

# FACT SHEET: BUY2PAY EPROCUREMENT ROLL OUT



**HARVARD**  
Faculty of Arts and Sciences

## OBJECTIVE

Harvard University is implementing Buy2Pay, an online procurement system that provides an end-to-end online experience for the entire procurement process: from sourcing to buying and payment. Buy2Pay will replace the current procurement tool, Harvard Crimson Online Marketplace (HCOM), with University-wide roll outs scheduled from June – December 2020.

## OVERVIEW

### Why

Implementing Buy2Pay will reduce the administrative burden in Harvard's current procurement processes which are heavily dependent on moving paper and manual steps. The Buy2Pay procurement system will improve visibility between departments, Central Procurement and suppliers to answer the question "Has my vendor been paid?".

### Who

Select Harvard University employees who are designated by their Department to request or approve the purchase of goods and services on behalf of the University, as well as Central Procurement, will use Buy2Pay for procurement administration.

### What

Buy2Pay is a procurement software from Jaggaer, which has been configured for Harvard's business needs and compliance considerations. Buy2Pay will shift all procurement activities from today's heavily paper dependent processes to an online procurement process, similar to an e-commerce experience.

There are three assigned user roles in the Buy2Pay system:

- A **Shopper**, who builds a cart and assigns it to a Requester.
- A **Requester**, who receives assigned carts or builds carts, adds/edits the Chart of Accounts coding, and submits the cart to an Approver.
- An **Approver**, who reviews and approves carts for their department in a dollar threshold queue.

### When

Five roll out phases are scheduled through calendar year 2020, beginning with an Early Adopter phase in April 2020, and additional phases planned in June, August, October, and November 2020. FAS departments will be scheduled into one of the roll out phases. Departments with a phase preference should contact FAS Administrative Operations for scheduling.

Instructor led and online training will be available prior to roll out. Requestors and Approvers are required to attend ROPPA and Buy2Pay training before they gain access to the system - both training formats will satisfy this requirement.

### Where

Users will log in to Buy2Pay online from the [Harvard Financial Systems](#) page, just like HCOM. Support materials will be available on the [FAS Administrative Operations Buy2Pay Project Resources](#) page, and the [Strategic Procurement Buy2Pay](#) page.

HCOM transaction data will not be transferred to Buy2Pay. As a result, HCOM will remain the system of record for transactions prior to Buy2Pay and will be accessible for data look up only for the foreseeable future.

## FEATURES

- **End user visibility for procurement processes.** Real time procurement workflow statuses are visible in Buy2Pay, and both the end user and Central Administration will have access to the same system screens.
- **Queue based approvals.** Approvers will be assigned to a transaction queue based on dollar threshold and tub/org. Multiple approvers can be invoked throughout the process, reducing the risk of a stalled approval due to staff outages. Approvers can save filters on their queues to find relevant transactions by Chart of Accounts or other fields.
- **Cart consolidation.** Requesters will have the ability to consolidate shopping carts from multiple shoppers.
- **E-invoicing.** Vendors and departments will have online, paperless options for submitting invoices including emailing electronic invoices and vendor direct uploads into the system.
- **Bulk look up and system actions for multiple POs.** Administrators will be able to copy and paste rows of PO numbers into the Buy2Pay search bar, allowing them to act on multiple POs at once.
- **Enhanced reporting and auditing within the system.** Users can access audit trails, workflow statuses, and other information directly from a requisition, allowing them to research and act on a PO within the same system.
- **Commonly used forms library in the application.** Required requisition attachments, such as the Independent Contractor Questionnaire (ICQ) or the Vendor Justification Form (VJF), are available in the Buy2Pay forms library.

## BENEFITS

- **Enables paperless procurement processes.** All paperwork (invoices, supporting attachments) in the procurement process will be electronic.
- **Provides system transparency to all users.** Workflows and transaction information are visible and consistent for all users: Shoppers, Requesters, Approvers, and Central Administration.
- **Cost Savings.** Buy2Pay will incorporate negotiated contracts and preferred suppliers to drive increased savings.
- **Provides automated Debarment verification.** Buy2Pay will automatically verify and record that suppliers have not been debarred, removing the need for Debarment forms.

## RESOURCES

- [Buy2Pay Supplier Portal](#) (live as of June 2019)
- [Procurement Policy \(University Financial Policy Office\)](#)
- [FAS Administrative Operations Buy2Pay Project Resources](#)

## QUESTIONS

For questions about FAS-related purchases, the Buy2Pay Supplier Portal, or questions about the transition to the Buy2Pay eProcurement system, email [fasprocurement@fas.harvard.edu](mailto:fasprocurement@fas.harvard.edu). For general questions about the Procurement Policy or other University financial policies, contact the University Financial Policy Office ([financialpolicy@harvard.edu](mailto:financialpolicy@harvard.edu)).