PURCHASING INTAKE PORTAL

Information Session

September 2021
Session Goals

Purchasing Intake Portal Overview

Purchasing Intake Portal Demonstration

Q&A
Goals

Understand the purpose, impact and benefits of the Purchasing Intake Portal.

Provide you with the information you need to successfully use the Purchasing Intake Portal to engage with the Procurement team for support.

Demonstrate the Purchasing Intake Portal’s ease of use.

Highlight best practices and changes to related processes and procedures.
<table>
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<tr>
<th>CHANGE RATIONALE</th>
<th>CHANGE BENEFITS</th>
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<tr>
<td>Streamline and clarify the process to request, receive and provide support for</td>
<td>Drives simplicity and clarity into the Procurement Engagement Process.</td>
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<td>purchasing-related work.</td>
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<td>Decrease process complexity</td>
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<td>❑ Create one quick, easy to use entry point for support requests</td>
<td>Improves efficiency of Procurement support; enables guidance over Procurement</td>
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<td>❑ Increase transparency for work updates/status</td>
<td>Request Lifecycle.</td>
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<td>❑ Decrease the number of requisition types and clicks for Workday create</td>
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<td>requisition tasks</td>
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<td>Operationalize Category Management, driving work to Sourcing Leaders and Buyers</td>
<td>Improved sourcing options that optimizes value to University departments.</td>
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<td>who are experts in a particular commodity type.</td>
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The Purchasing Intake Portal operationalizes the shift to the Category Management model by aligning the request to the Purchasing category subject matter expert thereby eliminating the guesswork for the purchaser.

Category Management yields a robust sourcing strategy (by category) through a University-wide analysis and optimization of internal and external factors impacting how the good or service is being sourced.

**Why is Category Management Important?**

- Category management is critical to strategic sourcing and purchasing.
- Extending beyond the simple purchasing of goods/services, it guides the University toward enhanced Supplier Relationship development, advanced negotiations, program development and increased benefits to the University.

**What are some examples of Categories here at Yale?**

Category examples include Software, Consulting, Lab/Medical Supplies, Benefits, Equipment, Computer Hardware, etc.

**What is the Stakeholders role in Category Management?**

Stakeholder’s collaboration with the Category Owner regarding needs, goals, initiatives and future projects will yield a robust strategy that proactively addresses the stakeholder needs.
Category Management Model Benefits

<table>
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<tr>
<th>Service</th>
<th>Industry Knowledge</th>
<th>Supplier Management &amp; Risk Management</th>
<th>Negotiation</th>
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<tr>
<td>• Greater efficiency in approach to Sourcing &amp; service for Stakeholders</td>
<td>• Deep understanding and SME level industry knowledge for category and market trends</td>
<td>• Collaborative, stronger, and more strategic supplier relationships improving opportunities for shared value creation</td>
<td>• Better leveraging economies of scale</td>
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<td>• Standardizing and implementing a category specific best-in-class approach to contracting</td>
<td>• Greater awareness of innovative products/service that could better serve Yale</td>
<td>• Proactive recruitment and vetting of new, innovative suppliers</td>
<td>• Better insights into University spending and forecasts</td>
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<td>• Proactive Stakeholder support through future goal/project alignment, long-term budget planning support</td>
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<td>• Identification and mitigation of potential supply chain risks</td>
<td>• Streamlining suppliers and contracts across departments</td>
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<td>• Improved supplier performance through supplier performance management</td>
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<td>• Scored performance, supplier issue resolution, and removal of underperforming suppliers</td>
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<td>WHAT WILL CHANGE</td>
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<tr>
<td>1. Departments requiring purchasing support or needing to submit work for review and processing will use the Purchasing Intake Portal to <em>initiate</em> a support request.</td>
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<td>2. The Purchasing Intake Portal link will be available from the Procurement website.</td>
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<td>3. Support requests will receive a case number; the case becomes a repository for supporting documentation and correspondence between the department and Procurement.</td>
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<td>4. Support requests for sourcing/buying a supplier or good/service, contracting, and supplier issue resolution are triaged based on the Procurement team member’s corresponding category of expertise.</td>
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<td>5. Support requests for policy questions, data analysis and Purchasing Order closures are triaged to the appropriate team member(s).</td>
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<td>6. Workday’s Create Requisition task will be disabled for submitting requests for contract review/signature and for closing Purchase Orders.</td>
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<td>7. All contracts, including Professional Services and Consulting Agreements must be sent to purchasing via the Portal for review and signature.</td>
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WHAT WILL NOT CHANGE

- The Purchasing Intake Portal is not meant to replace direct conversations or relationships with Procurement. Users may, at any time, contact a member of the Procurement team. If the user hasn’t already done so, the Procurement Specialist will direct the user to the portal to submit their request. Regular direct conversations, emails, etc. will follow once a case is created and an email connection is generated via the intake portal between the user and the appropriate Procurement team member.

- The Purchasing Intake Portal will **not** replace current AP processes in Workday.

- Workday will continue to be utilized to create requisitions and make purchases through SciQuest. Payment requests, supplier invoices, etc., processes will not change.
New Contract/Agreement Review & Signature Process

**Process**
- **Department Requests**
  - Contract/Agreement Support
    - (E.g., Negotiations, Review, Signing)

- **Procurement**
  - Provides Contracting Support

- **Create Requisition**
  - (Attach Back-up Documentation Including Signed Contracts)

**Technology**
- **Submit through the Intake Portal**
  - (Access via Procurement’s Front Page on It’s Your Yale – available 9/28)

- **Create In Workday**
  - (Create Requisition Task)

**Note:**
- Requisition Types 3 and 4 in Workday will sunset effective 9/28.
- Contracts/Agreements that require review/signature should not be attached to Requisition Types 1 or 2.
- If an unsigned contract is submitted through Workday for review/signature, the requisition will be sent back to the department with a request to submit the contract via the Intake Portal for review and signature.
New Close PO Process

Process

Department Requests Closure of a PO/Multiple POs

Procurement Closes the PO(s)

Technology

Submit through the Intake Portal
(Access via Procurement’s Front Page on It’s Your Yale – available 9/28)

Close via Workday
(POs are closed by Procurement Only)

Note:
• If multiple POs need to be closed, you may attach a spreadsheet with up to 50 POs to your request in the Intake Portal.
• Business Offices and Departments should follow their own internal approval processes before submitting close PO requests. You will not need to submit proof of approval to Procurement.
Source to Pay Process

Example: I need assistance acquiring creative services for a campaign.

**Intake Portal**
- Requestor accesses Intake Portal Link on Procurement Homepage
- Requestor fills in Intake Portal and attaches any relevant documents (campaign details, etc.) and clicks submit.
- Intake Portal generates confirmation email to Requestor’s Outlook inbox with case number.
- Within 1 business day, Intake Portal will email Requestor with Procurement Specialist name assigned to the case.
- Within 2 business days of being assigned to the case, the Procurement Specialist assigned to your case will reach out.
- Procurement Specialist will collaborate with Requestor on supplier recommendations, negotiations, contracting, approvals, and signature.
- Signed contract is provided to the Requestor by the Procurement Specialist and case is moved to closed status.

**Workday**
- Requestor takes signed contract and adds any additional documents required by University Policy (Certificate of Insurance, Sole Source, etc.) into Workday requisition #1 or #2.
- Requisition is routed through Workday for approvals.
- Upon completion of requisition approval process, the system generates the PO and sends to Supplier.

**Workday - AP/Payment**
- Yale issues payment to supplier based upon agreed to terms within contract.
- Supplier invoices Yale against created PO.
Accessing the Portal

Procurement Webpage

Select the GET STARTED button from the Procurement webpage.

It’s Your Yale

Go to Its Your Yale. Select YALE LINKS/Purchasing Intake Portal.

Direct Link

Bookmark: https://yale-yssprod.secure.force.com/po/apex/Purchasing_Intake_Landing1
Using the Portal

When to Use the Purchasing Intake Portal

• Use the portal to engage with a Purchasing Specialist to easily and efficiently request support for:
  ➤ Source a supplier or good/service; support a negotiation, quote
  ➤ Understand the intent/impact of a policy
  ➤ Request support for an issue with a supplier
  ➤ Request support for data analysis
  ➤ Submit a contract for review/signature
  ➤ Submit a request to close a Purchase Order(s)

Service Level Agreement (SLA)

• After submitting the support request:
  ➤ Your case will be assigned to a Procurement team member within one business day.
  ➤ You will be contacted by the Procurement team member within two business days
After submitting the completed Purchasing Intake Form you will receive a confirmation email. You will be notified within one business day who is assigned to your case.

Use the case number in your correspondence with your Purchasing Specialist.
The Purchasing Intake Portal will not replace current AP processes in Workday. Workday will continue to be utilized to create requisitions and make purchases through SciQuest.

Payment requests, supplier invoices, etc., processes will not change.

After implementing the Purchasing Intake Portal, Workday’s Create Requisition task will be disabled for submitting requests for contract review/signature and closing Purchase Orders since those requests will then be initiated through the Purchasing Intake Portal.

Requisition Types 3 & 4 will be disabled and labeled DNU (Do Not Use) post go-live.

If Requisition Type 3 or 4 is selected, you will receive the following message:

**Req Type 03/04 are no longer available for use. For assistance, please go to the Purchasing Intake Form web page.**

Note: The message will include a link to the form.
## Requisition Scenario as of 9/28/21

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<th>Scenarios</th>
<th>Remediation Steps to Take</th>
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| Pending Cost Center P2P $1K Approver          | If document(s) requiring Procurement review/signature are attached:  
1. $1K Approver sends requisition back.  
2. Requisitioner must submit the document that requires review/signature through the Intake Portal and cancel the requisition.  
3. Once document has been reviewed/signed, resubmit the requisition as type 01/02 and attach all required back-up documentation. |
| Pending Cost Center $10K or Unlimited Approver| No action required. The 10k/Unlimited Approver can approve the requisition with no issues or errors. Requisition will workflow to Purchasing (see below).                                                                           |
| Pending Purchasing Approval                   | Any Purchasing staff member reviewing a requisition must select requisition type 01/02 prior to approval, and review/sign any documentation as required.                                                               |

Refer questions to purchasing.helpdesk@yale.edu
Optimizing Your Portal Experience

**WHEN USING THE PORTAL**

- Have all applicable documents on hand
- Complete all required fields including the note field at the bottom of the page.
- Complete a separate intake request for each request even if in same category.
- To ensure accurate tracking, avoid duplicating a request that has already been submitted.

**CONTRACTS**

- All contracts will need to be submitted through the portal for review and approval from Purchasing. ONLY fully executed agreements can be processed through Workday.
- If support request is related to a contract or purchase, a dollar amount or estimated dollar amount is helpful but not required.
### PURCHASE ORDERS
- Business Offices and Departments should follow their own internal approval processes before submitting close PO requests. You will not need to submit proof of approval to Procurement.
- When closing multiple purchase orders, submit one request and attach a list of the purchase orders or list them in the notes.

### POLICY PROCEDURE OR FORMS
- When submitting a question about a policy, procedure or form, please provide the policy, procedure or form number.

### CONTACT THE PURCHASING HELPDESK
- If you have any questions about the portal, when to use it or how to use it.
- If you do not receive a confirmation message within the portal after submitting your request.
- If you receive an error message.
- If you do not receive a confirmation email within one business day of submitting your request.
FOR HELP:

Contact purchasing.helpdesk@yale.edu for questions about the portal functionality.

TO LEARN MORE:

- https://your.yale.edu/work-yale/financial-management/procurement/systems-and-tools
- Purchasing Intake Information Session
- Purchasing Intake Portal User Guide

Thank you!