

Hide requisition details

Current Substitute: Melody King End substitution for this folder

## Approvals: Multiple roles



Requisitioning



Approval(s)

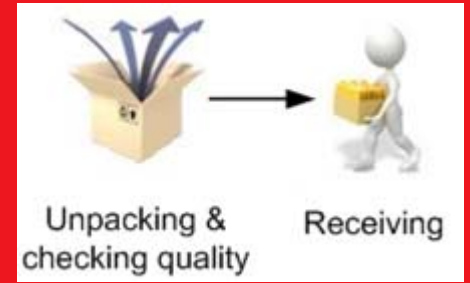
- Usually we do not expect approvers to have a need to buy
- If there are situations where an individual who is typically an approver needs to buy, then the following applies:
  - Carts of \$5K against operating fund don't need approval
  - For carts above \$5,000, an approver can never approve his/her 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



- 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)

# Chartfield Availability



- 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
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**IT**

Data Integrity	Hosted	Pan
Dell Canada Inc.	Punch-out	Pan
Hewlett Packard Canada Ltd.	Hosted	Pan
Nationwide Audio Visual	Hosted	Pan

**Office Supplies**

Lyreco Canada	Hosted	Pan
Staples	Punch-out	Pan

**Catering**

Aramark Canada	Punch-out	Pan
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**Beverages**

Direct Coffee	Hosted	Pan
Office Coffee Solutions Ltd.	Hosted	Pan
Imperial Coffee Services Inc.	Hosted	Pan

**Building Supplies/Custodial**

Acklands - Grainger Inc.	Punch-out	CSBO
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PAN = Vendor is used pan-University

**Scientific Supplies**

BIO-RAD Laboratories (Canada) Ltd.	Punch-out	Pan
Fisher Scientific	Punch-out	Pan
Life Technologies; formerly Invitrogen Canada Inc.	Punch-out	Pan
Applied Biosystems		
Linde	Hosted	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



# Reminder: Upcoming Dates for User Group



Session	Date	Time
Focus Group #2	February 28, 2012	8:30am - 4:30pm
Focus Group #2	February 29, 2012	9:00am - 12:00pm
→ hands-on session		
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 at [smartbuy@yorku.ca](mailto:smartbuy@yorku.ca)

