



# **i-Buy NYU**

# **Introductory Guide**

Revised November 16th, 2016

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# What is Project Lighthouse/i-Buy NYU?

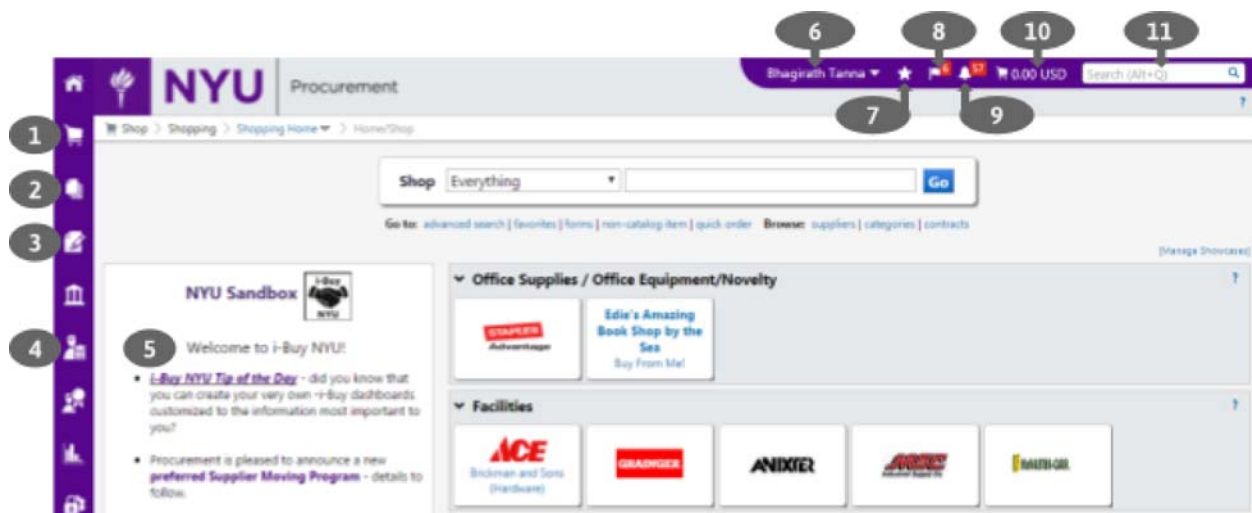
Project Lighthouse was a University-wide initiative to improve the overall process of buying goods/services and paying suppliers. It involved the implementation of a new system, **i-Buy NYU**, which replaced eReq and two payment request forms: Business Payment Form (BUS5000) and Payment to Individuals Form (IND4000). i-Buy NYU impacts anyone who buys goods or services at the University – this includes, but is not limited to, catering orders, computers and office supplies.

**\*Please Note:** *Employee reimbursements will continue to be processed via AP Workflow, Student reimbursements will continue to be processed via the Student Expense Reimbursement Form (EXP2000S).*

## i-Buy NYU Guiding Principles

- Enhance the NYU community's quality of service through improved **transparency** into ordering and payment processes
- Ensure a **user friendly experience** with an ease of use platform supported by self-service capabilities
- Adopt a **simple and consistent** solution, using best-in-class processes and technology
- **Eliminate existing paper forms** to increase efficiency, consistency and timeliness of transaction processing
- Implement simplified, yet effective, controls

## i-Buy NYU Site Overview



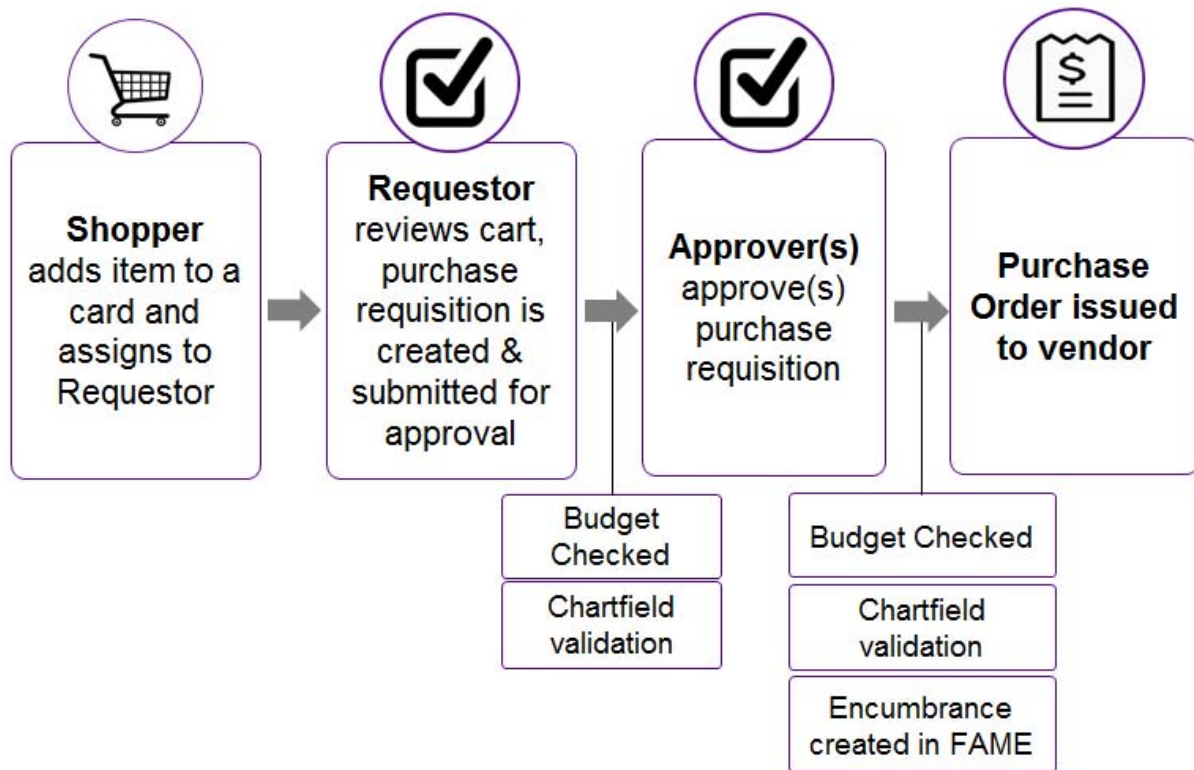
Accessible via the Work tab on NYUHome, the homepage of i-Buy NYU provides the following features:

1. Browse, shop and manage your cart(s)
2. Search for a Purchase Requisition (PR), Purchase Order (PO), Voucher or other Procurement/AP related document
3. Search NYU Contracts for goods and services
4. Manage, request and search for suppliers

5. Access tip sheets, videos and additional training resources
6. View your profile, dashboards and customize your i-Buy NYU experience
7. Access bookmarks (frequently visited catalogs or pages)
8. View action items requiring your approval or resubmission
9. View all i-Buy NYU system notifications requiring your review
10. Quickly access your active shopping cart
11. Quickly search for a PO, Voucher, Receipt or other document

# PO Issuance Process

The process flow below highlights the steps, system validation and roles required prior to a PO being created in i-Buy NYU and issued to the supplier. More information about the roles mentioned below are available in the next section (page 6).



# Roles in i-Buy NYU

Transactions in i-Buy NYU are centered around four key roles, which existed informally in eReq:

## The Shopper



Selects Items  
and adds  
them to a  
shopping cart



Assigns a cart to  
a **Requestor**  
within their  
school/dept for  
review



Can acknowledge  
receipt of  
goods/services

**Note:** All University employees will have the role of **Shopper**.  
**Shopper** cannot submit an order.

## The Requestor



Reviews shopping  
carts assigned to  
them by a  
**Shopper** in their  
school/dept\*



Submits carts for  
approval



Acknowledges  
receipt of  
goods/services

\***Requestor** will receive an email when a shopping cart has been  
assigned to them

## Roles in i-Buy NYU (continued)

### The Advanced Requestor



\*Advanced Requestor will receive an email when a shopping cart has been assigned to them.

### The Approver



\*Approver will receive an email notification when a requisition requires their approval.

\*\*Approvers have ability to edit requisition details, including chartfields.

# Buying and Paying Guide

The i-Buy NYU Buying and Paying Guide provides a detailed crosswalk of how various payment types will be handled once i-Buy NYU goes live; a sample of some of these changes can be found below. [Click here to view the detailed Buying and Paying Guide.](#)

I used to...	Order <b>books and periodicals</b> through eReq	With i-Buy NYU, I will...	Use a <b>purchasing card</b>
	Pay a <b>subawardee</b> through Flextecs		Use the <b>i-Buy NYU Subaward Form</b>
	Order <b>catering</b> through eReq		Use the <b>i-Buy NYU Catering Form</b>
	Pay <b>royalties or licenses</b> using a Business Payment Form		Use the <b>i-Buy NYU Royalties/Licenses Payment Request Form</b>
	Pay for a <b>speaker</b> using a Business Payment Form		Use the <b>i-Buy NYU Honoraria/Limited Engagement Payment Request Form</b>
	Pay <b>actors or other entertainers</b> using a Business Payment Form		Use the <b>i-Buy NYU Honoraria/Limited Engagement Payment Request Form</b>
	Order <b>venues/events</b> through eReq		Use the <b>i-Buy NYU Venues/Events Form</b>
	<b>Reimburse travel or expenses</b> for a guest using a Payment to Individuals Form		Use the <b>i-Buy NYU Guest Travel/Reimbursable Expenses Payment Form</b>



# Legacy Purchase Order Conversion

PO Prefix	PO Type	Transition to i-Buy NYU	Criteria to Close PO
P	Regular Non Cat	Yes - if it does not meet the "Close PO" criteria	No activity for 3 months and \$1,000 PO remaining balance
S	Service Order	Yes - if it does not meet the "Close PO" criteria	No activity for 3 months and \$1,000 PO remaining balance
B	Blanket	Yes - if it does not meet the "Close PO" criteria	No activity for 3 months and \$1,000 PO remaining balance
U	Subaward	Yes - All	No PO's to be closed - all transitioned to i-Buy NYU.
C	CPACS	Yes - All	No PO's to be closed - all transitioned to i-Buy NYU.
K	Contract (Recurring)	Yes - Need to analyze PO data for specifics.	An analysis will be conducted to ascertain recurring payments and their treatment.
E	Current I Buy	No	No activity for 3 months and \$1,000 PO remaining balance
L	Low Dollar	Yes - if it does not meet the "Close PO" criteria	No activity for 3 months and \$1,000 PO remaining balance

## Conversion and Cutoff Dates

Date	Notes
<b>June 3 onwards</b>	<b>LAST DAY</b> for entering FULLY APPROVED requisitions into eReq (Procurement team will expedite all reqs entered up to, and on this date). <b>LAST DAY</b> for POs to be loaded in Flexecs for subawards.
<b>June 4 onwards</b>	<b>LAST DAY</b> to load subaward invoices in Flexecs. <u>Any invoices received after June 4 will be processed in i-Buy NYU.</u>
<b>June 6 onwards</b>	eReq will be made available for VIEW ONLY purposes indefinitely.
<b>June 10</b>	<b>LAST DAY</b> for Principal Investigators to approve subaward invoices in Flexecs. <u>Any unapproved invoices as of June 10 will be canceled by Flexecs and reprocessed in i-Buy NYU.</u> <b>Starting at 11:59pm, Flexecs will no longer be accessible.</b>
<b>June 14</b>	<b>LAST DAY</b> for processing invoices through Accounts Payable.
<b>June 27</b>	<b>i-Buy NYU is live!</b>
<b>June 30</b>	Invoice images and approval data from Flexecs can be requested by contacting the FinanceLink Service Center (askfinancelink@nyu.edu or x81111).
<b>July 1</b>	Recurring payments will be executed with the legacy method (i-Buy NYU recurring payments will be executed beginning August 1, 2016).

## Types of Orders

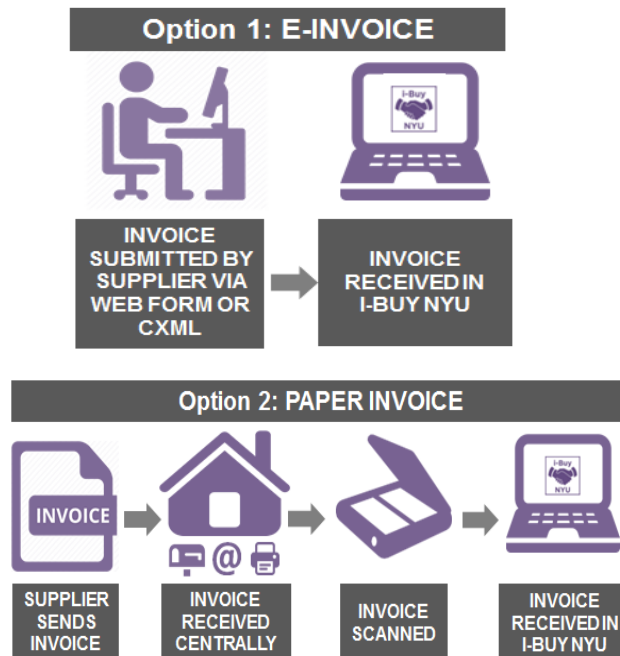
Previous Order Type	New Order Type	Description
<b>Blanket Orders</b> <b>(PO# prefix B)</b>	<b>Standing Order Form</b> <b>(PO# prefix SiB)</b>	Repetitive, specified services or items, or categories of items, from the same supplier over period of up to one year, or on a monthly basis. The University is obtaining more favorable pricing through volume commitments. Contract is in place with the supplier along with negotiated pricing.
<b>i-Buy Order</b> <b>PO# Prefix E</b>	<b>Catalog/Punch ut Order</b> <b>(PO# prefix iB)</b>	Staples, CDW, or any supplier that has been set up on the Marketplace with contracted pricing and goods/services.
<b>Regular Non Catalog or Service Order</b> <b>PO# Prefix S or P</b>	<b>Services/Non Catalog Order</b> <b>(PO # prefix iB)</b>	One time goods or service orders allowing for free form descriptions.

## Requisition Approvals

- Approval workflows for Purchase Requisitions (excluding Funds 24/25), will be driven by the existing Delegation of Authority matrix for each school/division and reflective of current signature authority policy thresholds:
  - Level 5: Up to \$5,000
  - Level 4: \$5,001 to \$25,000
  - Level 3: \$25,001 to \$100,000
  - Level 2 & 1: \$100,001 and Above
- Approval workflows for Funds 24/25 requisitions will be driven by the existing Departmental Administrator (DA) and Principal Investigator (PI) data within FAME, with the following rules:
  - For Grant POs (excluding subawards) up to \$5,000, approval will be required by Dept. Admin
  - For Grant POs (excluding subawards) exceeding \$5,000, approval will be required by both Dept. Admin and PI
  - For all Subaward requisitions and invoices, approval will be required by both Dept. Admin and PI, irrespective of dollar amount.

# Types of Invoices

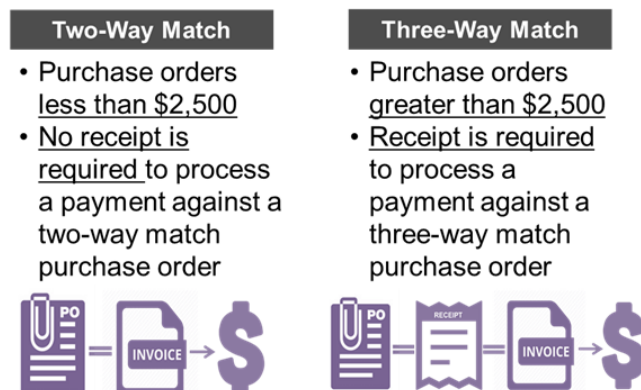
- Invoices can be submitted in the following ways:



- Effective June 27, 2016, invoices must be sent to the following email address for processing:
  - **Email:** nyuinvoices@nyu.edu

## Receiving Goods & Services

- For purchases exceeding \$2500, i-Buy NYU will require an acknowledgement that the goods/services are “received.”
- When an invoice is submitted, the system will automatically notify the Requestor to confirm receipt of the goods/services within i-Buy NYU.



## Match Exceptions

- A Match Exception is a warning indicator that occurs during the Matching Process (Two-Way or Three-Way as described above) which identifies a discrepancy between the PO and Invoice and/or Receipt, thus preventing payment to the supplier (until resolved).
- Accounts Payable will investigate all match exceptions, propose a resolution and forward to the Match Exception Approver (Level 5 Approver within Delegation of Authority Database).
- The Match Exception Approver will review the proposed resolution and approve / reject it. Approved match exceptions will result in the invoice being submitted for payment. Rejected Match exceptions will not be paid and it is expected that the Match Exception Approver and/or their designee will contact the supplier to resolve.

## Match Exception Rules

- Match exception tolerances are 10% of the PO total or \$100, whichever is less (total does not include shipping)
- Match exception approvers can approve up to \$1,000 over PO value.
- Any Match exception over \$1,000 requires a Change Order.
- There is a limit of 1 Match Exception per PO, subsequent match exceptions will require a Change Order.
- No match exceptions exist for Funds 24/25 POs as Department Administrators review and approve all requests.

## Change Orders vs. New Orders

Scenarios where a **Change Order** should be submitted:

IF...	AND...	THEN...
Amount (PO Quantity or Price) Increases or Decreases	Order is <b>Non-Catalog</b> , Change is <b>simple</b> and Invoice activity is <b>minimal to none</b> .	Submit change order and indicate lines that will increase/decrease in price/quantity, amount and new PO total.
Chartfield changes resulting in new funding source		Submit change order and indicate lines that will change and from/to chartfield.
PO is cancelled (Note: Order must not have been invoiced against)		Submit change order and indicate "Cancel PO" as type of change.
PO line(s) are canceled or specific line is zeroed out		Submit change order and indicate lines that will decrease to zero and new PO total.
PO is closed (Note: PO must be fully encumbered to request cancellation and encumbrance release)		Submit change order and indicate "Close PO" as type of change.
General PO information is amended (Address, Ship-to address, etc)		Submit change order and indicate specific PO change.

Scenarios where a **New Order** should be submitted:

IF...	THEN...
Change is related to Catalog or Punchout Order	Submit a new order
Complex change to multiple lines/chartfields that haven't been invoiced	Copy existing order, edit cart to reflect changes and submit new order. Cancel old order.
Chartfield changes on a partially paid PO	Change chartfield on PO for remaining balance. Submit JEMS entry for paid portion of PO.
Chartfield changes on a fully paid PO	Changes must be done via JEMS entry.

# Impact on Grant-Related Processes (Funds 24/25)

## Approvals

- **Approval workflows** for Funds 24/25 requisitions will be driven by the existing Departmental Administrator (DA) and Principal Investigator (PI) data within FAME, with the following rules:
  - **For Grant POs** (excluding subawards) **up to \$5,000**, approval will be required by Dept. Admin
  - **For Grant POs** (excluding subawards) **exceeding \$5,000**, approval will be required by both Dept. Admin and PI
  - **For all Subaward requisitions and invoices**, approval will be required by both Dept. Admin and PI, irrespective of dollar amount.

## Flextecs/Subawards

- As part of the i-Buy NYU release, **Flextecs will be decommissioned** and all subaward invoice payments will be initiated via the Subaward Form in i-Buy NYU, which will be easily accessible from the i-Buy NYU homepage.

## Match Exceptions

- **No match exceptions exist** for Funds 24/25 POs as Department Administrators review and approve all requests.

# Account Mapping

In an effort to standardize how we categorize purchases across all schools and divisions, NYU will be linking the commodity code of an item to the existing FAME account structure. Click [here](#) to access the full commodity-code to account mapping document.

Example: Purchase of 25 mouth mirrors at College of Dentistry

Item	Commodity Code	Commodity Code Description	FAME Default Account Code	FAME Default Account Code Description
Mouth Mirrors	42150000	Dental Supplies > Dental Supplies	65294	Dental Instruments

# APPENDIX

## Appendix A: Key Terms

Term	Definition
Catalog Order	Contracted items hosted within i-Buy NYU. Easy platform without the need to visit the supplier's website.
Centralized Invoice Receiving	Centralized location that receives invoices via fax, email, or traditional mail, from suppliers and processed in i-Buy NYU.
Commodity Code	Standardized code to classify the procurement of goods and services.
e-Invoice	Electronically transmitted invoices delivered directly to i-Buy NYU by suppliers.
Event Form (embedded in i-Buy NYU)	Automated form used for the buying of Events and Venues.
i-Buy NYU Voucher	System-generated identification number for a supplier invoice.
Non-Catalog Order	Traditional Requisition request requiring quantities, unit prices, product descriptions, and commodity assignment (replaces eReq).
Payment Request Form (embedded in i-Buy NYU)	Automated form used for the following types of activity: Memberships, Non-NYU Awards/Prizes, Honoraria/Limited Engagements, Entertainers, Royalties/Licensing, Guest Travel Reimbursements.
Punchout Order	Contracted items hosted on the Supplier's website
Purchase Order	A legally binding contract sent to a supplier authorizing shipment of a product to the customer at a specified price and terms.
Receipt	Acknowledgement of goods received/services rendered.
Shopping Cart	The area of i-Buy NYU where the Shopper places goods or services in advance of submitting to the Requestor.
Standing Orders	Repetitive, specified services or items, or categories of items, from the same supplier over a period of up to one year, or on a monthly basis. The University is obtaining more favorable pricing through volume commitments. Contract is in place with the supplier along with negotiated pricing.
Supplier Invoice	The itemized bill for goods sold or services provided containing individual prices, the total charge and the terms.
Total Supplier Management	A central repository for supplier onboarding, maintenance and routing of invoices.
Two-Way Matching vs. Three-Way Matching	<p>Purchase orders that exceed \$2,500 require a <u>3-way match</u>. Defined as requiring a matching 'Receiver' and 'Invoice' that falls within the tolerances of the purchase order.</p> <p>*Purchase orders less than \$2,500 require a <u>2-way match</u>. Defined as requiring an 'Invoice' that falls within the tolerances of the purchase order. No receiver is required.</p>



