

HARVARD
FACULTY OF ARTS AND SCIENCES



ADMINISTRATIVE OPERATIONS

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

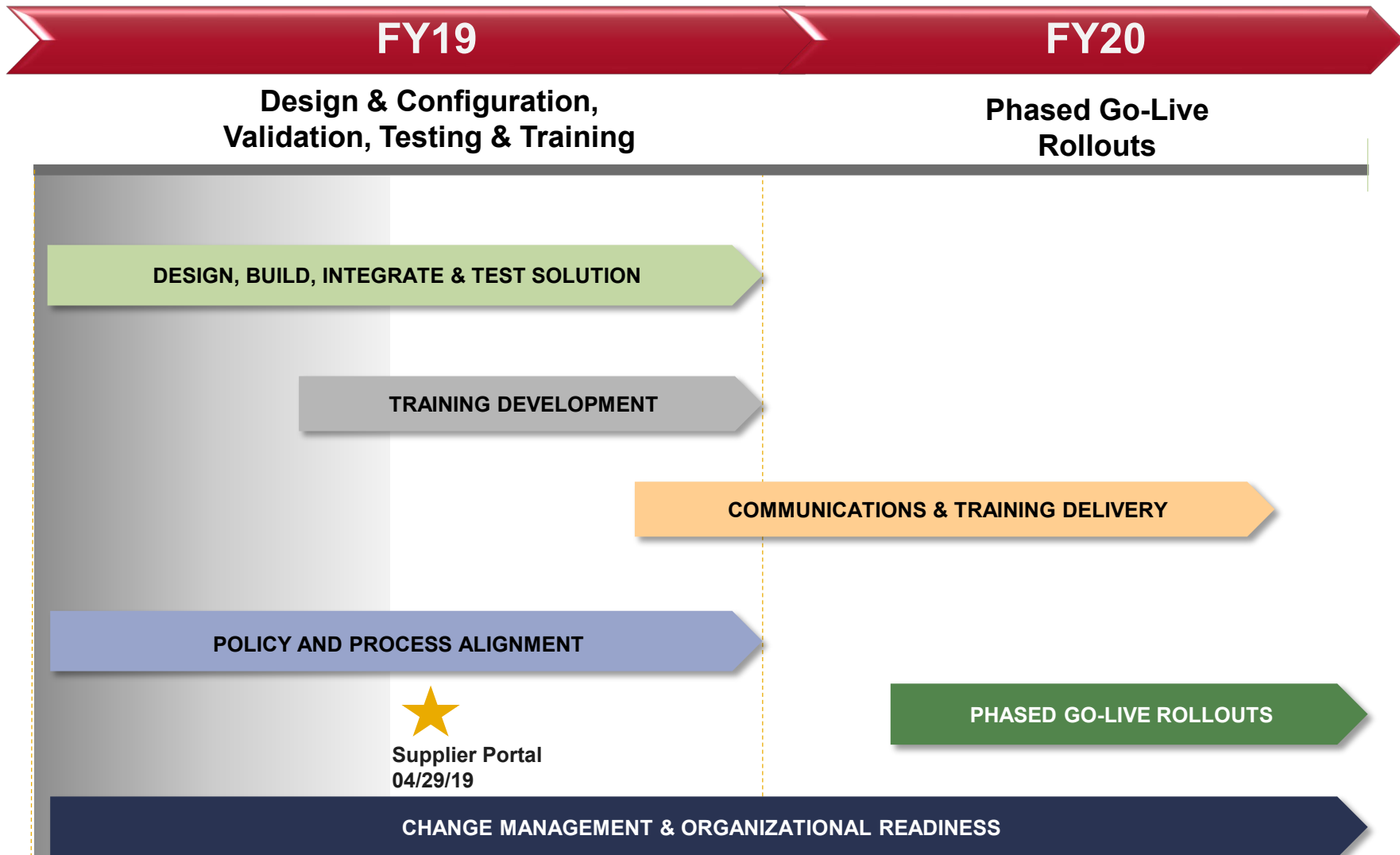
- Relevant information readily available
- Ability to make informed business decisions using dashboards, metrics, reports, and alerts



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



Buy2Pay Module Definitions



Buy2Pay Solution

Single platform that simplifies, streamlines, and removes guesswork in the procurement process



SUPPLIER MANAGEMENT



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.

SOURCING



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.

CONTRACTS



A contract database and end-to-end management tool. Users can automate the authoring, redlining and signing of contracts and/ or store executed contracts. Users can receive alerts about upcoming contract renewals or actions.

ePROCUREMENT



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.

SPEND ANALYTICS



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.

What is a Supplier?

A supplier is an **individual or company** that provides **goods or services** to Harvard



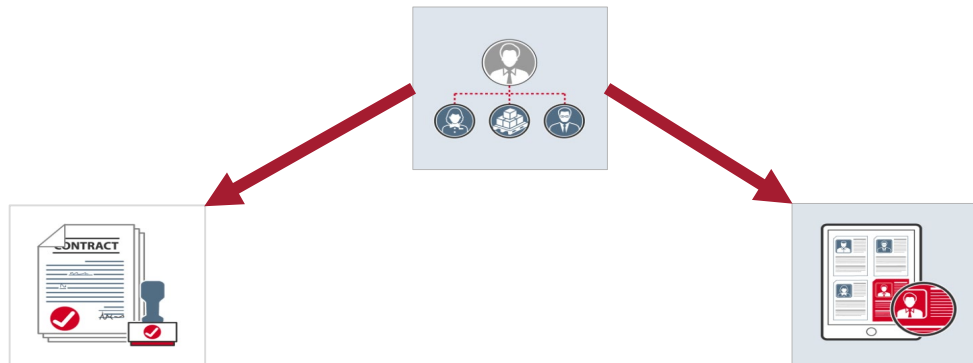
Supplier Portal Deployment Strategy

SUPPLIER MANAGEMENT



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

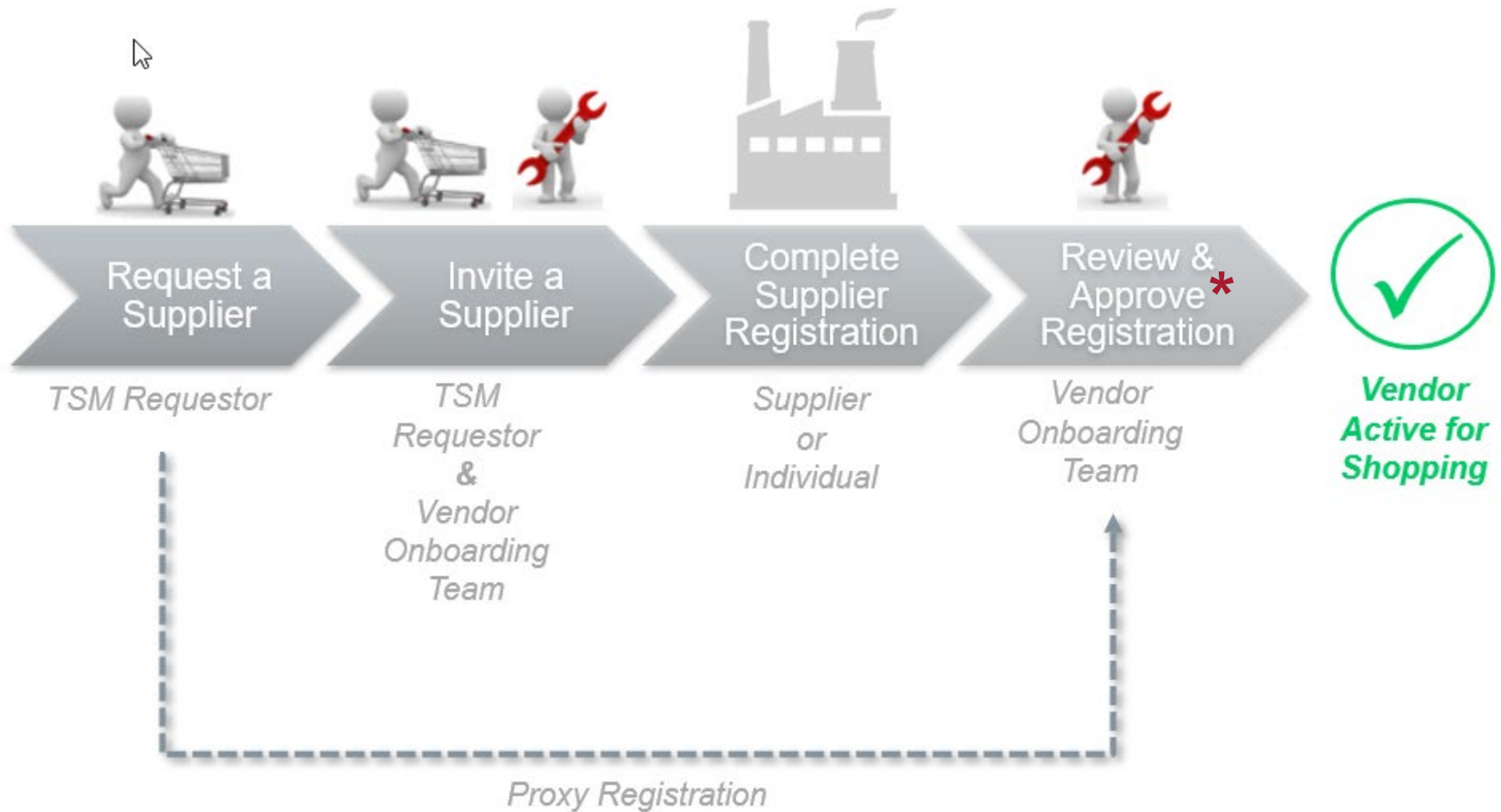


Benefits of Buy2Pay Supplier Portal

- 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



Supplier Portal Workflow



*** Department approvals are no longer needed on vendor requests.**

Buy2Pay User Dashboard

buy2pay

TSM User ★ 🚩 🔔 🛒 0.00 USD Search (Alt+Q) ?

Shop > Shopping > Shopping Home > Marketplace Dashboard

Marketplace Dashboard

Organization Message

Welcome to the Harvard eProcurement Test Environment

Supplier Tools

- Search for a Supplier
- Request New Supplier
- Invite New Supplier
- Supplier Maintenance Request
- My Supplier Requests

Shop

Search Product Keywords, Description, Supplier, Manufacturer [Advanced Search](#)

Shortcuts Favorites | Forms | **Browse** Suppliers | Contracts

Showcases

You do not have access to any showcases selected for this widget. Please contact your system administrator or help desk.

Invite a Supplier to the Supplier Portal

The screenshot displays the 'buy2pay' Supplier Portal interface. At the top, the user is identified as 'TSM User' with a search bar and a currency indicator of '0.00 USD'. The breadcrumb trail shows 'Shop > Shopping > Shopping Home > Marketplace Dashboard'. A banner for 'JAGGAER revised its Service Privacy Policy' is visible. The main content area is titled 'Marketplace Dashboard' and includes an 'Organization Message' and 'Supplier Tools' section. The 'Supplier Tools' section lists: 'Search for a Supplier', 'Request New Supplier', 'Invite New Supplier', 'Supplier Maintenance Request', and 'My Supplier Requests'. A modal window titled 'Add Supplier' is open, containing the following fields: 'Registration Type' (dropdown menu with 'Corporation' selected), 'Supplier Name', 'First Name', 'Last Name', 'Email Address', and 'Confirm Email Address'. A legend indicates that fields with an asterisk are required. At the bottom of the modal are two buttons: 'Invite Supplier to Register' and 'Close'.

Supplier Registration Workflow Visibility

The screenshot displays the 'buy2pay' system interface for a supplier profile. The left sidebar contains navigation options: Home, Shop, Documents, Contracts, Suppliers (selected), and Reporting. The main header shows the user as 'TSM User' and the breadcrumb path: Suppliers > Manage Suppliers > Search for a Supplier > Supplier Profile - The Charles Hotel. Below the breadcrumb, there are navigation links for 'Back to Results' and '5 of 5 Results'. The supplier profile for 'The Charles Hotel' is shown, including 'Doing Business As : The Charles Hotel Catering', 'Registration Status: Profile Complete', and 'Registration Type: Corporation'. The 'Supplier Registration Workflow' section shows a sequence of steps: 'Submitted 2/19/2019 10:45 AM', 'Perform OFAC Check' (Completed), 'Oracle Duplicate Check' (Completed System), 'Vendor Management Review' (Active, View approvers), 'Sync to ERP' (Future), and 'Finish'. A 'Supplier Actions' dropdown menu is visible on the right.

Supplier Portal Organizational Readiness Timeline

B2P Project Team Tasks	Start	End
UAT sessions with school participation	02/12	02/21
Provide UAG with training plans and dates	02/21	02/21
Post-UAT Walk Through (live and WebEx)	03/7	03/7
Develop Training Content and Support Materials	03/01	03/29
Material Review and Revision (concurrent with development)	03/10	03/29
Post Training Content and Support Materials to Training Website	03/27	03/29
Training Delivery	04/01	04/26
Clean up VRF requests in Oracle	04/01	04/22
Sunset Vendor Request Form (VRF)	04/26	04/26
Go - Live	04/29	04/29

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

