

User Group Kickoff Meeting



November 21, 2011





Agenda

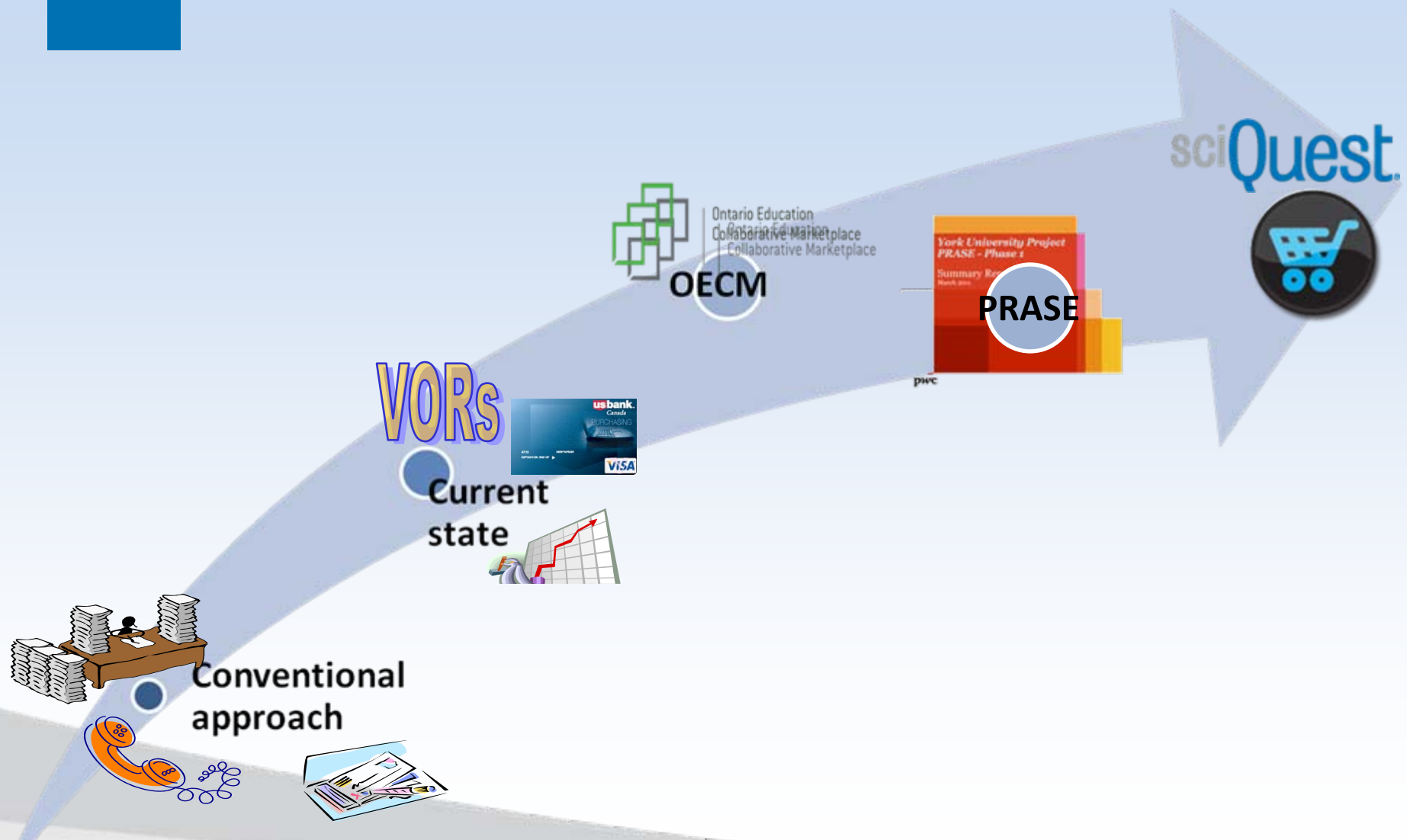
- Welcome and Introductions
- Evolution of P2P Project
- What is the P2P Project?
- What are York's Objectives for the P2P Project?
- Business Case
- Roles and Responsibilities
- Timelines
- Presentation from Steven Brian, Client Delivery Manager for SciQuest
- Product Demonstration

Welcome / Introductions

- Steering Committee Membership

- Trudy Pound-Curtis, AVP Finance and CFO Co-Chair
- Melody King, Director, Procurement Services Co-Chair
- Aldo DiMarcantonio, University Comptroller
- Renata Faverin, PRASE Program Director
- Luana Jursza, Director of Client Solutions and Services, UIT
- Richard Ooi, Senior Executive Officer, VP Academic & Provost
- Cameron Rogers, Assistant Comptroller
- Max Wordley, Senior Business Solutions Analyst, UIT
- Steven Brian, Client Delivery Manager, SciQuest

Evolution of York's P2P Project

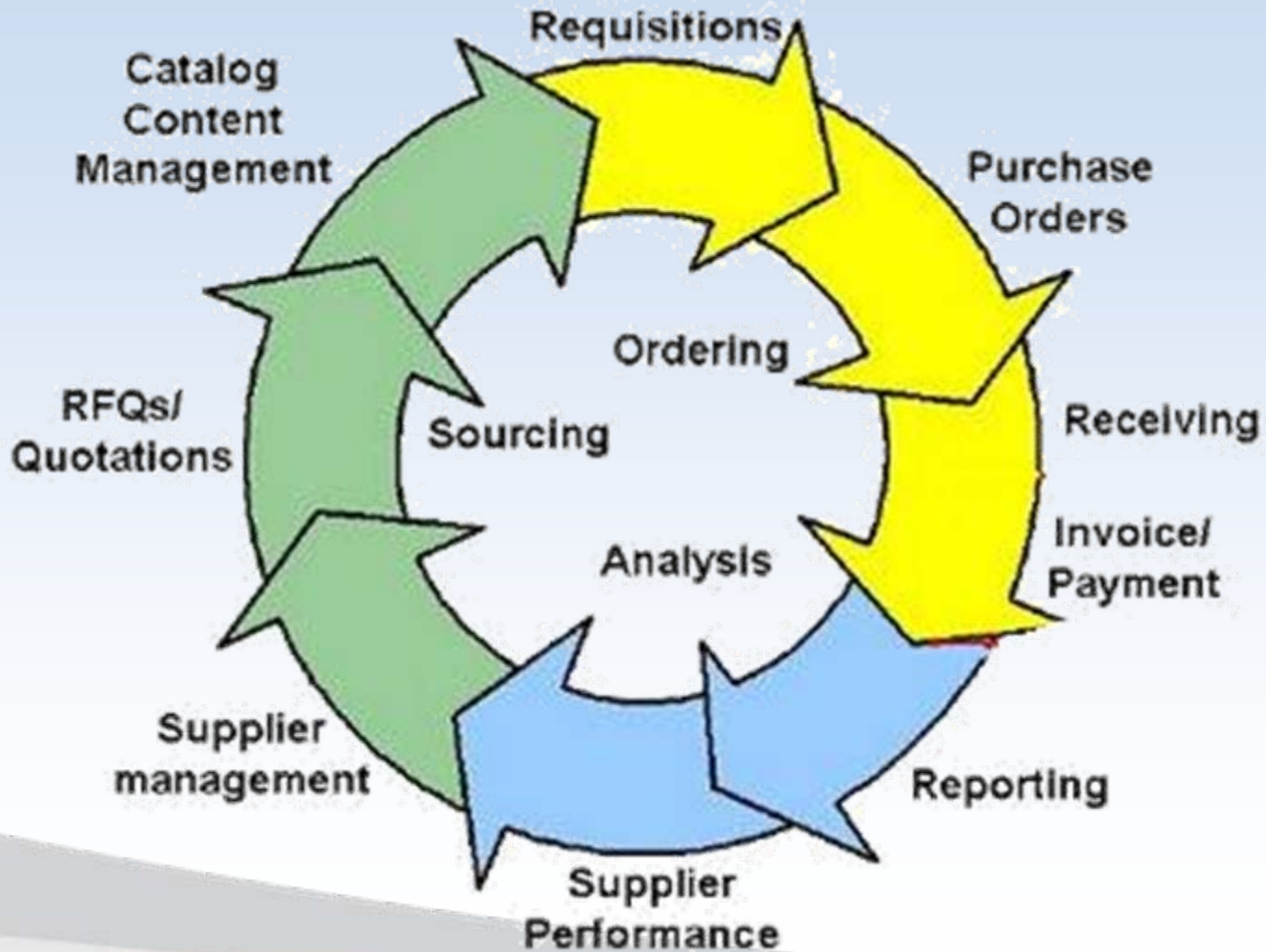


P2P Project Supported by PRASE

- PwC Phase 1 Report identified opportunities for reducing the effort and cost of key administrative process flows at York with a view to enhance service delivery
- Of the 29 Finance/Procurement opportunities identified, this project was viewed as one of the top priorities
- P2P Project includes eRequisitioning, another opportunity in PRASE report (i.e. reducing manual paper processes associated with Cheque Requisitions and Purchasing Requisitions)

What is P2P?

It's the Procure-to-Pay Lifecycle ("P2P")



What is the P2P Project?

- Development of York-branded portal for staff/faculty to purchase goods and services
- Initial scope is focused on low value goods that are purchased regularly by departments across the University
 - office supplies
 - scientific supplies
 - computers and accessories
- e-procurement tool is highly automated and straightforward to use. Product has been designed with user experience in mind. It also requires minimal intervention from Procurement or Accounts Payable staff.

What is the P2P Project?

- **Functionality allows:**

- designated user to log onto portal through Passport York
- shop for goods from hosted and punch-out catalogs, using York's vendors of record
- combine various types of goods from many supplies onto one order
- electronically complete a requisition, obtain approvals (if needed), and issue POs to suppliers
- goods are shipped to requestor, who then confirms receipt in portal
- invoicing and payment occur without any intervention from user/approver



What are York's Objectives for the P2P Project?

- Qualitative:
- A positive user experience that enables staff/faculty to easily shop and pay for frequently-used goods
 - Automation of existing paper-based process flows
 - Reduction in time spent purchasing low-value goods
 - Time savings are expected from sophistication/automation of tool
 - Centralized portal for all procure-to-pay needs
 - One site to purchase from many suppliers
 - Automated Cheque Requisition
 - Advanced forms that assist with ordering goods and services from internal suppliers (e.g. from ordering business cards to catering a lunch)

What are York's Objectives for the P2P Project?

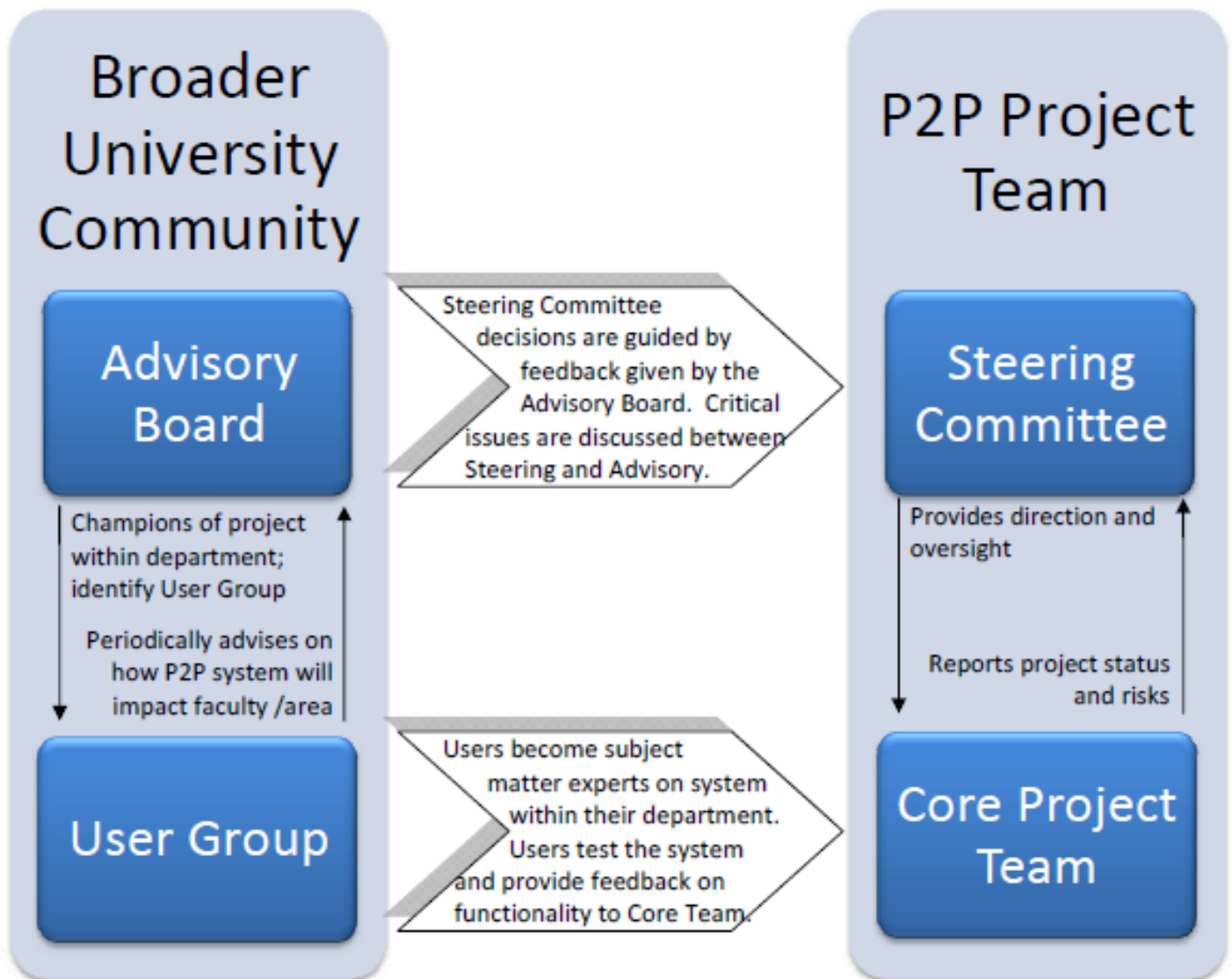
- Quantitative:
- Anticipated savings from sourcing goods:
 - Sheer ease of portal will result in consolidation of spend, thereby increasing the University's purchasing power
 - Suppliers will reap cost efficiencies from streamlined P2P processes, in turn passing back savings to York
 - Procurement will have detailed metrics to facilitate improved negotiation with vendors
 - Anticipated savings from process efficiencies:
 - Workload efficiencies will result from reduced number of steps in electronic P2P process, both at departmental level and central support functions
 - Reduction in paper, photocopying, and internal mail costs

All your P2P needs satisfied in one place!

Business Case

- York's expected return on investment is approximately **\$5M** over **5 years**, attributable to greater **strategic sourcing, contract compliance, and process efficiencies**
- Aberdeen Group research concluded typical post-implementation benefits of e-procurement include **5-10% reduction in indirect/non-production spend**
- Anderson Consulting estimated that the typical organization will **reduce its indirect spend by 7%** by using e-procurement.
- Gartner, Inc. estimates that small and mid-tier life science companies can achieve savings of **15-20% by using e-procurement** solutions **“that help researchers make smarter buying decisions”**.
- Forrester Research predicts e-procurement solutions will **deliver 5-15 % cost savings in the first year**.

Procure 2 Pay Project Governance Structure



Roles and Responsibilities

Role	Responsibilities	Time Commitment	Membership
Advisory Board	<ul style="list-style-type: none"> Act as project champions within faculties and/or departments so that interest and participation are high. By doing so, this will ensure there is successful adoption of the P2P marketplace once the system is live. Nominate suitable members for the User Group. Participate in two forums, which are platforms for the Advisory Board and User Group to view the P2P functionality (in detail) and see business scenarios route through the P2P marketplace (i.e. purchase of office supplies, beakers, etc.) 	<ul style="list-style-type: none"> Advisory Board welcome session (approx. 2 hours) Monthly meetings from October to around June (approx. 1-2 hours each) Two forums (approx. 3 hours each) 	<ul style="list-style-type: none"> Senior community members from across the University, including all faculties and divisions. Membership largely consists of Executive Officers from faculties and senior personnel from non-academic divisions.
User Group	<ul style="list-style-type: none"> Participate in two forums (see above). Assist with testing of the marketplace throughout the course of the project. Members of the user group will actually test the system with sample purchases that would be typical for their area. Members will be engaged in the project and provide feedback on how the functionality may or not may work for their area. The ultimate design of the system will be guided by the feedback received from the User Group. 	<ul style="list-style-type: none"> User Group welcome session (approx. 3-4 hours) Monthly meetings from October to around June (approx. 1-2 hours each) Two forums (approx. 3 hours each) Members will be asked for dedicated time for testing the system (estimated at approx. 16-32 hours) Exact time to be determined and communicated. 	<ul style="list-style-type: none"> Consists of University members who conduct purchasing within their departments. These individuals are the buyers at the University. Many of the members of the User Group will be existing PCard users. The Advisory Board will advise on the composition of the User Group. User Group will also have functional staff from Accounts Payable and Procurement who will manage the system once it is operational.

Advisory Board

- The Steering Committee will consult with the Advisory Board on the following subjects:
 - user group participants
 - system workflows
 - business rules
 - any redesigns of business process that come about from implementation
 - particularly the **Cheque Requisition process**
 - suppliers who are enabled on portal
 - communication to community
 - roll-out of portal to University community
 - related matters as they arise

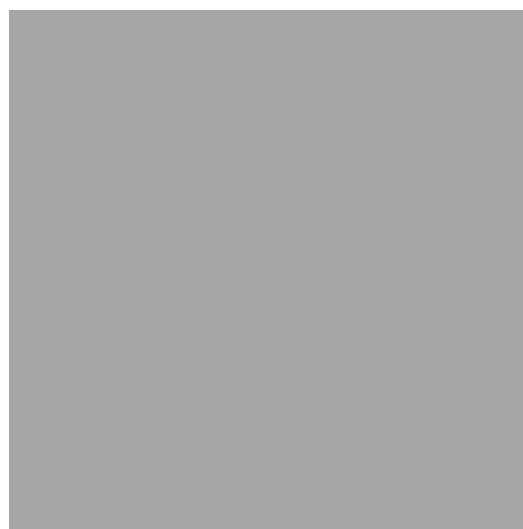
Timelines

Week of:

- Oct 12 Functional/technical development begins
- Dec 12 Focus Group #1
- Feb 27 Focus Group #2
- Apr 30 User acceptance testing
- May/Jun Community pilot
- TBD Full roll-out of portal to community



Questions?



York University User Group Kickoff



November 21, 2011





Agenda

- Intros
- Welcome to SciQuest
- Scope Review
- Methodology Overview
- Solution Demonstration



SciQuest Project Team

- **Steven Brian**
 - Client Delivery Manager
- **Lori Mathis**
 - Project Manager
 - **Phil Sabino**
 - **Meredith Blake**
 - Solution Consultant
- **Rob Spence**
 - Technical Consultant
- **Camille Parker**
 - Supplier Enablement Consultant

Welcome to SciQuest



“Big Picture”

- Shopping Basics

- Similar experience to online shopping
- Consistent shopping across multiple catalog vendors – a single interface
- Your organization determines which suppliers/vendors to use
- SciQuest loads these supplier catalogs (item details and prices) into our system; all of the information you see is specific to your organization
- Prices updated as needed or as often as required for your organization (annually, semiannually, monthly)
- Punch-out and hosted catalogs are available
- Option exists to allow users to buy off-catalog

- System Benefits

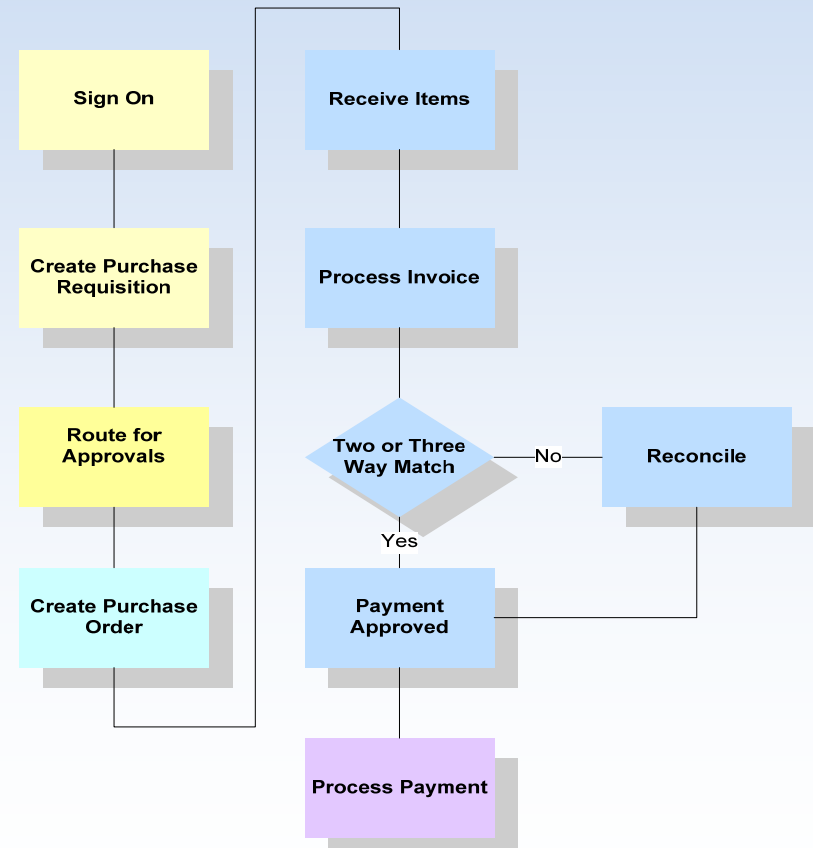
- Perform flexible searches to locate the item or items you need
- Compare prices and item details so that you can select the most appropriate item
- Build a shopping cart that contains items from multiple suppliers and categories
- Shop by category/commodity OR supplier
- Save items as favorites for future shopping
- Identify hazardous materials, radioactives, etc.

Key Terminology

Standard Roles:

- Shopper – These users can shop for items, but cannot submit a cart.
- Requestor – These users can shop for items and submit carts (that they created or were assigned from a shopper).
- Approver – These users can review (approve, reject, or return) purchase requisitions.
- Administrator – These are system administrators and can make changes to site configuration, user information, suppliers, etc.

Simple Process Flow:



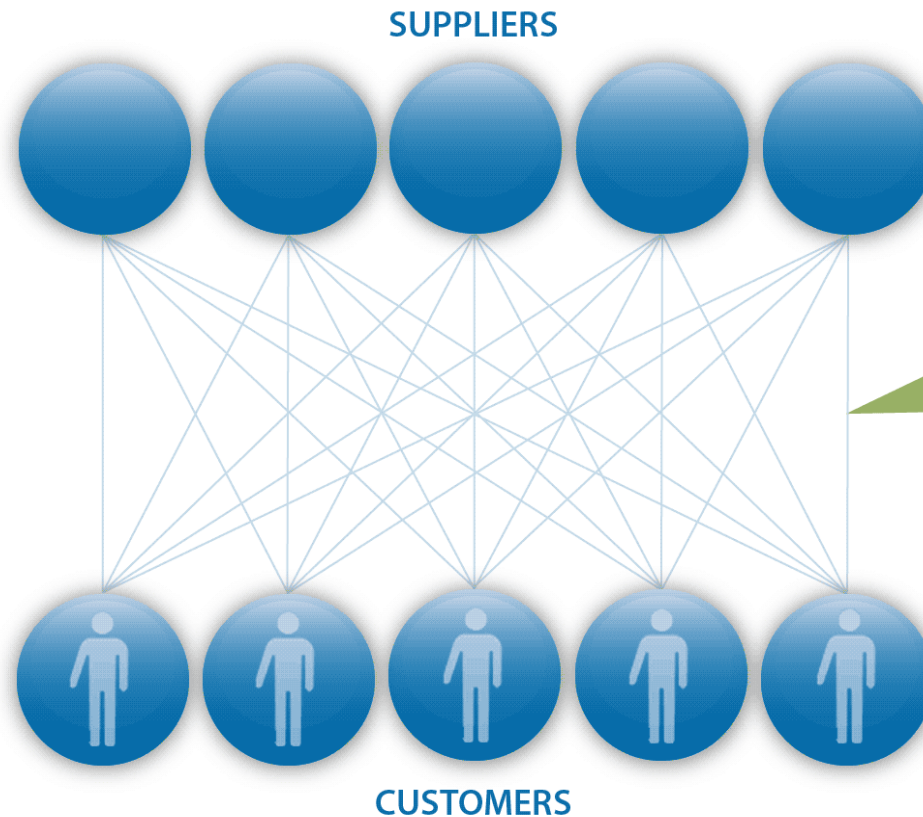
SciQuest P2P Solution



SciQuest is a leading provider of **strategic procurement and supplier management solutions**



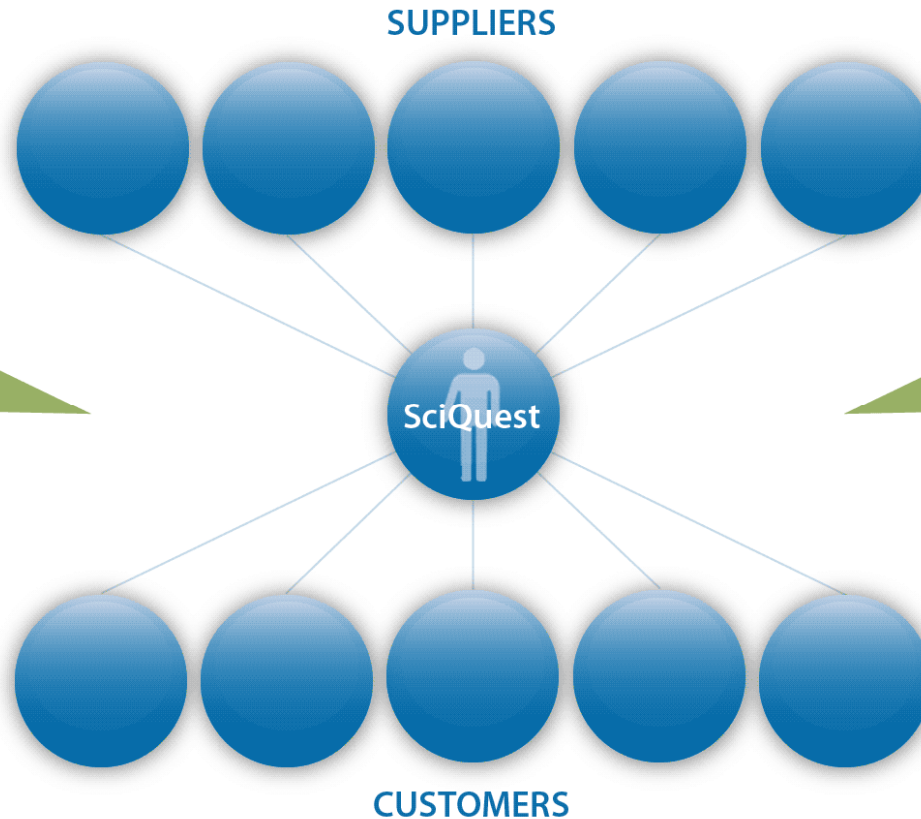
Traditional Supplier Management



Pain Points

- Costly, resource-intensive
- Non-standardized data
- Low supplier adoption
- Limited product choices
- Limited supplier selection

SciQuest Supplier Management



Managed Services

- Supplier connectivity
- Extensive product classification
- Centralized eCatalog
- Price/content management
- Transaction integrity
- Transaction tracking
- Customer support

eTransaction Data

- Purchase order
- Advanced ship notification
- Invoicing
- Receipt notification
- Contract data
- Payment data

User-Friendly Shopping Environment

Hosted
Preferred
Suppliers

Supplier
Punch-out

Internal
Suppliers
(stock-
rooms)

SciQuest
Science
Catalog

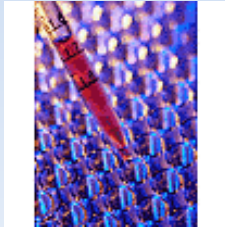
Services &
Non-
catalog
Items



- Automated, Standardized Processes
- User-friendly, familiar interface
- Preferred product positioning
- Scientific content and specialty searches
- Access to any supplier with a variety of methods
- Your products and pricing

Who benefits from this implementation?

End Users



- One-stop shopping experience
- Freedom of choice: wide range of suppliers and products from which to choose
- Fast, easy requisitioning

Procurement



- Control and visibility of spending
- Contract compliance
- Paperless process
- Error-free requisitions

Senior Management



- Reduced costs
- Increased purchasing and user productivity
- Better budgeting information

Information Technology



- Low maintenance software
- Secure, reliable access
- Straight-forward integration

Implementation Methodology



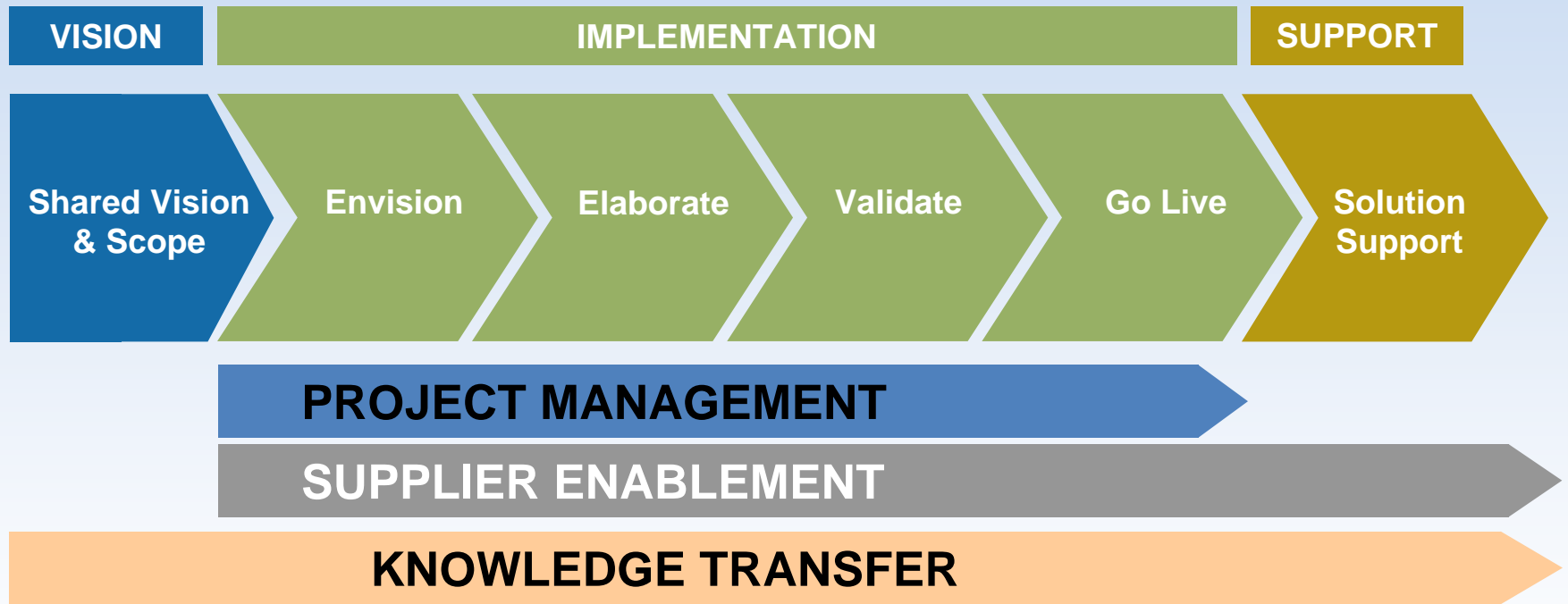
Methodology: Key Objectives

- Create a Collaborative & Transparent Environment
 - Drive towards key milestones
 - Visibility to all project activity
 - Establish customer “buy in” early in the process
- Accelerate Learning, Failure, and the realization of Value
 - Focus on customer business requirements, NOT solution features
 - Use focus groups to provide actual experience with the solution instead of discussing only high-level conceptual outlines
- Frontload Risk
 - Expose issues/gaps early, not late
 - Acknowledge work that has slipped
 - Align on challenges and how to address them
 - Correct the course of our journey as we go

Methodology: Key Objectives continued

- Deliver a solution with a high level of value
 - Explore and agree on York's goals for implementing the solution
 - Determine how we will measure progress toward these goals, both during implementation and after go live
 - If assumptions change as we work together, refine our definition of value
- Real People, Real Scenarios, Real Data
 - Demonstrate a real solution!

Solution Methodology



The Elaborate Phase



Elaborate

Elaborate

Kickoff

Initial Site Configuration

Focus Group 1

Solution Configuration

Focus Group 2

Final Specification (Test-ready Site)

Methodology: Focus Group Summary

- Objective
 - Challenge York to put the solution into Production tomorrow
- Process
 - Demonstrate business scenarios
- Roles
 - SciQuest
 - Facilitator: Facilitate and ensure the session objectives are achieved
 - Demonstrator: Demonstrate the business scenarios on the solution
 - Scribe: Document all change requests
 - York
 - Core Team: These people have been involved in the progress up to this point. Explain York business processes and provide input.
 - Extended Team: Subject Matter Experts and End Users. “Will the solution work for you?”
- Deliverables
 - Business Scenarios and Solution Log

Project Sprints

- SciQuest implementation work will be broken up into 2-week sprints
- Sprints are buckets of work spanning functional/business process, technical/integration, and supplier enablement.
- Sprints will be managed in Basecamp through To Do Lists (themes) and To Dos (tasks)
- SciQuest and York will meet at the end of each sprint to demonstrate to each other what was accomplished
 - Examples: shopping, requisition approvals, budget check, user authentication
- Work that was planned but not completed will move to a project backlog. Teams will collaboratively decide if backlogged work must be moved to next sprint, picked up some time in the future, or left on the backlog.

Milestone Tracker

Functional Sprints	Integration Sprints	Complete Date	Complete
1 - Gather Data & Begin Site Preparation	Login XML Begins	21-Oct	Yes
2 – Site Prep: Begin Forms & Workflow	Account Design Begins	4-Nov	Yes
3 - Core Team Demo of Initial Working Site	Supplier Sync Design Begins	18-Nov	Yes
4 - Preparation for Focus Group 1	PR Validation Design Begins Login XML Completes	9-Dec	
5 - Focus Group 1 & Follow-Up	PO Export Design Begins Account Code Completes	12-16-Dec 2-6 Jan	
6 - Process Solution Log & Invoice Setup	Invoice Export Design Begins Supplier Sync Completes	20-Jan	
7 - Setup of Invoice Workflow	Invoice Status Design Begins PR Validation Completes	3-Feb	
8 - Mini-Focus Group - Invoice Submission & Approvals	PO Export Completes	17-Feb	
9 - Prep and Conduct Focus Group 2	Invoice Export Completes	2-Mar	
10 - Review and Process Solution Log	Invoice Status Completes	16-Mar	
11 - Solution & Integration Closeout	Integration Revisions/Closeout	30-Mar	
12 - Solution Validation	Support Validation/Revisions	13-Apr	
13 - Retesting & Promotion to Production	Promote to Test	27-Apr	
14 - User Acceptance Testing	Support UAT/Revisions	11-May	
15 - Final Adjustments & Live Order Testing Begins	Promote to Production	25-May	
16 - Roll-Out Support & Transition to SQ Support	Support Production	8-Jun	

Let's Take a Look!



Questions?

