Procurement Services Update

Quarterly Research Administrator’s Meeting
January 28, 2016

Kelly Loll, Director of Purchasing Services
Crystal Herrera, Procurement Manager, Purchasing Services
Agenda

- Vision and Goals of Purchasing Services
- Research Lab Supply Store
- Hazardous Chemical Barcoding
- Fisher Scientific - FIU’s Prime Supplier
- Processing Requisitions for Sub-Awards
- Spend Analytics Tool
- Supplier Onboarding Portal
- myFIUmarket Demo
Vision of Purchasing Services

Our vision is to be strategic procurement experts who deliver best in class, total cost reduction solutions while providing outstanding customer service and process efficiency.
Transformation Initiatives

Sustainable Purchasing Capacity Improvements

- Process
  - Strategic Sourcing
  - Contract Templates
  - Back Office PeopleSoft Manual
  - Rewrite Procurement Manual
  - Hazardous Chemicals/Lab Store
  - Services paid with Unencumbered Funds

- Performance
  - Dashboard
  - PO Cycle Time*
  - Reduce Confirming POs
  - Contract Administration
  - Vendor Performance
  - Equipment Maintenance

- Organization
  - Redesign
  - New Purchasing Coordinator
  - New Senior Purchasing Agent
  - Cross Training
  - New Business Analyst

- Training
  - PeopleSoft
  - Purchasing 101
  - Contracts 101
  - Certification
  - New employee on-boarding prior to PS access

- Technology
  - PeopleSoft 9.2 Upgrade
  - eProcurement, eSolicitations and eContracts
  - Vendor Portal
  - Queries
  - SharePoint site for contracts

Items in blue are initiatives completed
Items in red are initiatives already started, i.e. PO cycle time YTD reduced from 10 to 4.25 days.
Items in black need to be completed
What does Purchasing Services want to accomplish?

Our goals are to provide:

- Training
- PeopleSoft & SciQuest
- Procurement
- Contracts
- Quality service
- Quality contracts that provide savings
- Competitive pricing
- Technology that increase efficiencies

Purchasing Services will focus on aggregating our spend by increasing the number of competitive solicitations and achieving our goals.
Research Lab Supply Store

- Fisher Full Time FTE
  - 40 hours a week
  - Supports all campuses
    - 5 days a week at MMC
    - 2-3 days at BBC and EC to provide chemical management

- Stockroom Management
  - Stockroom at ACH4
  - 100 stocked items
  - Web based ordering
  - Consigned Inventory
  - Point of Use Inventory Management

- Chemical Management
  - Tracking of chemicals at the container level
  - Inputting data into EHS Assist
  - Chemicals shipped to central location for inventory management
  - Removal from inventory of empty containers
Summary of Benefits to FIU

- Allow the University customer to spend more time focused on their research and less time procuring products, waiting on the products they ordered or doing administrative duties required by FIU EH&S Department.

- Allow the University customer immediate access to the top 100 most commonly used items which Scientific Receiving can deliver to the lab or procured by walking up to the storeroom at ACH4, Scientific Receiving.

- Allow the University to be in compliance with regulatory requirements by maintaining an accurate chemical inventory tracking system (EH&S Assist)

- Allow the University customer to continue to receive the best prices through Fisher Scientific under the University of Florida contract, including entirely free shipping (no hazmat, ice or fuel surcharges).

- Allow the University to customize solutions for each individual lab.

- Allow the services provided by Fisher to be self funded by increasing spend with Fisher.
Research Lab Supply Store

• There is three ways to order. You can order through the myFIUmarket, www.fishersci.com, or you can order via www.fishersci.com while at the store.

• All three ways will bring you to the Fisher website. When you are logged in, if you are navigating to the Fisher website directly, and not through the myFIUmarket, you need to be logged in using the 270345-003 account to view and order items at the store.

• Unless otherwise requested, all items will be delivered to the lab by Scientific Receiving, typically the same day.

• If you need to pick up the items from the store, instead of waiting for delivery you must capture the order confirmation number and email confirmation number to Store Associate at frankee.inoa@thermofisher.com
Hazardous Chemical Barcoding - Lab Personnel Responsibilities

- When placing orders for Hazardous chemicals it is the lab’s **responsibility** to make sure they are shipped to the assigned barcoding areas, to include:

<table>
<thead>
<tr>
<th>Department</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>MMC</td>
<td>CP 193 Receiving Dock</td>
</tr>
<tr>
<td>EC Bio Medical</td>
<td>EC2600</td>
</tr>
<tr>
<td>EC Civil &amp; Environmental Engineering</td>
<td>EC3678</td>
</tr>
<tr>
<td>EC Applied Research Center</td>
<td>EC2180</td>
</tr>
<tr>
<td>BBC</td>
<td>Central Receiving Dock</td>
</tr>
</tbody>
</table>

- It is the responsibility of the lab personnel placing any hazardous chemical order to specifically request the PI Name, Bldg. and Room number to the Ship To ATTN line.
Hazardous Chemical Barcoding-Lab Personnel Responsibilities Cont.

• In rare instances when hazardous chemicals are delivered directly to lab by vendor (by-passing Receiving), the Store Associate must be contacted to make arrangements for product barcoding.

• When hazardous chemical container contents are consumed, it is the responsibility of the lab personnel to take it out of inventory in the EH&S Assist program or remove the barcode and apply to the Zero Quantity Sheet in each lab (usually by hazardous waste area). Zero Quantity Sheets will be collected by FIU EH&S for updating the EH&S Assist program.

• When expedited orders are placed (premium freight or refrigerated), contact Receiving so they can expect the shipment and deliver immediately.

• When the lab receives an expedited hazardous chemical without barcodes attached to containers, a clear packing slip envelope with instructions will be included with the shipment. The barcodes must be attached to the container by lab personnel.
Fisher Scientific-FIU’s Prime Scientific/Safety Supplier

- Fisher Scientific is honored to have been named the primary supplier for all of FIU’s laboratory supplies, chemicals, equipment and safety products. FIU utilizes the University of Florida contract which gives you exceptional discounts for Academic/Medical Research and completely free shipping, unless you request rush delivery.

- Fisher has hired a full time on campus employee to manage the Research Lab Supply Store and barcode and enter in EH&S Assist all hazardous chemicals on all 3 FIU campuses.

- Fisher is providing this employee to FIU at no charge, provided FIU increases their total spend with Fisher. Year 1 goal is an increase of $500,000.

- As a best practice, going forward, “check Fisher first”. This is intended to help to drive spend to Fisher.
To help FIU achieve the Year 1 goal, do you currently purchase directly from any of these companies:

- VWR
- Sigma
- Promega
- USA Scientific
- World Wide Medical
- Genesee
- Qiagen
- BioRad

If you do, Fisher will be able to provide exact matches or alternatives for almost all items sold by the above vendors. The FIU purchasing department has arranged a customized process to make changing vendors as easy as possible. Please allow Fisher the opportunity to source items for your lab and switch where it makes sense. Please contact Jillian Vicale at 954-559-2257 or jillian.vicale@thermofisher.com
Processing Requisitions for Sub-Awards

- Funds need to be loaded correctly
  - First $25,000 loaded to account 772951 (category code 95701)
  - Remaining balance loaded to account 772952 (category code 95702) on a separate line item

- Requisitions setup
  - “amount only” and “services”
  - Include a description of the services and CFDA number
  - Attach subcontract and any amendments to the Header Comments

- Change Orders
  - Needed when amendment is issued
  - Funds should be maintained under original PO, except when*
    - PO is issued prior to January 2015 (PS 9.2 has a new workflow that causes errors on COs)
    - Using funds allocated under the new Uniform Guidance
*Working on a new process
Spend Analytics Tool

• **Goal:**
  - Implementation of Rosslyn Analytics' RAPID Spend Analysis Software-as-a-Service Solution
  - Business transformation in support of Shared Initiatives across the SUS

• **Objectives:**
  - User friendly reports of PCard and PeopleSoft data
  - Data from six datasets to help you do your job
    - Product data
    - Finance date
    - Supply Chain Data
    - Customer Date
    - Employee Data
    - Spend Data
  - Provides connected insight to help you make strategic decisions

• **Timeline:**
  - April 2016
Integration, Cleansing and Enrichment - The RAPID Data Refinery
Spend by .... Your choice

Data Reloaded at 2013-11-22 15:17
Supplier Onboarding Portal

• **Goals:**
  • Implementation of an online, user friendly supplier application in PeopleSoft

• **Objectives:**
  • Ability for all suppliers to easily register online and attach relevant forms
  • Provide a confirmation email upon successful submission
  • Reduce the number of calls from suppliers
  • Reduces data entry for Purchasing Services
  • Reduce cycle time to activate suppliers
  • Maintain a list of suppliers with NIGP Codes
  • Provide notice to suppliers of competitive solicitations based on NIGP Codes
  • Increase competition and potentially better pricing

• **Timeline:**
  • Completed in 2015
What is eProcurement?

- A fully capable electronic web application for the business to government purchase of goods and services. eProcurement allows shoppers to browse online catalogs, add items to a shopping cart and submit the requisition electronically.

- Completed requisitions are routed for review and approval via electronic workflow. Requisitions to select suppliers included in the "eCatalogs" will automatically generate purchase orders and transmit them to the suppliers.

- All other approved eProcurement requisitions are routed to purchasing agents for review and processing into purchase orders.
Benefits of eProcurement

• Provide easy to use self-service buying approach for FIU departments
• Streamline the purchasing process for departments and Purchasing
• Develop and utilize FIU’s negotiated contract pricing, enabling online catalog ordering for the FIU community
• More visibility and accountability on what we purchase
• Achieve greater institutional cost savings by aggregating and leveraging University-wide volume for goods and services
• Shift the nature of the Purchasing department from transactional to strategic allowing the department’s focus to be on sourcing and negotiating the best contract pricing and managing those contracts for the University
PantherSoft eProcurement

*Note: You must be a requester in PantherSoft to access myFIUmarket. To request access you can send an email to: controller@fiu.edu
Getting Assistance

- Video Snippets - Intro to ePro, ePro Punch-Out Catalogs & Assign a Cart:
  http://finance.fiu.edu/controller/FinSysandSup2.html

- Procure to Pay Manual:
  http://finance.fiu.edu/controller/FinSysandSup2.html

- Training Registration - Signup for training:
  http://finance.fiu.edu/controller/TrainingRegistration.html

- PantherPost
  Send email to controller@fiu.edu

- Financials Call Center
  305-348-7200 (7-7200)
Questions