

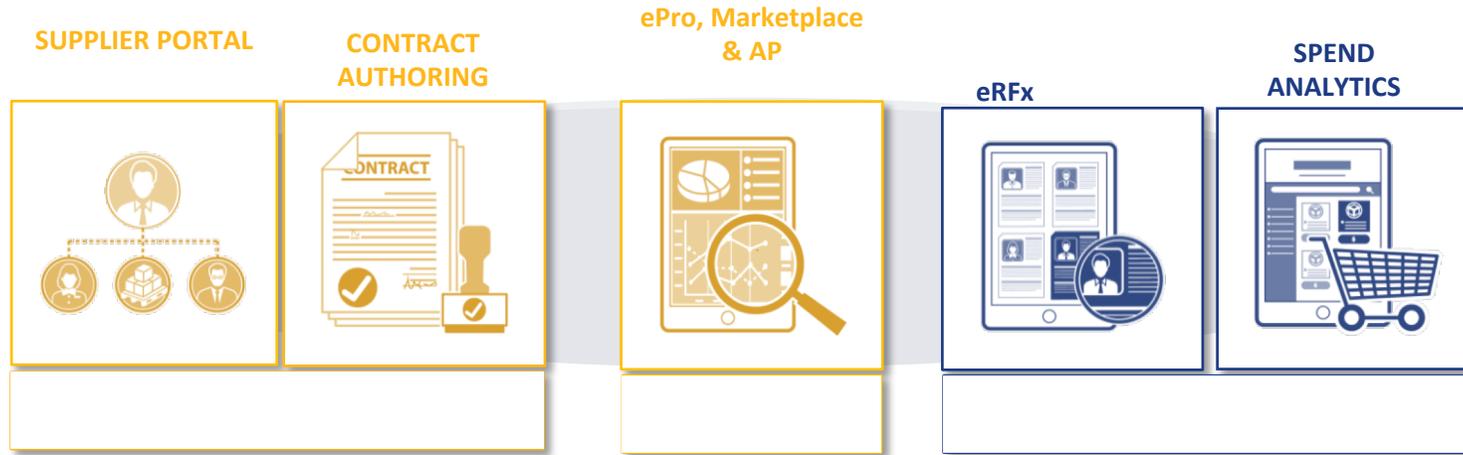


CUNY Procurement Office

CUNYBuy Progress Report – March 2022

CUNYBuy

Single platform simplifies, streamlines, and removes guesswork



 **CUNYBuy Solution** 

** Single Platform * User Friendly * End-to-End Solution **

CUNYBuy Achievements - Phase 1

Supplier Portal

- Design & Configuration complete – Ready for Production Migration
 - Includes: New &, Maint. Requests, City/State/NTL
- Focus Group Complete
- SIT and UAT Testing complete
- Training Curriculum Defined
- FAQs drafted

Contract Authoring

- Design & Configuration complete – Ready for Production Migration
- Focus Groups Complete
- SIT & UAT Testing complete
- Training Curriculum Defined
- Conversion Criteria Defined
- FAQs Drafted

Integrations

- SSO Integration Complete & Ready for Production Migration
- User Sync Integration Complete & Ready for Production Migration
- Custom Field (Chartfield Values) Complete & Ready for Production Migration

Opportunities Identified to date

CUNYBuy design sessions uncovered several opportunities for business process efficiency

✓ Document Transaction Search

- Transparency and ease of access to transaction activity (e.g. Purchase Order copies, Supplier Invoices, etc.)

✓ Workflow Approval Status

- Transparency into transaction status and position in approval process

✓ Supplier New Requests and Maintenance Request

- Enhanced visibility and traceability into Supplier Status

✓ Non-PO Voucher Entry & Department Assignment

- Automation of outstanding Non-PO invoice activity

✓ Payment/Check Request Form

- AP Automation, procurement bypass, and automated policy enforcement (auto-return criteria)

✓ Optimized Asset Review process & Consolidated Category Structure

- Simplified user experience and enhanced administrative tracking of potential assets

Expanded Marketplace

- Enhanced user experience, optimized contract compliance,

✓ Automated Contract Manager Role Workgroup/BU assignment

- Eliminates manual contract manager onboarding maintenance

✓ Buyer Requisition Workflow assignment in CUNYBuy

- Eliminates offline spreadsheet activity

✓ Automated merge of Requisition & Contract data

- Eliminates the dual chartfield entry requirement for Buyers

✓ Increased PO email dispatch opportunities

- Automated PO emails distribution

✓ Software Acquisition & Renewal transactions

- Standardized CIS security online form

Life Cycle Enhancement Opportunities



1. Supplier Workflow

- *Enhanced Process:* Government Watchlist automated check (OFAC), Transparent Request & Registration Progress

2. Contract Workflow

- *Enhanced Process:* Version Control, Status tracking, effort/workload identification

3. Requisition Workflow

- *Role Consolidation:* Creator/Requestor/Supervisor (*reduction manual touchpoints*)
- *Expedited Workflow:* Low dollar approvals, Procurement marketplace bypass
- *Enhanced Process:* Budget Check/Pre-encumbrance at beginning, AP Non-PO entry, Asset Review

4. Purchase Order Workflow

- *Enhanced Process:* Increase utilization of PO email dispatch

5. Receipt Workflow:

- *Enhanced Process:* Property Manager approval for 4-way inspection

6. Voucher Workflow

- *Enhanced Process:* Auto-Escalation and Notifications of match exceptions, elimination of duplicative review, voucher to PO entry, Supplier Portal Invoice submission (Portal PO Flip)

Future State

Role Management & Approvals

1. Creator to Requestor assignment maintenance

- **Future State:**
 - Eliminate Maintenance of Creator to Requestor Assignments
 - Consolidation of Requestor Population to automated “Base Role” or Creator role
 - Refine Creator & Requestor visibility to be based on transaction data (e.g. BU or user department)

2. Creator/Requestor to Supervisory maintenance

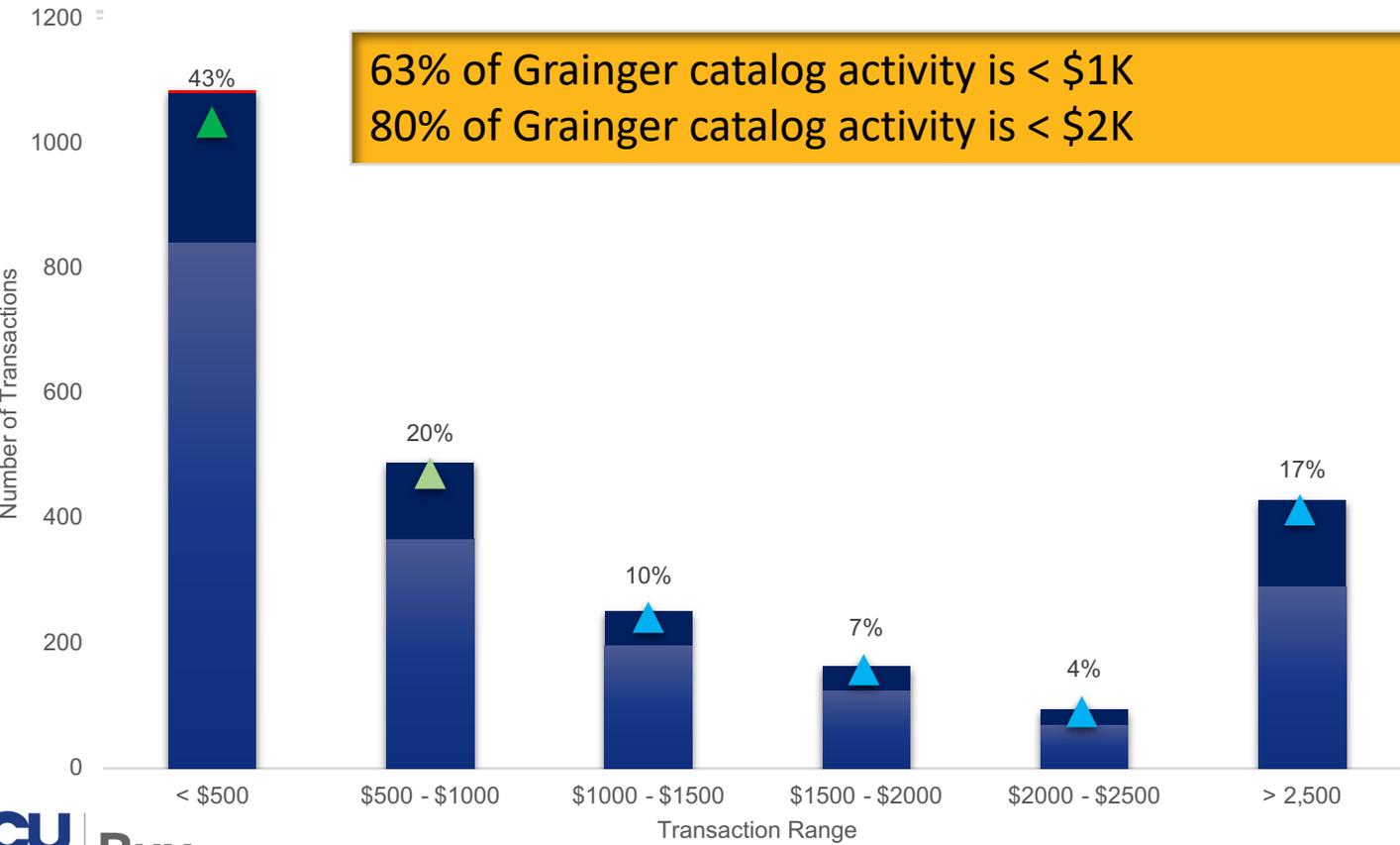
- **Future State:** Omit Supervisory Approval in favor of Department Level 1, optional Ad Hoc approval to support college specific business processes

3. Dollar Threshold for Low Dollar Purchases

- **Future State:**
 - Introduce and *define* dollar threshold for Department 1 and Department 2 to ensure low dollar transactions do not route unnecessarily for senior leadership approval.
 - Validate appropriateness of department Level 1 & 2 approval participants and provide recommended standards that support multiple approval queue participants/backups.
 - Eliminate budget reviewers that reside in Department level 2 in favor of an automated budget check that occurs at the beginning of workflow.

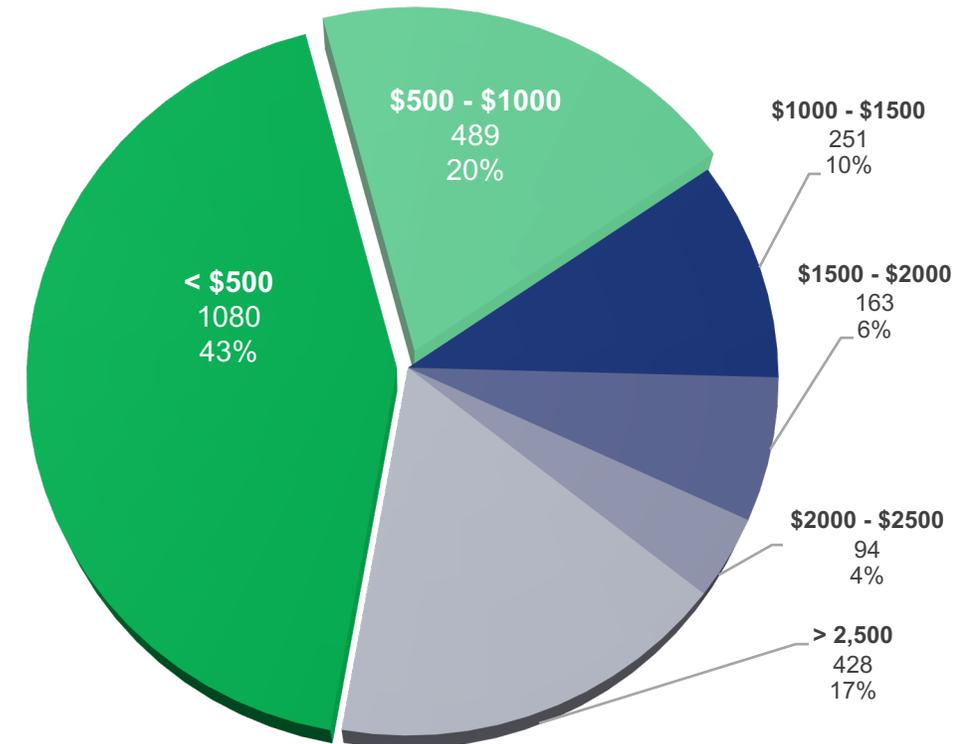
WW Grainger Marketplace Statistics

WW Grainger Transactions by Year (2021-2022)



63% of Grainger catalog activity is < \$1K
80% of Grainger catalog activity is < \$2K

WW Grainger Transactions 2 Year Totals: 2021-2022



Current Activities

Phase 1 (*Go-Live: April 4th, 2022*)

- Testing completion and sign-off
- Cutover planning and production migration
- Training materials and curriculum development
- Production communication readiness preparations

Phase 2 (*Go-Live: Summer 2022*)

- Configuration closeout sessions ePro & AP modules
- Phase 2 integration design & unit testing
- Marketplace enablement
- Focus Group preparations

Next Steps

- March 2022
 - Production Migration of Configuration and Integration of Supplier and Contract Authoring
 - Go-Live Preparations and User Training
- April 2022
 - Go-Live & Production Support of Phase 1 Modules
 - Close-out of ePro & AP Configuration Sessions
 - Phase 2 Focus Groups
 - Begin Phase 3 Design & Configuration
- May 2022
 - Phase 2 Testing Preparation