



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, Procure to Pay Lead

- Robert Lehmann

OSC Bureau of State Expenditures, Supervisor of Vendor Management Unit



Agenda

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



eMarketPlace



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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)

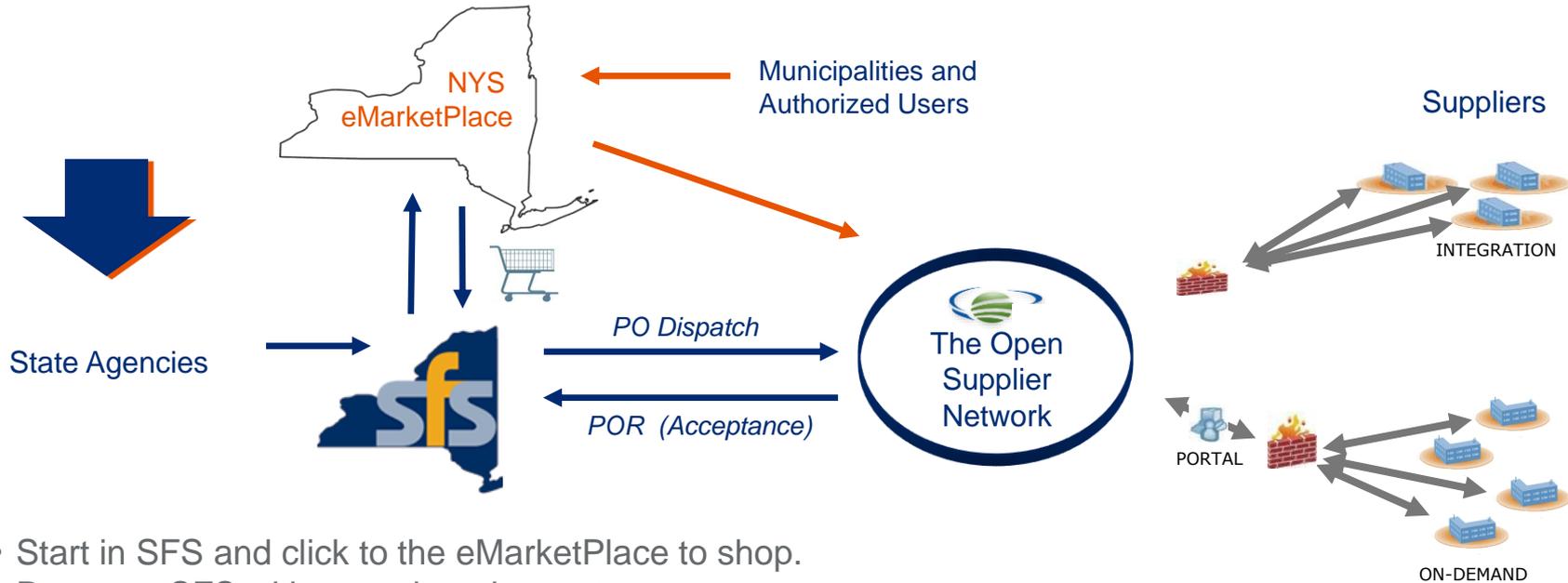


Goals of eMarketPlace

- 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

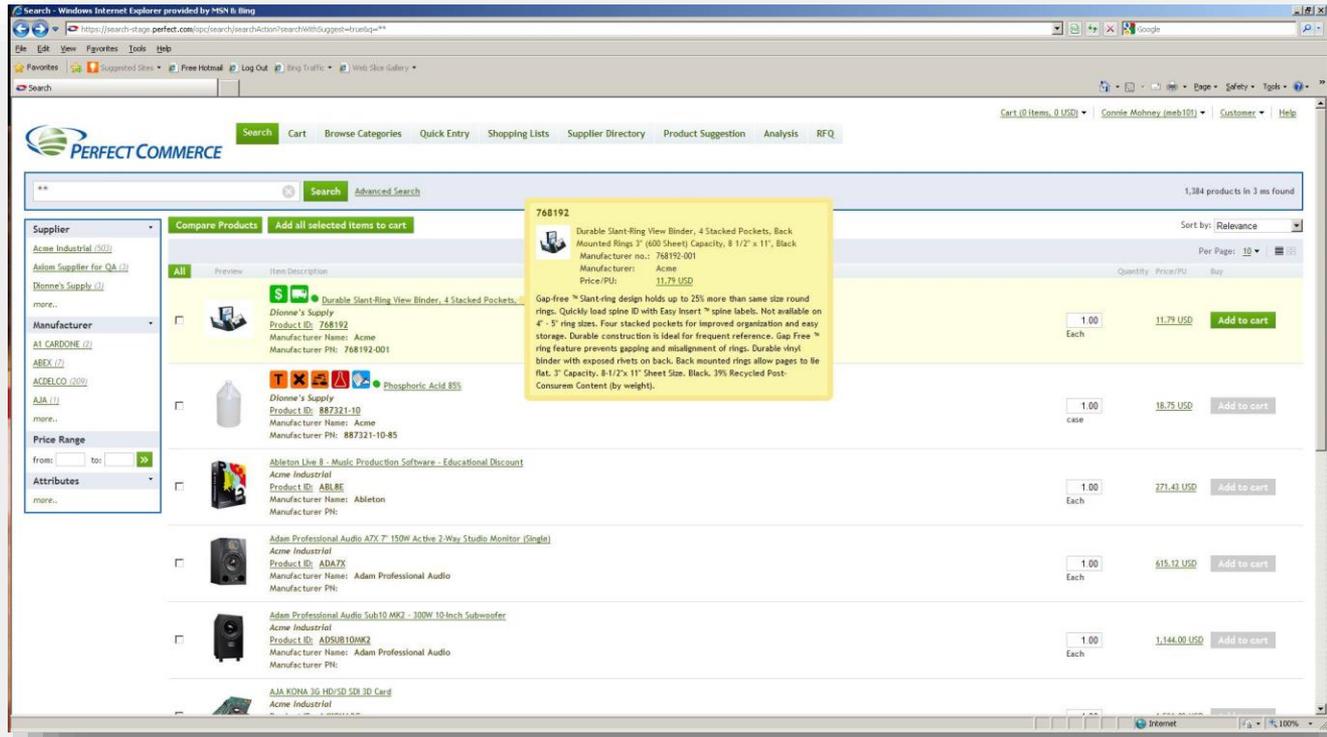


Implementation Timeline

- January 2015 to May 2015: Pilot and testing phase
- June 2015 to October 2015: Soft Go-Live
 - 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



NEW YORK
STATE OF
OPPORTUNITY.

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SFS Integration & Purchasing Impacts



SFS User Access to Catalogs

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



A screenshot of the Oracle Requisition system interface in Internet Explorer. The browser address bar shows the URL: https://uat.sfs.ny.gov/psp/fscm/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_PROCURE_REQ_GBL?PORTALPARAM_PTCNAV=EP_PV_PR. The page title is "Requisition - Windows Internet Explorer". The Oracle logo is visible at the top left. The main navigation bar includes "Home", "Worklist", "Add to Favorites", and "Sign out". Below the navigation bar, there is a "Create Requisition" link and a "Welcome" message. The "Request Options" dropdown menu is open, showing a search bar and a list of options: "Catalog", "Special Requests", "Templates", "Web", "Forms", "ePro Services", "Express Item Entry", "Favorites", and "Recently Ordered". The "Web" option is circled in red. The "Web" option includes the text "Browse Supplier Websites" and "Perfect Commerce". The "Recently Ordered" section lists several items, including "MRAPS (Mobile Rifle Armor Pr..." and "Sanding Sheet Length 11 In...". The status bar at the bottom indicates "Internet | Protected Mode: On" and "125%".

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.

Requisition - Windows Internet Explorer

https://uat.sfs.ny.gov/psp/fscm/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_PROCIURE_REQ.GBL?Page=PV_REQ_CHECKOUT&Action=

Oracle

Checkout - Review and Submit

Review the item information and submit the req for approval.

My Preferences Requisition Settings

Requisition Summary

Business Unit

*Requester

*Currency USD

Card Number

Expiration Date

Use Procurement Card

Requisition Name

Priority Medium

PSP Method

Preview PSP Allocation

Agency Contract Details

Requisition Type

Autobuild RFQ Contract Process

Cart Summary: Total Amount 150.00 USD

Expand lines to review shipping and accounting details

Add More Items

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details
1	MRAPS (Mobile Rifle Armor Prot)	BLKT-001	INTERNATIONAL PAPER COMPANY	1,000	Each	150.0000	150.00	

Internet | Protected Mode: On



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

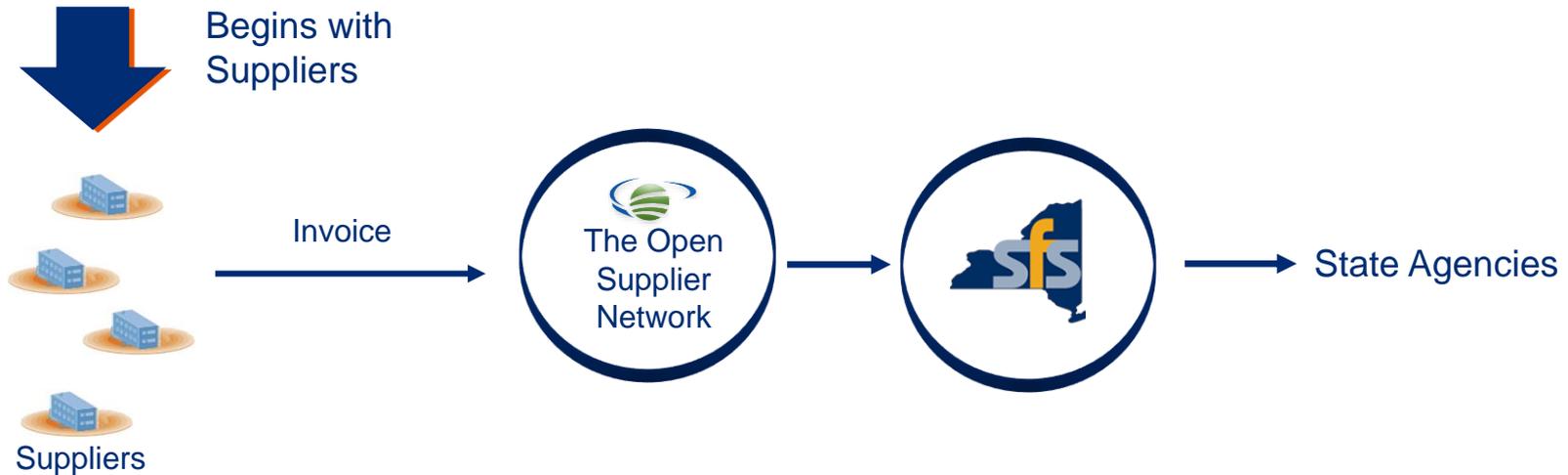


Goals of eInvoicing

- 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 (OSN)
- 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!**



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eInvoicing Rollout Strategy

- 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
 - 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
- No attachments** (items 1-7)
- With attachments** (items 8-10)



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

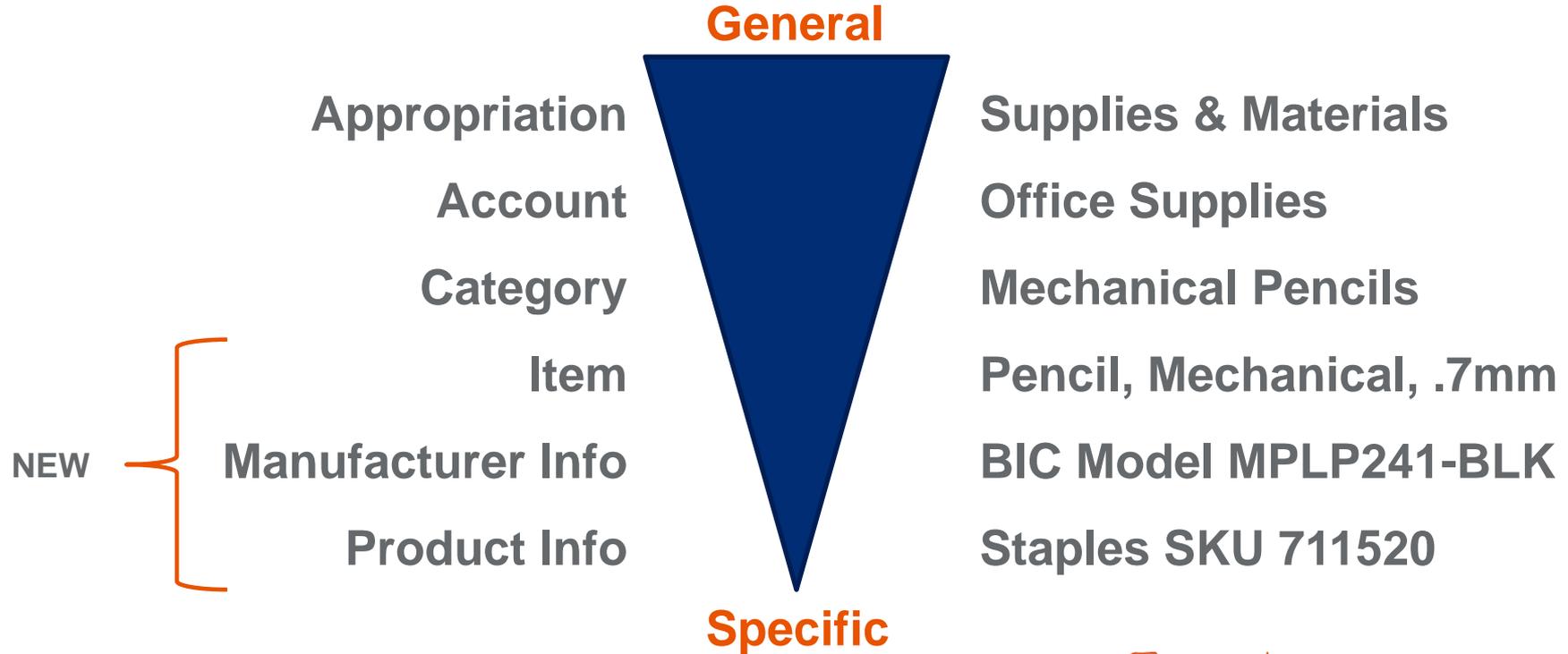


Goals of Item Master

- 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 make smart decisions about procurement moving forward
- Inventory Controls
 - Enable and expand use of SFS inventory module



Levels of Classification



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 requisition is populated, this data will be filled in.

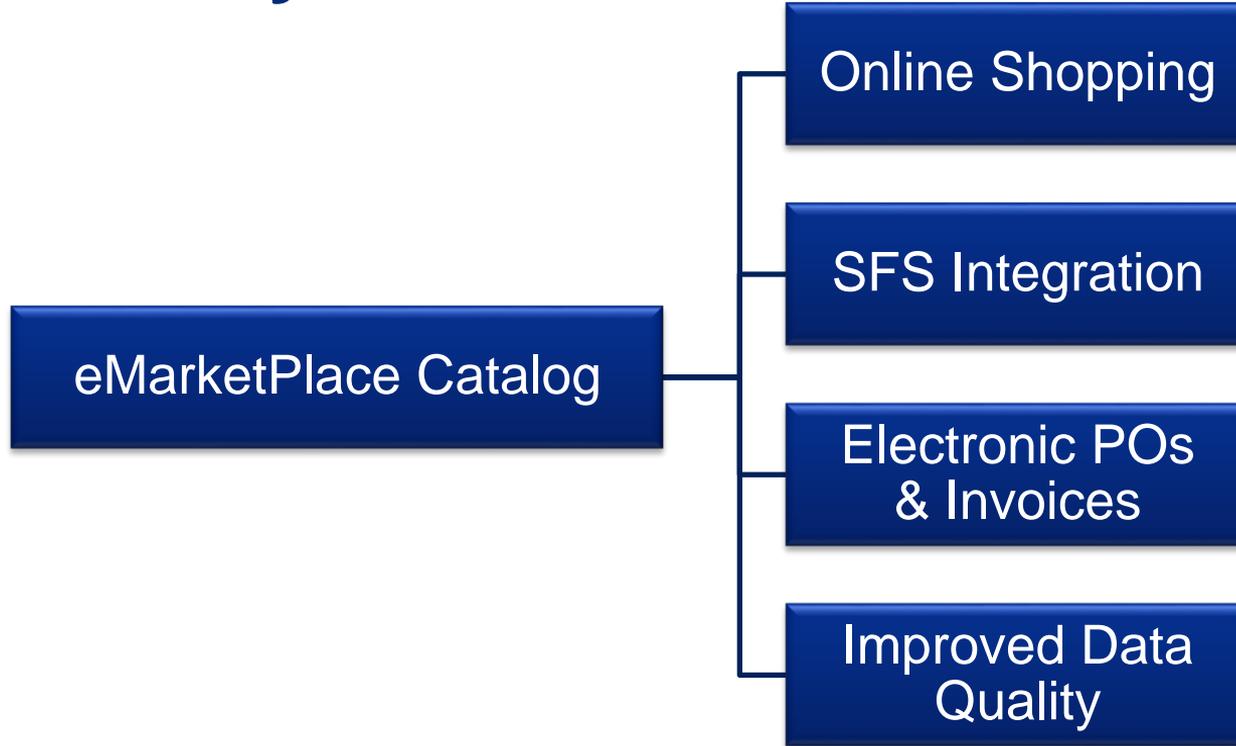


Phases of Item Master Implementation

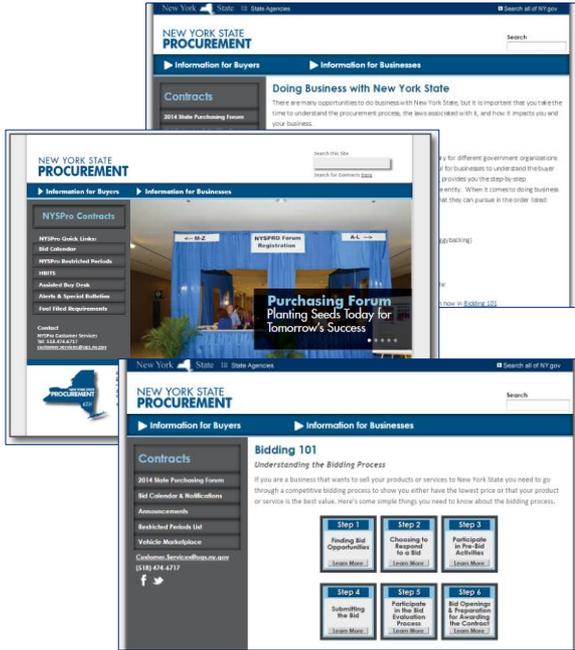
- Complete/Maintenance Stage
 - DHSES OEM Emergency Stockpile
- In Progress
 - DHSES traditional inventory
 - eMarketPlace Catalog products
- Future
 - Other Agency traditional inventory
 - Products for use in SFS eProcurement (non-eMarketPlace)
 - Agency-requested items for spend intelligence



Summary



Website & Contact Information



Contact us today

(518) 474-6717

customer.services@ogs.ny.gov



Find procurement resources:

www.nyspro.ogs.ny.gov



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Questions?



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