Buy2Pay Supplier Portal Overview

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Agenda

• Buy2Pay Project Overview

• Buy2Pay Supplier Portal

• Next Steps
Buy2Pay Benefits and Objectives

### User Friendly Shopping Experience
- Easy and intuitive interface enabling community members to buy what they need in compliance with University and government policies
- Convenience of one-stop shopping without the guesswork

### System Alignment on Business Policy, Processes and Approval Workflows
- Seamless processing of orders and payments completed with speed and accuracy
- Transparent, highly visible workflows with information available to shoppers, approvers, and vendors

### Enhanced Analytics and Reporting
- Relevant information readily available
- Ability to make informed business decisions using dashboards, metrics, reports, and alerts

### Increased Savings and Risk Mitigation for the University
- Better visibility into negotiated contracts and preferred suppliers creating opportunity for increased savings
- Risk mitigation through incorporation of sponsored research rules and policies
Buy2Pay Overall Project Timeline

**FY19**

- Design & Configuration, Validation, Testing & Training
- **DESIGN, BUILD, INTEGRATE & TEST SOLUTION**
- **TRAINING DEVELOPMENT**
- **POLICY AND PROCESS ALIGNMENT**
- **Supplier Portal**
  - 04/29/19

**FY20**

- Phased Go-Live Rollouts
- **COMMUNICATIONS & TRAINING DELIVERY**
- **PHASED GO-LIVE ROLLOUTS**

**Change Management & Organizational Readiness**
## Buy2Pay Module Definitions

<table>
<thead>
<tr>
<th>Module</th>
<th>Description</th>
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<tbody>
<tr>
<td><strong>SUPPLIER MANAGEMENT</strong></td>
<td>The Supplier Portal allows suppliers to enter and maintain their contact, tax and payment information and also accommodates white glove registration by departments. This module automates some compliance checks, including debarment, and offers robust search features for users.</td>
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<tr>
<td><strong>SOURCING</strong></td>
<td>A centralized module for procurement sourcing actions required by financial policy such as soliciting bids, tracking RFPs, and awarding contracts. Used in conjunction with Buy2Pay reports and analytics, this module could potentially help the university recognize cost savings through strategic supplier sourcing.</td>
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<tr>
<td><strong>CONTRACTS</strong></td>
<td>A contract database and end-to-end management tool. Users can automate the authoring, redlining and signing of contracts and store executed contracts. Users can receive alerts about upcoming contract renewals or actions.</td>
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<tr>
<td><strong>ePROCUREMENT</strong></td>
<td>This module guides users through the buying process in the marketplace or for non-catalog items and gives users visibility into available and preferred supplier options. Users can link PO information to other modules, route invoices, and track payment status.</td>
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<tr>
<td><strong>SPEND ANALYTICS</strong></td>
<td>This module provides reporting and analytics to assist central procurement and schools in analyzing their spend with particular suppliers or types of spend categories. The University could potentially recognize savings through negotiating volume and early payment discounts, and leveraging campus-wide buying power.</td>
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What is a Supplier?

A supplier is an **individual or company** that provides **goods or services** to Harvard
Supplier Portal Deployment Strategy

The Supplier Portal allows suppliers to enter and maintain their contact, tax and payment information and also accommodates white glove registration by departments. This module automates some compliance checks, including debarment, and offers robust search features for users.

- Supplier Portal will go live university-wide on **April 29, 2019**
- Allows users to begin to realize our expected benefits sooner
- The Supplier Portal is the building block for rolling out other modules - need Suppliers for Contract and Sourcing modules
Benefits of Buy2Pay Supplier Portal

• Provides self-service platform for suppliers to enter their own data and maintain it going forward

• Offers ability for supplier to transmit sensitive documents securely

• Enhances registration status visibility & searching for active vendors etc.

• Improves compliance through automated validation including debarment checks

• Accommodates proxy registrations
* Department approvals are no longer needed on vendor requests.
Buy2Pay User Dashboard
Invite a Supplier to the Supplier Portal
Supplier Registration Workflow Visibility
## Supplier Portal Organizational Readiness Timeline

<table>
<thead>
<tr>
<th>B2P Project Team Tasks</th>
<th>Start</th>
<th>End</th>
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<tbody>
<tr>
<td>UAT sessions with school participation</td>
<td>02/12</td>
<td>02/21</td>
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<tr>
<td>Provide UAG with training plans and dates</td>
<td>02/21</td>
<td>02/21</td>
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<tr>
<td>Post-UAT Walk Through (live and WebEx)</td>
<td>03/01</td>
<td>03/07</td>
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<tr>
<td>Develop Training Content and Support Materials</td>
<td>03/01</td>
<td>03/29</td>
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<tr>
<td>Material Review and Revision (concurrent with development)</td>
<td>03/10</td>
<td>03/29</td>
</tr>
<tr>
<td>Post Training Content and Support Materials to Training Website</td>
<td>03/27</td>
<td>03/29</td>
</tr>
<tr>
<td>Training Delivery</td>
<td>04/01</td>
<td>04/26</td>
</tr>
<tr>
<td>Clean up VRF requests in Oracle</td>
<td>04/01</td>
<td>04/22</td>
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<tr>
<td><strong>Sunset Vendor Request Form (VRF)</strong></td>
<td>04/26</td>
<td>04/26</td>
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<tr>
<td>Go - Live</td>
<td>04/29</td>
<td>04/29</td>
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</table>
Next Steps for Departments

• Look for email with list of current VJF Requestors and Approvers and their transaction volume at the end of March

• Determine which staff should have Requester access to the supplier portal
  • No Approver role like in HCOM
  • Requesters will be responsible for entering in supplier names and email addresses for invitations or completing proxy registrations
  • Potential to reduce number of users in departments

• Encourage Requesters to attend recommended FAS Supplier Portal training coming in April 2019