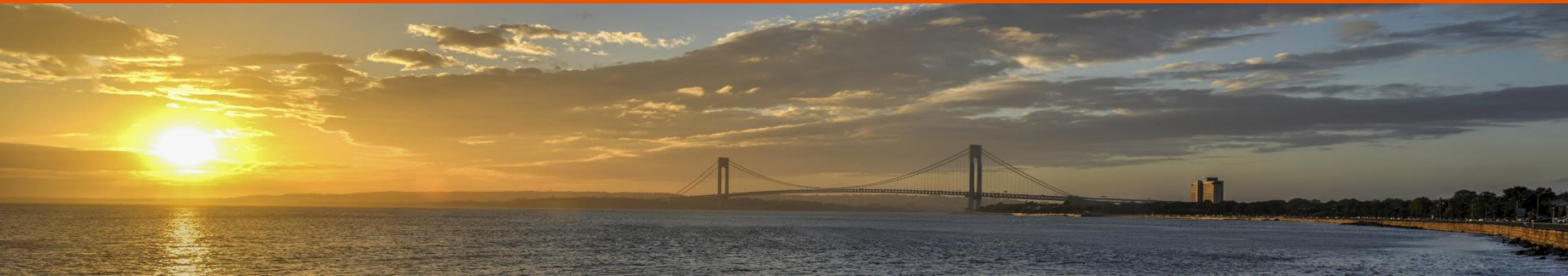
NEW YORK STATE OF OPPORTUNITY.

2015 Purchasing Forum & Trade Show

NYS eMarketPlace & eInvoicing Project & SFS Changes

Opportunities on the Horizon

May 20 & 21, 2015



Today's Panel

- Susan Filburn

  OGS Procurement Services, Deputy Chief Procurement Officer
- Erin Boyce

  OGS Procurement Services, Team Leader for Data Analytics
- Paul Kalinowski

  SFS, eProcurement Lead
- Robert Lehmann

  OSC Bureau of State Expenditures, Supervisor of Vendor Management Unit

Agenda

- eMarketPlace
- Item Master
- SFS Integration & Purchasing Impacts
- eInvoicing
- Questions

eMarketPlace

NYS eMarketPlace

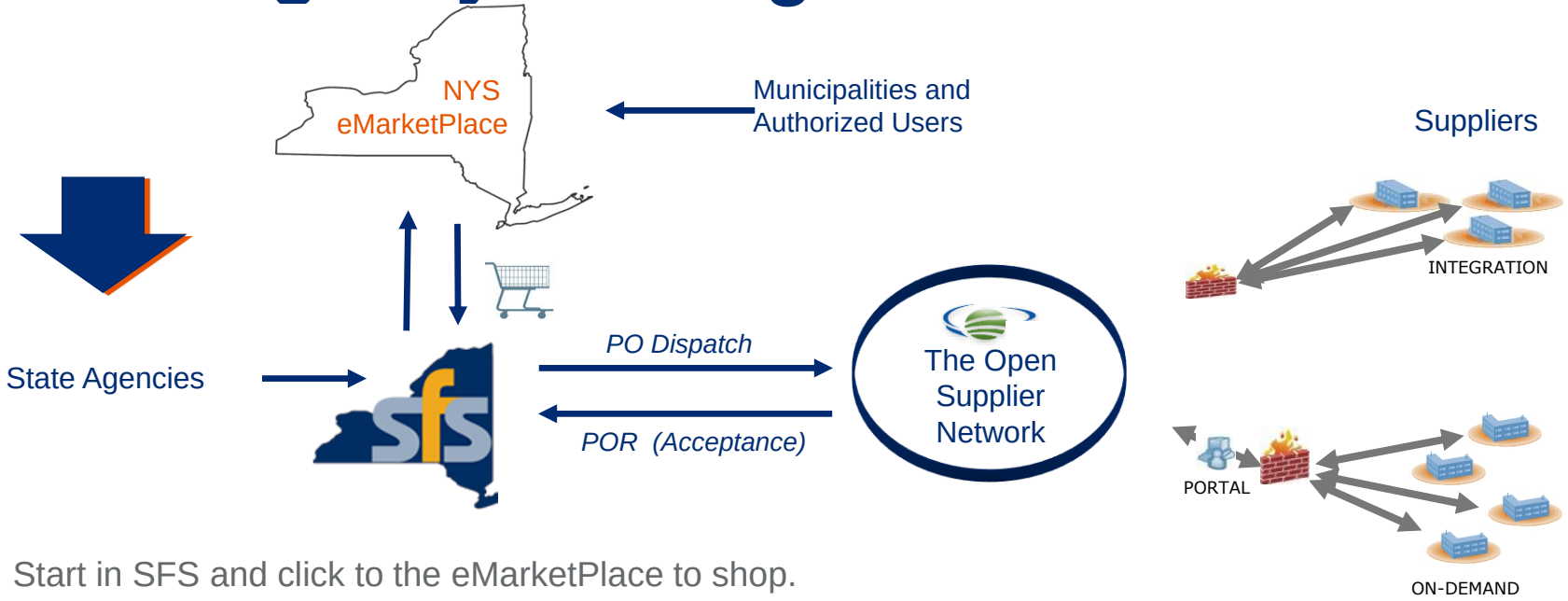
- An online “Amazon-like” shopping site for New York State agencies, municipalities, and other authorized users to purchase goods from centralized contract suppliers in one collaborative online environment.
- Electronic purchase order dispatch and supplier invoice submission capabilities integrated with the Statewide Financial System (SFS).

Many states have already incorporated catalog sites into their eProcurement solutions (GA, AZ, VA, TN)

Goals of eMarketPlace

- Create a more efficient, streamlined, and modern purchasing process for all contract users.
- Facilitate standardized management of statewide contracts, products, and pricing.
- Provide structure and organization to purchasing data for better records and analysis.

State Agency Catalog Process



- Start in SFS and click to the eMarketPlace to shop.
- Return to SFS with your shopping cart.
- Your shopping cart becomes a purchase requisition (PR) and follows the normal PR/PO process.
- Once approved, the PO is sent electronically to Perfect Commerce's Open Supplier Network (OSN).
- Supplier receives the PO & sends receipt back to SFS to fulfill the order.

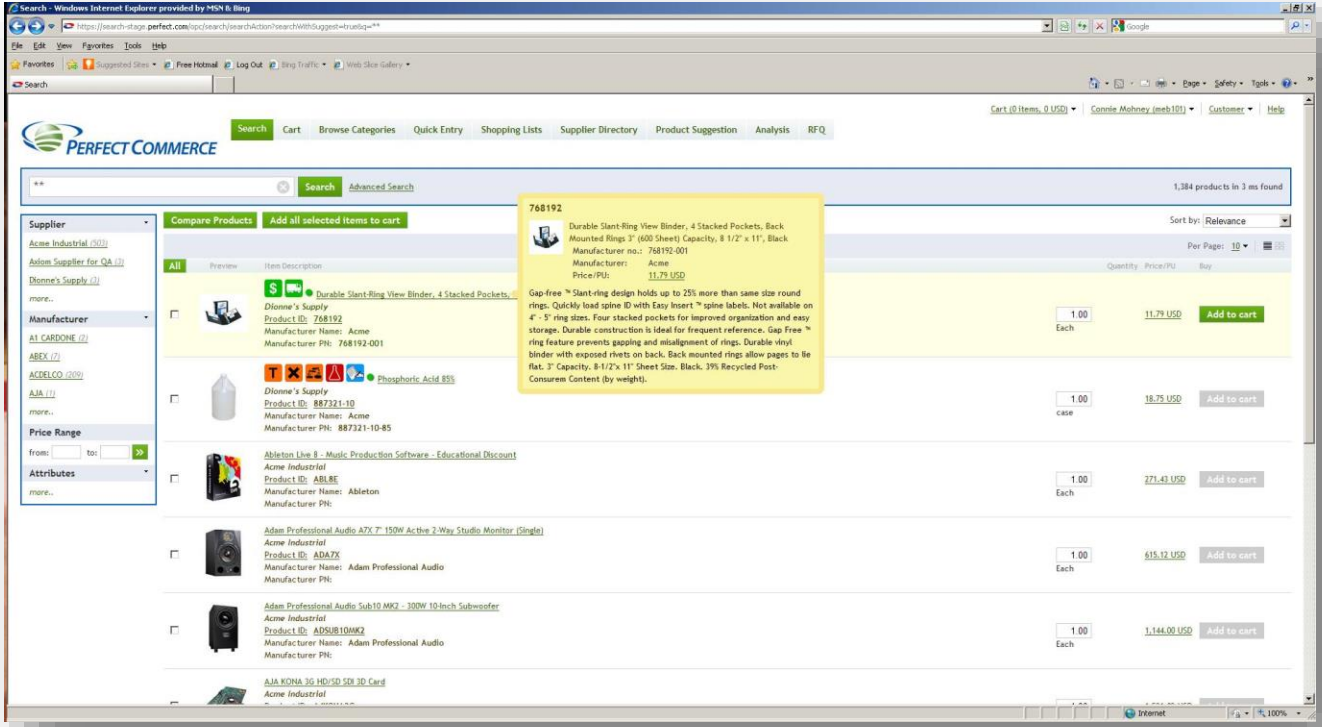
Pilot Phase

- Working with a small group of vendors and users to test the system (inside and outside of SFS 9.2)
- Pilot Vendors:
  1. New York State Department of Correctional Services Division of Industries (Corcraft)
  2. New York State Preferred Source Program - (Blind and visually impaired)
  3. New York State Industries for the Disabled
  4. Unisource Worldwide
  5. Paper Mart Inc.
  6. Lindenmeyr Munroe
  7. WW Grainger

Implementation Timeline

- January 2015 to May 2015: Pilot and testing phase
- June 2015 to October 2015: Soft Go-Live
  - Auto-Sourcing pilot agencies and limited # of buyers
  - No SFS integration; P-card and Bill-Me-Later only
- October 2015: Full Go-Live
  - All online SFS agencies
  - SFS integration relies on EE1 9.2 upgrade
- Ongoing: Content Expansion
  - Continue adding contract awards to eMarketPlace
  - Estimated 12-18 months for full commodity portfolio

eMarketPlace Search Page



Item Master

What is an Item Master?

- A database of unique identification numbers, descriptions, and other attributes that describe objects of the same form, fit, and function.
  - Description: Item, descriptor 1, descriptor 2, descriptor 3
    - Forklift, propane, 5K lb cap
    - Chair, task, mesh
    - Gloves, nitrile, small
  - Item ID#: Unique identifying number
    - Auto-generated 8-digit alphanumeric (like E0001234)
    - Smart-coded for OEM Stockpile only

Goals of Item Master

- Consistency
  - Standard purchasing categories
  - Simplifies creation of requisitions and purchase orders
- Data Quality & Spend Intelligence
  - Creates clean, usable data from purchasing activity
  - More detailed than current data
  - Data is organized and can be used to analyze spending
  - This will help us create smart decisions about procurement moving forward
- Inventory Controls
  - Enable and expand use of SFS inventory module

Levels of Classification

General

Appropriation	Supplies & Materials
Account	Office Supplies
Category	Mechanical Pencils
Item	Pencil, Mechanical, .7mm
NEW Manufacturer Info	BIC Model MPLP241-BLK
Product Info	Staples SKU 711520

Specific

Classification Data in the eMarketPlace

- OGS Procurement Services will assign classification data to all products in the eMarketPlace, including:
  - Category Code
  - Account Code (but you can change it)
  - Item ID and Description
  - Unit of Measure
  - Price
- When a product is selected and the SFS Purchase Requisition is populated, this data will be filled in.

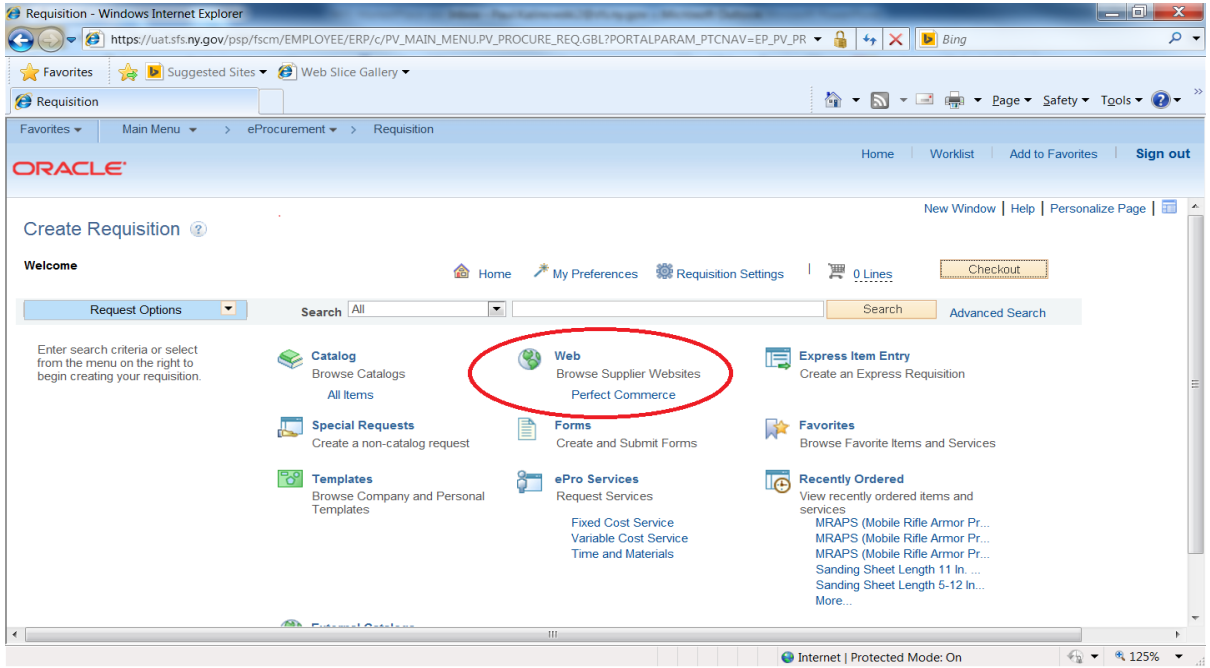
Phases of Item Master Implementation

- Complete/Maintenance Stage
  - DHSES OEM Emergency Stockpile
- In Progress
  - DHSES traditional inventory
  - eMarketPlace Catalog products
- Future
  - Other Agency traditional inventory
  - Products for use in SFS eProcurement (non-eMarketPlace)
  - Agency-requested items for spend intelligence

SFS Integration & Purchasing Impacts

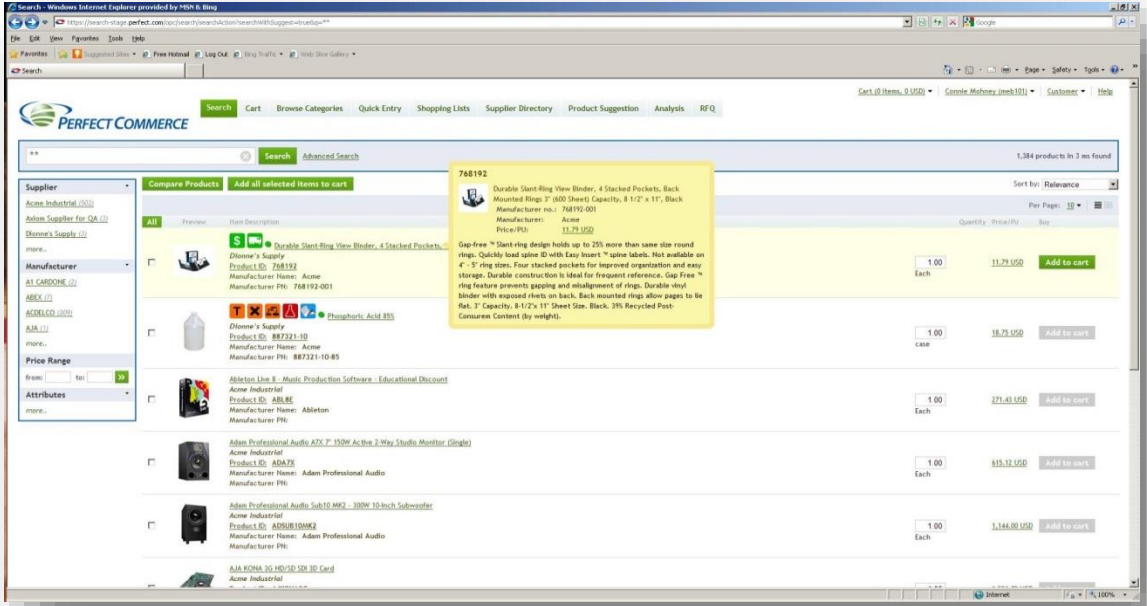
SFS User Access to Catalogs

Requestors in SFS will access catalogs via eProcurement and create a Web Requisition.



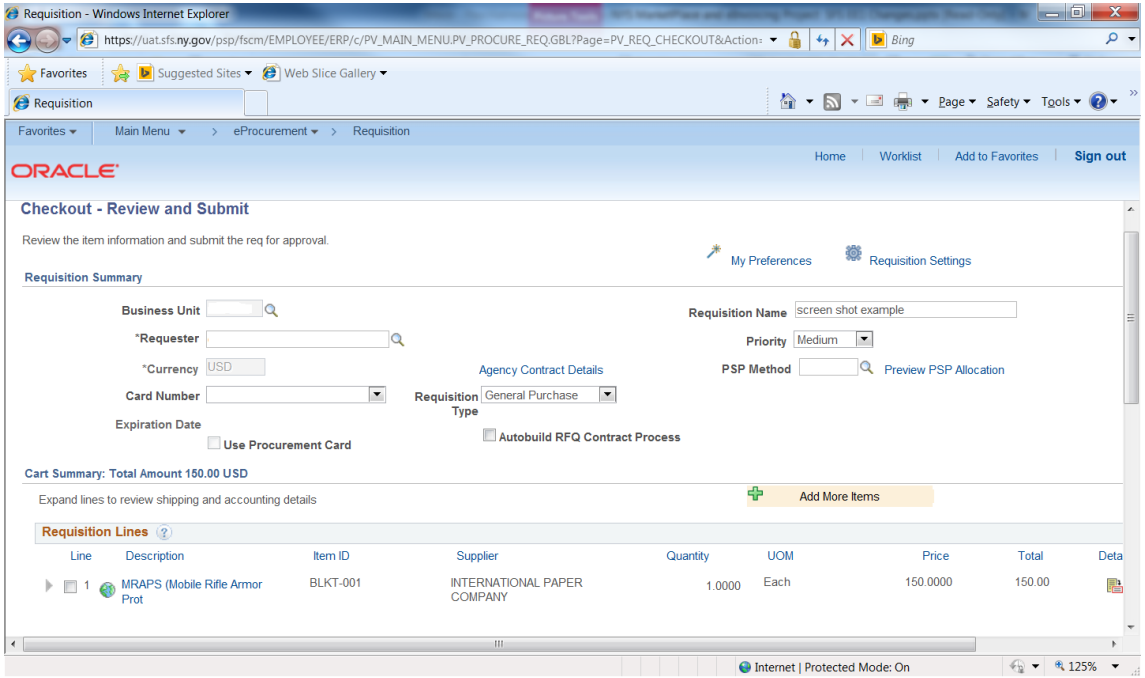
SFS User Access to Catalogs

- Creating this requisition will bring the user automatically to the catalog site.
- User will need no additional User ID or login information.



SFS User Access to Catalogs

- When the user checks out of the catalog site, a requisition is built in SFS.
- Requisition includes all product information and can now be submitted for approval.



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SFS Transaction Processing

- Once the requisition is approved it can be sourced to a purchase order (PO).
  - Manually by a PO processor, or
  - Automatically using auto-sourcing

- After the PO is approved it will be automatically dispatched to the supplier electronically.
  - PO can include procurement card information delivering both the PO and payment method together in a single transaction

SFS Transaction Processing

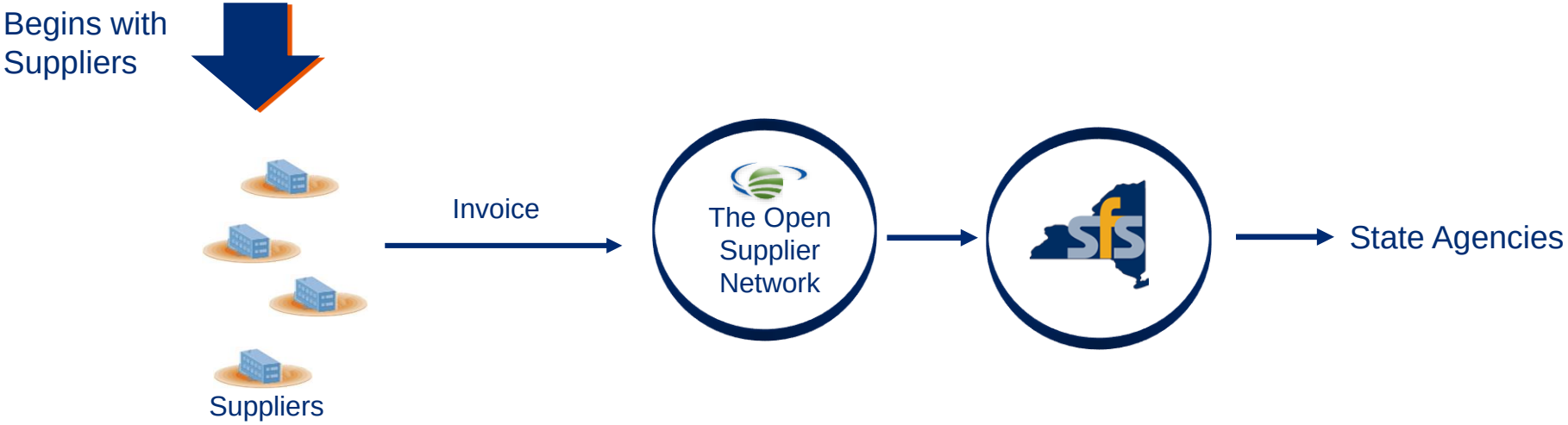
- Purchase orders will not need to be signed
  - “Authorized Electronically”
- Where a procurement card is not used, invoices will be received electronically
  - Electronic invoices received will be automatically built into regular vouchers in AP greatly reducing data entry efforts

eInvoicing

Goals of eInvoicing

- Reduce the amount of paper for the supplier and the state
- Streamline and expedite the payment process
- Use state resources more efficiently
- Improve suppliers' experiences with the state

State Agency eInvoicing Process



- Supplier fulfills the order and submits an einvoice through the Open Supplier Network
- Perfect Commerce transmits the invoice to eSettlements for processing and settlement.

Impact of eInvoicing

Supplier	Average PO's	Average Vouchers
Initial Pilot Suppliers	**Per Month**	**Per Month**
CORCRAFT	1215	NA
NEW YORK STATE INDUSTRIES FOR THE DISABLED	817	1024
INTERNATIONAL PAPER COMPANY	108	48
PAPER MART INC	82	54
WW GRAINGER	506	772
LINDENMEYR MUNROE DIVISION OF CENTRAL	12	9
NATIONAL INDUSTRIES FOR THE BLIND	481	263
Monthly Total	**3221**	**2171**
Onboarding for July 1st		
CARDINAL HEALTH	633	3040
STAPLES	377	1232
OROGRAIN	90	561
SYSCO ALBANY	75	638
BYRNE DAIRY	34	383
METROPOLITAN FOODS	28	433
Monthly Total	**1238**	**6287**
Grand Monthly Total	**4459**	**8459**

Eliminate 50k+ paper invoices per year!

eInvoicing Rollout Strategy

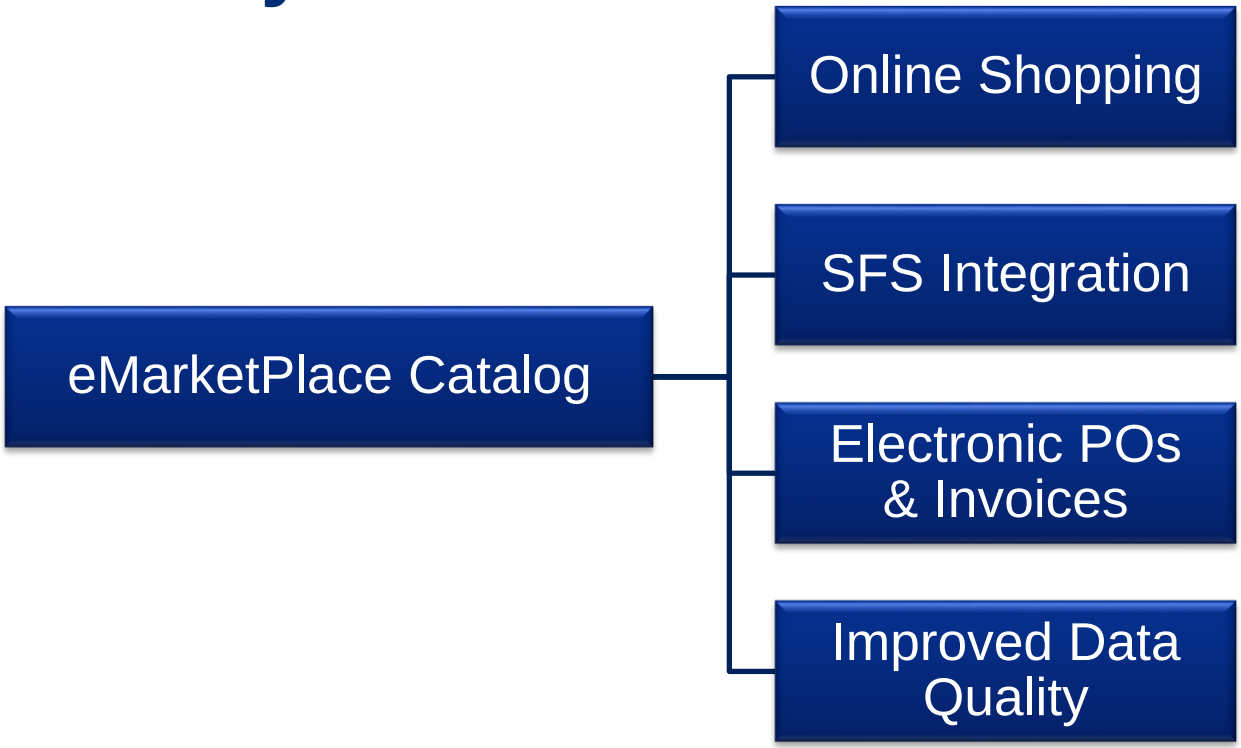
No attachments

1. Pilot vendors
2. Centralized commodity contract vendors currently in the PC OSN
3. Other centralized commodity contract vendors
4. Agency commodity contract vendors
5. Non-contract commodity vendors (high volume)
6. Service contract and non-contract vendors currently in the PC OSN
7. Other centralized service contract vendors

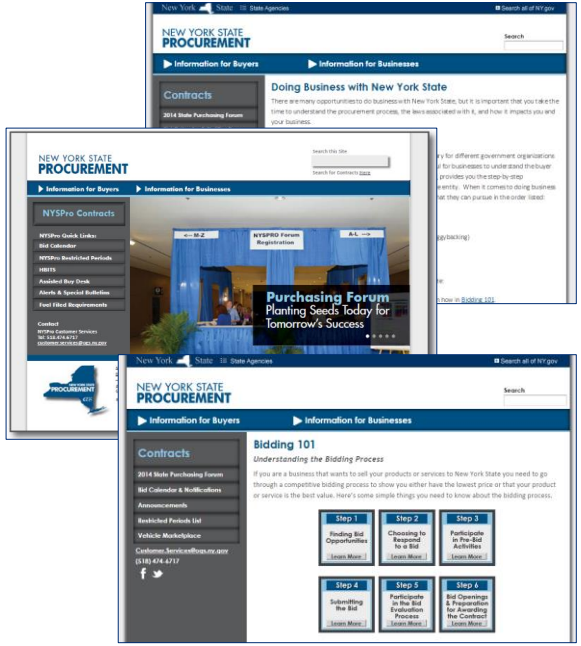
With attachments

8. Service and commodity vendors currently in the PC OSN
9. Other service and commodity vendors
10. High volume non-contract service and commodity vendors

Summary


eMarketPlace Catalog
Online Shopping
SFS Integration
Electronic POs & Invoices
Improved Data Quality

Website & Contact Information



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(518) 474-6717

customer.services@ogs.ny.gov

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Questions?